# NOTICE OF MEETING

## UTAH STATE BOARD OF EDUCATION

**April 9-10, 2015**

Utah State Office of Education
Board/Committee Rooms
250 East 500 South
Salt Lake City, Utah

**Thursday, April 9**

3:00 p.m. Study Session

5:15 p.m. Board Committee Meetings
- Finance Committee
- Law and Licensing Committee
- Standards and Assessment Committee

**Friday, April 10**

8:00 a.m. Board Meeting Begins

3:40 p.m. Board Meeting Adjourns

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**Public Participation**: To sign up in advance for public comment, contact Board Secretary Lorraine Austin (lorraine.austin@schools.utah.gov or 801-538-7517) prior to the day of the meeting or sign up at the meeting by 8:00 a.m. Priority will be given to those that sign up in advance. You are welcome to send written comment to the Board at board@schools.utah.gov.

**NOTE:** The April 10 meeting will be broadcast beginning at 8:00 a.m. To view the broadcast, go to the link www.schools.utah.gov/board. Times are approximate. The committee meetings and executive session will not be broadcast.

In compliance with the Americans with Disabilities Act, persons needing auxiliary communicative aids and services for these meetings should contact Lorraine Austin at (801) 538-7517 or lorraine.austin@schools.utah.gov, giving at least three working days notice.

**UTAH STATE BOARD OF EDUCATION**

**BOARD MEMBERS**


**David L. Crandall, Board Chair**
**District 10**
**Draper, Utah 84020**

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**West Valley City, Utah 84120**

**Linda B. Hansen**
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**Jefferson Moss**
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**Saratoga Springs, Utah 84045**

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**Provo, Utah 84694**

**Spencer F. Stokes**
**District 2**
**Ogden, Utah 84403**

**Terryl Warner**
**District 1**
**Hyrum, Utah 84319**

**Joel Wright**
**District 9**
**Cedar Hills, Utah 84062**

**Teresa L. Theurer***
**Marlin K. Jensen***
**Steven R. Moore****
**Freddie Cooper*****
**Nancy Tingey******
**Kristin Elinkowski*******

**Brad C. Smith, Chief Executive Officer**
**Lorraine Austin, Board Secretary**

* Appointed Board of Regents Representative
**Appointed UCAT Representative
***Advisory Appointed CMAC Representative
**** Advisory Appointed USBA Representative
*****Appointed State Charter School Board Representative

**UTAH STATE BOARD OF EDUCATION**
**MEETING AGENDA**

April 9-10, 2015

**Thursday, April 9, 2015**

**STUDY SESSION**

*3:00 p.m. to 3:45 p.m.*
1. **INFORMATION:** USOE Online Management Budget Report Training

*3:45 p.m. to 4:45 p.m.*
2. **INFORMATION:** Parliamentary Procedures Training

*4:45 p.m. to 5:15 p.m.*
**DINNER**

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*5:15 p.m.*
3. **BOARD COMMITTEE MEETINGS**

**Finance Committee**

1st Floor Conference Room 156

| | |
|---|---|
| **DISCUSSION/ACTION:** Update on USOR Fiscal Issues | Tab 3-A |
| **DISCUSSION/ACTION:** USOE and Discretionary Fund Quarterly Budget Review | Tab 3-B |
| **DISCUSSION/ACTION:** FY 2016 USOE/USDB Budget Process | Tab 3-C |
| **DISCUSSION/ACTION:** Status of Indirect Cost Rate Process | Tab 3-D |
| **ACTION:** Taxing Entity Committee Representatives | Tab 3-E |
| **DISCUSSION/ACTION:** Pupil Accounting | Tab 3-F |
| **DISCUSSION/ACTION:** Training on Finance and Audit Items | Tab 3-G |
| **INFORMATION:** Budget and Accounting System Conversion | Tab 3-H |
| **DISCUSSION/ACTION:** New Board Rules and Rule Changes Needed as a Result of Legislation | Tab 3-I |
| **INFORMATION:** Finance Committee Requests for Data | Tab 3-J |

**Law and Licensing Committee**

Basement West Conference Room

**ACTION:** R277-490 *Beverley Taylor Sorenson Arts Learning Program* (Amendment) — Tab 3-K

**ACTION:** Procedures for Distributing New Money for the Professional Outreach Program for the Schools — Tab 3-L

**ACTION:** Approval of New Charter School Applications for 2016-2017 School Year — Tab 3-M

**Time Certain: 6:00** - **DISCUSSION/ACTION:** USOE Chief Privacy Officer and HB 68 *Student Privacy Study* — Tab 3-N

**ACTION:** Charter Amendment Request from Freedom Preparatory Academy — Tab 3-O

**ACTION:** R277-520 *Appropriate Licensing and Assignment of Teachers* (Continuation and Amendment) — Tab 3-P

**ACTION:** R277-502 *Educator Licensing and Data Retention* (Amendment) — Tab 3-Q

**ACTION:** R277-410 *Accreditation of Schools* (Amendment and Continuation) — Tab 3-R

**ACTION:** R277-419-6 *Pupil Accounting–High School Completion Status* (Amendment) — Tab 3-S

**DISCUSSION:** Framework for R277-419-9 *Pupil Accounting - Provisions for Maintaining Student Membership and Enrollment Documentation and Documentation of Student Education Services Provided by Third Party Vendors* — Tab 3-T

**DISCUSSION/ACTION:** New Board Rules and Rule Changes Needed as a Result of Legislation — Tab 3-U

**Standards and Assessment Committee**

Board Room

**ACTION:** Release of Grades 6-8 Science Standards Draft for 90-day Public Review — Tab 3-V

**<u>Time Certain: 6:00</u>** - **ACTION:** R277-404 *Requirement for Assessment for Student Achievement* (Amendment) — Tab 3-W

**ACTION:** Release K-5 Library Media Standards Draft for 90-day Public Review — Tab 3-X

**ACTION:** Standards Review Committee Recommendations for Physical Education — Tab 3-Y

**ACTION:** Standards Review Committee Recommendations for Secondary Social Studies — Tab 3-Z

**ACTION:** Standards Review Committee Recommendations for Fine Arts — Tab 3-AA

**INFORMATION:** FFY 2013 IDEA Part B Annual Performance (APR) and State Systemic Improvement Plan (SSIP) — Tab 3-BB

**DISCUSSION/ACTION:** New Board Rules and Rule Changes Needed as a Result of Legislation — Tab 3-CC

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**BOARD MEETING**

**<u>Friday, April 10, 2015</u>**

*8:00 a.m. to 8:15 a.m.*

4. **Opening Business**
   - Pledge of Allegiance
   - Board Member Message
   - Introduction of New Employees
   - Acknowledgment of Student Artwork

*8:15 a.m. to 8:25 a.m.*

5. **Recognition**

*8:25 a.m. to 8:35 a.m.*

6. **Public Participation/Comment**

   Priority shall be given to those individuals or groups, who, prior to the day of the meeting, have submitted a request to address the Board. Sign up is available the day of the meeting before 8:00 a.m.

*8:35 a.m. to 8:40 a.m.*

7. **ACTION:** Approval of Appointments to the Utah State Office of Rehabilitation

*8:40 a.m. to 8:45 a.m.*

8. **ACTION:** General Consent Calendar (backup furnished electronically at http://www.schools.utah.gov/board/Meetings.aspx). Tab 8

*8:45 a.m. to 9:00 a.m.*

9. **INFORMATION/ACTION:** Report from North Sanpete School Board

*9:00 a.m. to 9:15 a.m.*

10. **INFORMATION:** Utah Schools for the Deaf and the Blind Quarterly Report Tab 10

*9:15 a.m. to 11:30 a.m.*

11. **DISCUSSION:** 2015 Legislative Session Tab 11
    - Legislative Appropriations Review - USOE and USOR

    **BREAK**

    - Legislative Bill Review

*11:30 a.m. to 11:45 a.m.*

12. **ACTION:** Board Audit Committee Report

*11:45 p.m. to 11:55 p.m.*

13. **ACTION:** Utah Professional Practices Advisory Commission Cases Tab 13

*11:55 p.m. to 12:30 p.m*

**LUNCH**

*12:30 p.m. to 1:30 a.m.*

14. **ACTION:** Committee Reports
    - Finance Committee
    - Law and Licensing Committee
    - Standards and Assessment Committee

*1:30 p.m. to 1:50 p.m.*

15. **INFORMATION:** Update on Educator Effectiveness Tab 15

*1:50 p.m. to 2:05 p.m.*

16. **INFORMATION**: Superintendent's Report
    - Risk Mitigation Plan Tab 16

*2:05 p.m. to 2:15 p.m.*

17. **INFORMATION:** Board Chair's Report

*2:15 p.m. to 2:30 p.m.*

18. **INFORMATION:** Board Member Closing Comments

*2:30 p.m. to 3:30 p.m.*

19. **EXECUTIVE SESSION**

3*:30 p.m. to 3:40 p.m.*

20. **ACTION:** Executive Session Items
    - UPPAC Cases
    - Appointments

*3:40 p.m.*

21. **ADJOURNMENT**

**Finance Committee**
1st Floor Conference Room 156

| | |
|---|---|
| **DISCUSSION/ACTION:** Update on USOR Fiscal Issues | Tab 3-A |
| **DISCUSSION/ACTION:** USOE and Discretionary Fund Quarterly Budget Review | Tab 3-B |
| **DISCUSSION/ACTION:** FY 2016 USOE/USDB Budget Process | Tab 3-C |
| **DISCUSSION/ACTION:** Status of Indirect Cost Rate Process | Tab 3-D |
| **ACTION:** Taxing Entity Committee Representatives | Tab 3-E |
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| **INFORMATION:** Budget and Accounting System Conversion | Tab 3-H |
| **DISCUSSION/ACTION:** New Board Rules and Rule Changes Needed as a Result of Legislation | Tab 3-I |
| **INFORMATION:** Finance Committee Requests for Data | Tab 3 |

UTAH STATE BOARD OF EDUCATION

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Brad C. Smith, Chief Executive Officer
Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**DISCUSSION/ ACTION:** Interim Budget and Status of Funds Report for the Utah State Office of Rehabilitation (USOR)

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**Background:**
USOR is experiencing a structural imbalance. Scott Jones was appointed as the Interim Executive Director to essentially gain control of the overall USOR budget and set standards and conditions for effective Funds Control and Funds Management in future years. He will be giving the report on the budget status to the Committee.

**Key Points:**

- Status on the $6.3 million Supplemental for client services; key management expectations and communications.
- Status of funds for the overall USOR budget period ending March 31, 2015.
- Identification and implementation of key Internal controls since March 23, 2015.
- Audit findings and recommendations and corrective actions to date.
- Resource requirements.
- Fiscal Year 16 Budget formulation; Fiscal Year 17 budget formulation.
- USBE approval of the USOR FY 16 budget-projected for May Board meeting.

**Anticipated Action:**
An interim report will be given and the Committee may give direction to staff and make amendments to the budget process.

**Contact:** Scott Jones, Interim USOR Executive Director, 801-319-0471 or sjones@utah.gov
Bruce Williams, Associate Superintendent, 801-538-7514

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

UTAH STATE BOARD OF EDUCATION

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Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**DISCUSSION/ ACTION:** USOE and Discretionary Fund Quarterly Budget Review

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**Background:**
The budget calendar adopted by the State Board calls for a quarterly budget review of each division and a review of the discretionary funds account. Bruce Williams and staff from Internal Accounting will review the current working budget for the USOE and the discretionary funds account.

**Key Points:**
The Finance Committee will receive the financial report and have the opportunity to ask questions concerning fiscal operations for the USOE.

**Anticipated Action:**
The Committee may give direction to staff and make changes to the budget/budget process.

**Contact:** Bruce D. Williams, Associate Superintendent, 801-538-7514
Gary Belliston, Director of Internal Accounting, 801-538-7627

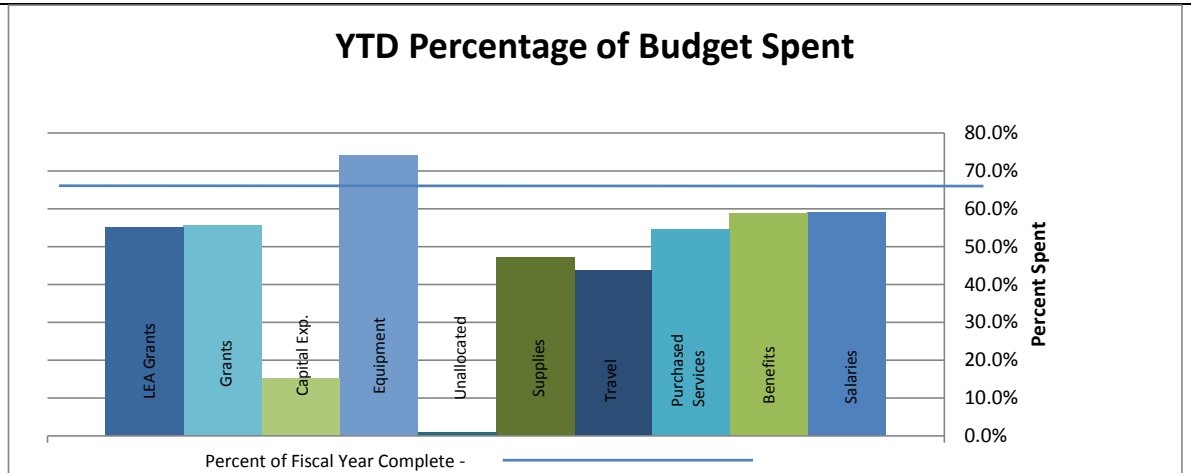
250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

# Utah State Board of Education Financial Report
## Fiscal Year 2015
## Month Ending Febrary 28, 2015
## Agency Totals

| % of FY Complete - | 67% |
|---|---|
| # of FTE Staff - | 1098.75 |

| Description | Original Budget | Current Budget | Current Month Expenditures | YTD Expenditures | Encumbrance | Budget Balance | % of Budget Spent |
|---|---|---|---|---|---|---|---|
| **EXPENDITURES** | | | | | | | |
| Salaries | 58,299,000 | 59,069,400 | 4,267,400 | 34,933,500 | - | 24,135,900 | 59.1% |
| Benefits | 31,843,100 | 33,231,200 | 2,378,300 | 19,512,800 | - | 13,718,400 | 58.7% |
| Purchased Services | 56,124,900 | 59,618,700 | 4,065,800 | 32,130,200 | 324,100 | 27,164,400 | 54.4% |
| Travel | 1,731,800 | 1,804,700 | 93,500 | 788,100 | 1,900 | 1,014,700 | 43.8% |
| Supplies & Materials | 14,624,200 | 18,604,400 | 1,583,100 | 8,376,200 | 401,500 | 9,826,700 | 47.2% |
| Unallocated Expenses | 7,591,500 | 4,056,100 | 1,100 | 42,600 | 100 | 4,013,400 | 1.1% |
| Equipment | 3,600,200 | 3,422,600 | 155,100 | 2,026,000 | 512,000 | 884,600 | 74.2% |
| Capital Expenditures | 626,000 | 591,800 | - | 38,100 | 52,400 | 501,300 | 15.3% |
| TOTAL EXPENDITURES | 174,440,700 | 180,398,900 | 12,544,300 | 97,847,500 | 1,292,000 | 81,259,400 | 55.0% |
| Grants & Transfers to Other Agencies | 134,795,300 | 125,934,500 | 6,933,600 | 54,922,700 | - | 71,011,800 | 43.6% |
| Flow Through Funds to LEAs | 3,182,148,300 | 3,716,944,700 | 268,587,900 | 2,064,808,400 | - | 1,652,136,300 | 55.6% |
| TOTAL EXP. & FLOW THROUGH | 3,491,384,300 | 4,023,278,100 | 288,065,800 | 2,217,578,600 | 1,292,000 | 1,804,407,500 | 55.2% |

| REVENUES | Original Budget | Current Budget | Current Month Revenue | YTD Revenues | Encumbrance | Budget Balance | % Received |
|---|---|---|---|---|---|---|---|
| State Sources | 2,915,381,800 | 3,239,747,600 | 240,899,400 | 1,936,938,700 | 734,000 | 1,302,074,900 | 59.8% |
| Federal Sources | 508,585,100 | 708,623,800 | 41,941,400 | 250,210,300 | 241,300 | 458,172,200 | 35.3% |
| Other Sources | 67,417,400 | 74,906,700 | 5,225,000 | 30,429,600 | 316,700 | 44,160,400 | 41.0% |
| TOTAL REVENUES & SOURCES | 3,491,384,300 | 4,023,278,100 | 288,065,800 | 2,217,578,600 | 1,292,000 | 1,804,407,500 | 55.2% |



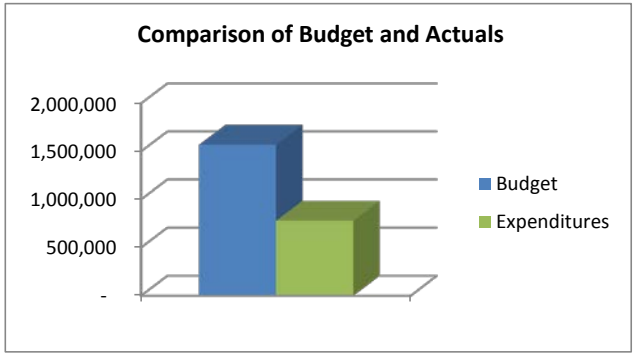
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 5

### Board of Education

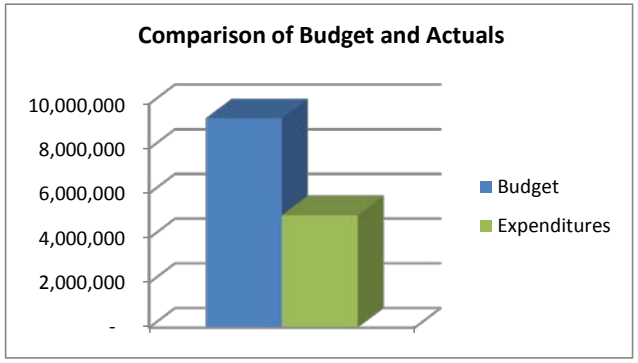
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 451,500 | 451,200 | 259,800 | - | 191,400 | 57.58% |
| Benefits | 338,700 | 339,000 | 188,200 | - | 150,800 | 55.52% |
| Purchased Services | 24,200 | 54,900 | 54,700 | 200 | - | 100.00% |
| Travel | 76,600 | 81,200 | 81,200 | - | - | 100.00% |
| Supplies & Materials | 175,800 | 512,600 | 117,800 | 75,200 | 319,600 | 37.65% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | 23,500 | 23,300 | 2,000 | - | 21,300 | 8.58% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 1,090,300 | 1,462,200 | 703,700 | 75,400 | 683,100 | 53.28% |
| Flow Through | 105,800 | 105,800 | - | - | 105,800 | 0.00% |
| Total Exp. & Flow Thru | 1,196,100 | 1,568,000 | 703,700 | 75,400 | 788,900 | 49.69% |




# of FTE Staff - 45

### Administration

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 2,866,200 | 2,965,600 | 1,872,700 | - | 1,092,900 | 63.15% |
| Benefits | 1,492,900 | 1,496,000 | 958,800 | - | 537,200 | 64.09% |
| Purchased Services | 1,589,900 | 3,157,900 | 654,000 | 2,500 | 2,501,400 | 20.79% |
| Travel | 16,600 | 24,000 | 11,500 | - | 12,500 | 47.92% |
| Supplies & Materials | 339,100 | 999,000 | 960,100 | 38,900 | - | 100.00% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | 770,300 | 398,800 | 174,300 | 224,500 | - | 100.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 7,075,000 | 9,041,300 | 4,631,400 | 265,900 | 4,144,000 | 54.17% |
| Flow Through | 62,500 | 325,000 | 130,500 | - | 194,500 | 40.15% |
| Total Exp. & Flow Thru | 7,137,500 | 9,366,300 | 4,761,900 | 265,900 | 4,338,500 | 53.68% |



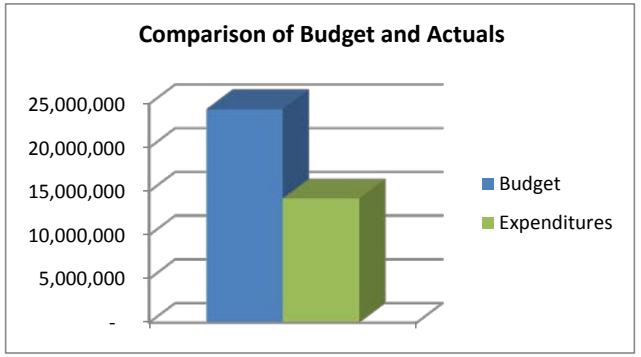
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete - 67%**

# of FTE Staff - 28

### Assessment and Accountability

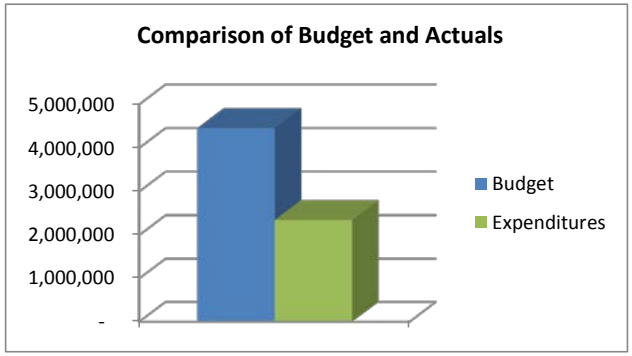
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 1,802,600 | 1,781,800 | 1,110,300 | - | 671,500 | 62.31% |
| Benefits | 1,019,400 | 1,010,400 | 611,200 | - | 399,200 | 60.49% |
| Purchased Services | 16,146,500 | 18,976,100 | 11,077,300 | - | 7,898,800 | 58.38% |
| Travel | 171,700 | 189,500 | 13,300 | - | 176,200 | 7.02% |
| Supplies & Materials | 262,000 | 158,200 | 25,800 | 100 | 132,300 | 16.37% |
| Unallocated Expenses | - | 38,000 | - | - | 38,000 | 0.00% |
| Equipment | 35,500 | 70,600 | 25,300 | 4,200 | 41,100 | 41.78% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 19,437,700 | 22,224,600 | 12,863,200 | 4,300 | 9,357,100 | 57.90% |
| Flow Through | 2,189,900 | 2,195,200 | 1,340,900 | - | 854,300 | 61.08% |
| Total Exp. & Flow Thru | 21,627,600 | 24,419,800 | 14,204,100 | 4,300 | 10,211,400 | 58.18% |




# of FTE Staff - 7

### Charter School Board

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 493,200 | 642,700 | 257,600 | - | 385,100 | 40.08% |
| Benefits | 278,500 | 279,000 | 137,900 | - | 141,100 | 49.43% |
| Purchased Services | 703,900 | 989,800 | 41,100 | - | 948,700 | 4.15% |
| Travel | 32,400 | 32,400 | 16,200 | - | 16,200 | 50.00% |
| Supplies & Materials | 241,300 | 236,900 | 22,500 | 1,000 | 213,400 | 9.92% |
| Unallocated Expenses | 15,900 | 15,900 | - | - | 15,900 | 0.00% |
| Equipment | 10,000 | 16,400 | 14,000 | 2,300 | 100 | 99.39% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 1,775,200 | 2,213,100 | 489,300 | 3,300 | 1,720,500 | 22.26% |
| Flow Through | 2,243,400 | 2,243,400 | 1,857,100 | - | 386,300 | 82.78% |
| Total Exp. & Flow Thru | 4,018,600 | 4,456,500 | 2,346,400 | 3,300 | 2,106,800 | 52.73% |



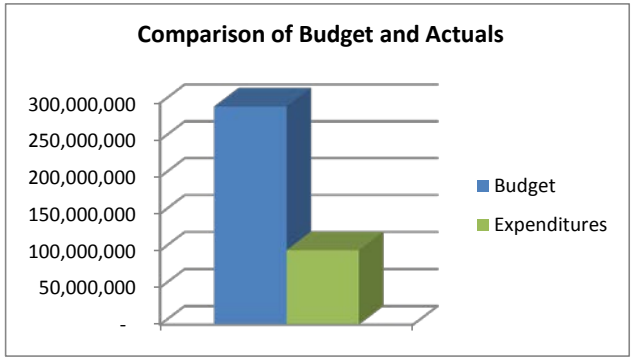
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 23

### Child Nutrition Programs

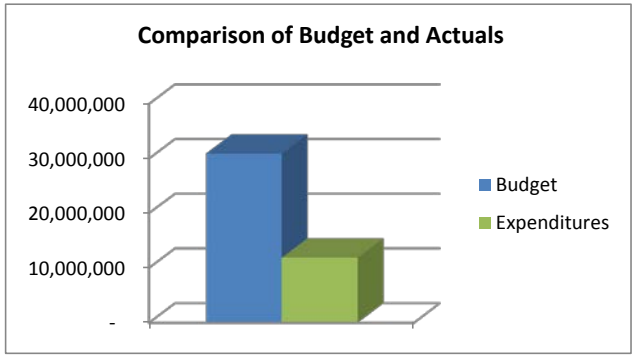
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 1,330,300 | 1,849,200 | 711,900 | - | 1,137,300 | 38.50% |
| Benefits | 701,600 | 961,800 | 407,100 | - | 554,700 | 42.33% |
| Purchased Services | 216,700 | 805,200 | 232,000 | 300 | 572,900 | 28.85% |
| Travel | 74,400 | 110,800 | 36,900 | - | 73,900 | 33.30% |
| Supplies & Materials | 257,200 | 288,200 | 215,500 | 800 | 71,900 | 75.05% |
| Unallocated Expenses | 94,900 | 93,900 | - | - | 93,900 | 0.00% |
| Equipment | 40,000 | 84,000 | 43,400 | 40,600 | - | 100.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 2,715,100 | 4,193,100 | 1,646,800 | 41,700 | 2,504,600 | 40.27% |
| Flow Through | 194,555,100 | 291,412,200 | 99,040,900 | - | 192,371,300 | 33.99% |
| Total Exp. & Flow Thru | 197,270,200 | 295,605,300 | 100,687,700 | 41,700 | 194,875,900 | 34.08% |




# of FTE Staff - 41.1

### Career and Technology Education

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 2,433,800 | 2,879,200 | 1,523,600 | - | 1,355,600 | 52.92% |
| Benefits | 1,294,400 | 1,423,100 | 833,900 | - | 589,200 | 58.60% |
| Purchased Services | 151,200 | 159,000 | 91,900 | - | 67,100 | 57.80% |
| Travel | 127,100 | 108,400 | 59,800 | - | 48,600 | 55.17% |
| Supplies & Materials | 985,200 | 865,300 | 233,300 | - | 632,000 | 26.96% |
| Unallocated Expenses | 44,500 | 636,800 | - | - | 636,800 | 0.00% |
| Equipment | 70,200 | 73,000 | 19,900 | 800 | 52,300 | 28.36% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 5,106,400 | 6,144,800 | 2,762,400 | 800 | 3,381,600 | 44.97% |
| Flow Through | 23,241,700 | 24,760,100 | 9,088,600 | - | 15,671,500 | 36.71% |
| Total Exp. & Flow Thru | 28,348,100 | 30,904,900 | 11,851,000 | 800 | 19,053,100 | 38.35% |



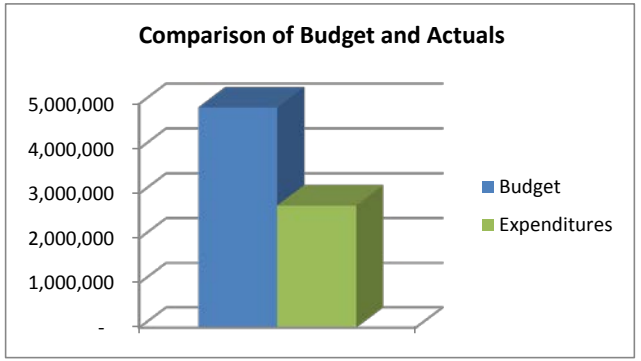
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 37

### District Computer Services

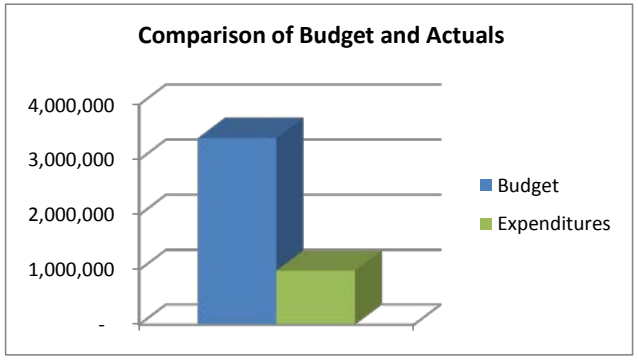
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 2,384,900 | 2,171,900 | 1,394,500 | - | 777,400 | 64.21% |
| Benefits | 1,363,500 | 1,411,800 | 764,600 | - | 647,200 | 54.16% |
| Purchased Services | 29,000 | 29,000 | 2,500 | 700 | 25,800 | 11.03% |
| Travel | 5,500 | 5,500 | 400 | - | 5,100 | 7.27% |
| Supplies & Materials | 233,500 | 530,100 | 376,100 | 13,500 | 140,500 | 73.50% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | 186,300 | 318,500 | 166,600 | 14,000 | 137,900 | 56.70% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 4,202,700 | 4,466,800 | 2,704,700 | 28,200 | 1,733,900 | 61.18% |
| Flow Through | 479,700 | 457,100 | 7,100 | - | 450,000 | 1.55% |
| Total Exp. & Flow Thru | 4,682,400 | 4,923,900 | 2,711,800 | 28,200 | 2,183,900 | 55.65% |




# of FTE Staff - 0

### Educational Contracts

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | - | - | - | - | - | 0.00% |
| Benefits | - | - | - | - | - | 0.00% |
| Purchased Services | - | - | - | - | - | 0.00% |
| Travel | - | - | - | - | - | 0.00% |
| Supplies & Materials | - | - | - | - | - | 0.00% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | - | - | - | - | - | 0.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | - | - | - | - | - | 0.00% |
| Flow Through | 3,137,800 | 3,396,000 | 991,300 | - | 2,404,700 | 29.19% |
| Total Exp. & Flow Thru | 3,137,800 | 3,396,000 | 991,300 | - | 2,404,700 | 29.19% |



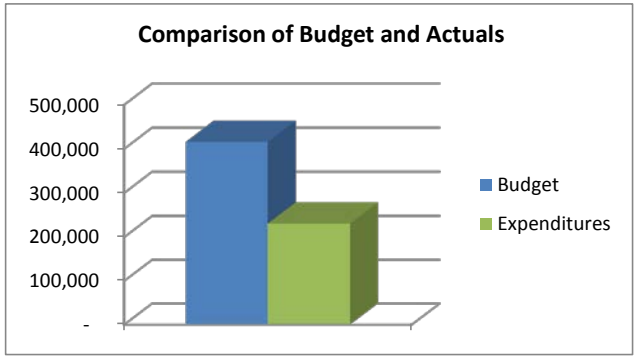
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete - 67%**

# of FTE Staff - 3

### Educational Equity

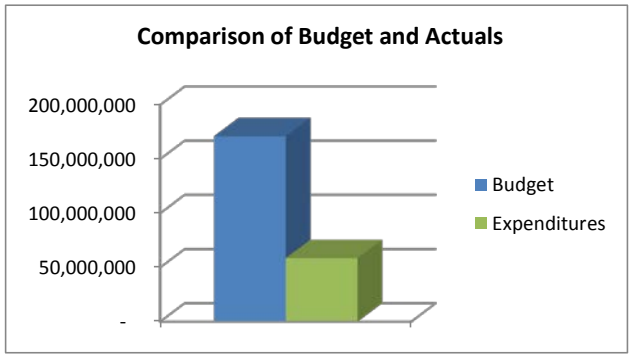
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 196,700 | 195,000 | 121,100 | - | 73,900 | 62.10% |
| Benefits | 111,600 | 111,500 | 70,000 | - | 41,500 | 62.78% |
| Purchased Services | 6,600 | 11,700 | 3,800 | - | 7,900 | 32.48% |
| Travel | 3,400 | 3,300 | 2,000 | - | 1,300 | 60.61% |
| Supplies & Materials | 25,600 | 52,200 | 14,100 | 1,600 | 36,500 | 30.08% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | 2,700 | 700 | 300 | 100 | 300 | 57.14% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 346,600 | 374,400 | 211,300 | 1,700 | 161,400 | 56.89% |
| Flow Through | 41,300 | 41,500 | 17,900 | - | 23,600 | 43.13% |
| Total Exp. & Flow Thru | 387,900 | 415,900 | 229,200 | 1,700 | 185,000 | 55.52% |




# of FTE Staff - 18.25

### ESEA and Special Programs

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 1,604,000 | 1,068,800 | 618,800 | - | 450,000 | 57.90% |
| Benefits | 16,400 | 551,000 | 351,500 | - | 199,500 | 63.79% |
| Purchased Services | 322,000 | 369,100 | 119,300 | 12,300 | 237,500 | 35.65% |
| Travel | 61,700 | 100,100 | 26,900 | - | 73,200 | 26.87% |
| Supplies & Materials | 477,500 | 626,500 | 174,600 | 100 | 451,800 | 27.89% |
| Unallocated Expenses | 1,900,200 | 1,272,500 | - | - | 1,272,500 | 0.00% |
| Equipment | 20,300 | 76,900 | 24,300 | 15,100 | 37,500 | 51.24% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 4,402,100 | 4,064,900 | 1,315,400 | 27,500 | 2,722,000 | 33.04% |
| Flow Through | 79,649,300 | 167,098,500 | 57,358,400 | - | 109,740,100 | 34.33% |
| Total Exp. & Flow Thru | 84,051,400 | 171,163,400 | 58,673,800 | 27,500 | 112,462,100 | 34.30% |



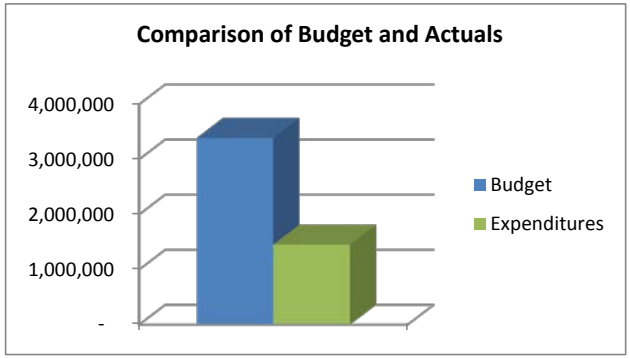
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 0

### Fine Arts (POPS)

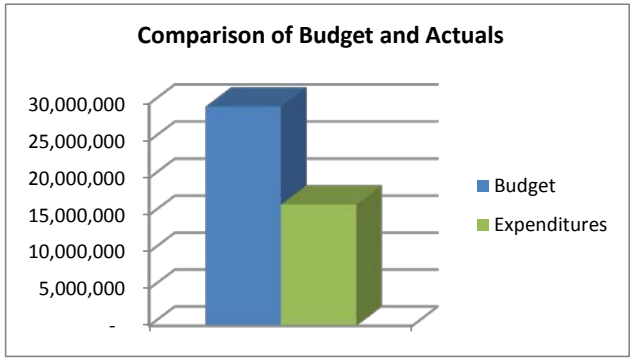
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | - | - | - | - | - | 0.00% |
| Benefits | - | - | - | - | - | 0.00% |
| Purchased Services | - | - | - | - | - | 0.00% |
| Travel | - | - | - | - | - | 0.00% |
| Supplies & Materials | - | - | - | - | - | 0.00% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | - | - | - | - | - | 0.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | - | - | - | - | - | 0.00% |
| Flow Through | 3,325,000 | 3,390,900 | 1,454,300 | - | 1,936,600 | 42.89% |
| Total Exp. & Flow Thru | 3,325,000 | 3,390,900 | 1,454,300 | - | 1,936,600 | 42.89% |




# of FTE Staff - 4.4

### Grants and Contracts

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 231,600 | 263,200 | 113,000 | - | 150,200 | 42.93% |
| Benefits | 101,400 | 118,500 | 51,500 | - | 67,000 | 43.46% |
| Purchased Services | 21,929,700 | 21,491,800 | 12,384,600 | 167,500 | 8,939,700 | 58.40% |
| Travel | 15,300 | 15,000 | 200 | - | 14,800 | 1.33% |
| Supplies & Materials | 4,224,200 | 5,103,500 | 2,852,800 | - | 2,250,700 | 55.90% |
| Unallocated Expenses | 257,700 | 262,500 | 2,500 | - | 260,000 | 0.95% |
| Equipment | 328,300 | 328,300 | 299,800 | - | 28,500 | 91.32% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 27,088,200 | 27,582,800 | 15,704,400 | 167,500 | 11,710,900 | 57.54% |
| Flow Through | 1,440,200 | 2,048,300 | 549,800 | - | 1,498,500 | 26.84% |
| Total Exp. & Flow Thru | 28,528,400 | 29,631,100 | 16,254,200 | 167,500 | 13,209,400 | 55.42% |



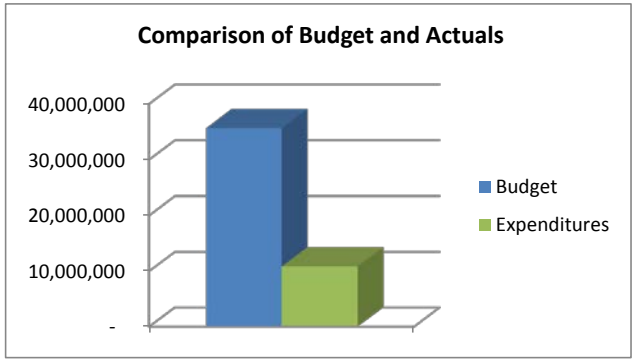
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete - 67%**

# of FTE Staff - 36.5

### Instructional Services-Teaching and Learning

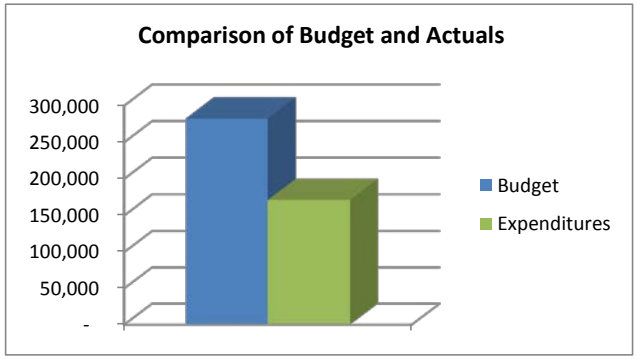
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 1,908,800 | 1,708,900 | 1,028,500 | - | 680,400 | 60.18% |
| Benefits | 974,900 | 842,400 | 555,600 | - | 286,800 | 65.95% |
| Purchased Services | 758,100 | 1,107,000 | 384,900 | 900 | 721,200 | 34.85% |
| Travel | 70,900 | 66,000 | 49,500 | - | 16,500 | 75.00% |
| Supplies & Materials | 1,838,800 | 2,220,500 | 376,100 | - | 1,844,400 | 16.94% |
| Unallocated Expenses | 500,000 | 27,100 | - | - | 27,100 | 0.00% |
| Equipment | 7,700 | 9,100 | 3,800 | 1,800 | 3,500 | 61.54% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 6,059,200 | 5,981,000 | 2,398,400 | 2,700 | 3,579,900 | 40.15% |
| Flow Through | 32,072,700 | 29,666,700 | 8,479,100 | - | 21,187,600 | 28.58% |
| Total Exp. & Flow Thru | 38,131,900 | 35,647,700 | 10,877,500 | 2,700 | 24,767,500 | 30.52% |




# of FTE Staff - 2

### Law and Legislation

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 150,400 | 150,300 | 96,900 | - | 53,400 | 64.47% |
| Benefits | 79,100 | 78,800 | 53,300 | - | 25,500 | 67.64% |
| Purchased Services | 7,900 | 7,300 | 1,300 | - | 6,000 | 17.81% |
| Travel | 4,200 | 3,900 | 1,500 | - | 2,400 | 38.46% |
| Supplies & Materials | 7,700 | 8,900 | 4,400 | 200 | 4,300 | 51.69% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | 2,400 | 2,200 | - | - | 2,200 | 0.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 251,700 | 251,400 | 157,400 | 200 | 93,800 | 62.69% |
| Flow Through | 30,800 | 31,100 | 13,600 | - | 17,500 | 43.73% |
| Total Exp. & Flow Thru | 282,500 | 282,500 | 171,000 | 200 | 111,300 | 60.60% |



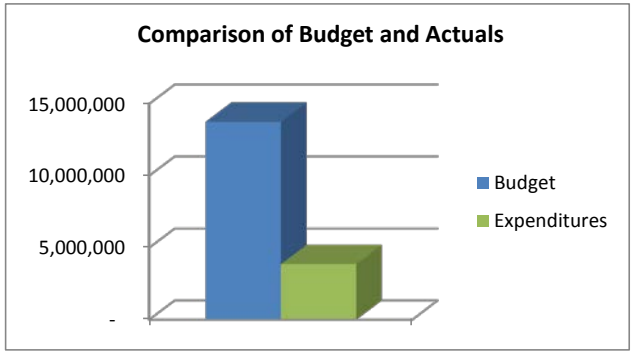
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete - 67%**

# of FTE Staff - 17.2

### Licensing and UPPAC

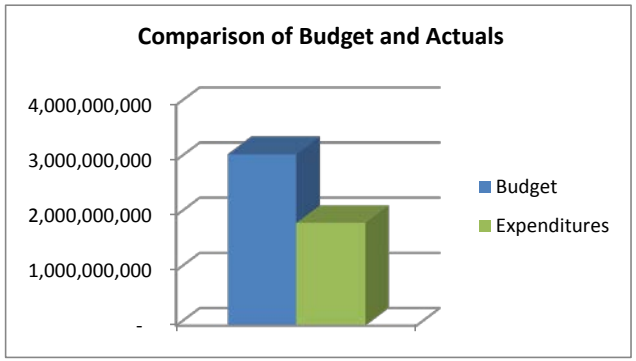
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 845,300 | 990,200 | 506,300 | - | 483,900 | 51.13% |
| Benefits | 515,900 | 512,600 | 284,200 | - | 228,400 | 55.44% |
| Purchased Services | 832,600 | 760,800 | 242,500 | 48,200 | 470,100 | 38.21% |
| Travel | 12,700 | 12,400 | 3,500 | - | 8,900 | 28.23% |
| Supplies & Materials | 180,200 | 393,700 | 139,200 | 5,800 | 248,700 | 36.83% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | 2,000 | 18,900 | 18,800 | 100 | - | 100.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 2,388,700 | 2,688,600 | 1,194,500 | 54,100 | 1,440,000 | 46.44% |
| Flow Through | 6,206,900 | 11,067,400 | 2,616,500 | - | 8,450,900 | 23.64% |
| Total Exp. & Flow Thru | 8,595,600 | 13,756,000 | 3,811,000 | 54,100 | 9,890,900 | 28.10% |




# of FTE Staff - 0

### Minimum School Program

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | - | - | - | - | - | 0.00% |
| Benefits | - | - | - | - | - | 0.00% |
| Purchased Services | - | - | - | - | - | 0.00% |
| Travel | - | - | - | - | - | 0.00% |
| Supplies & Materials | - | - | - | - | - | 0.00% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | - | - | - | - | - | 0.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | - | - | - | - | - | 0.00% |
| Flow Through | 2,788,612,900 | 3,108,199,700 | 1,863,712,600 | - | 1,244,487,100 | 59.96% |
| Total Exp. & Flow Thru | 2,788,612,900 | 3,108,199,700 | 1,863,712,600 | - | 1,244,487,100 | 59.96% |



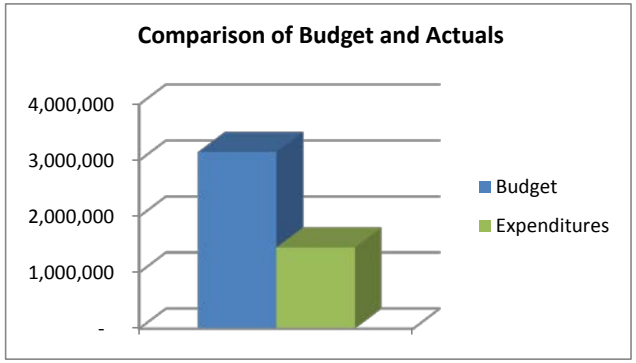
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete - 67%**

# of FTE Staff - 16

### School Finance

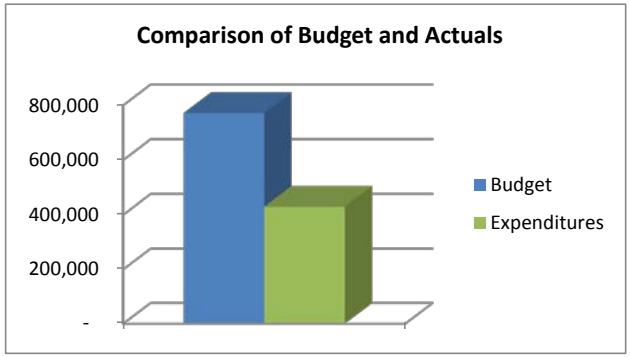
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 1,033,300 | 1,021,800 | 627,900 | - | 393,900 | 61.45% |
| Benefits | 584,900 | 589,000 | 360,800 | - | 228,200 | 61.26% |
| Purchased Services | 276,900 | 465,300 | 3,900 | - | 461,400 | 0.84% |
| Travel | 47,600 | 49,400 | 18,200 | - | 31,200 | 36.84% |
| Supplies & Materials | 64,400 | 64,700 | 11,000 | 100 | 53,600 | 17.16% |
| Unallocated Expenses | 13,700 | - | - | - | - | 0.00% |
| Equipment | 15,200 | 15,300 | 3,100 | 1,200 | 11,000 | 28.10% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 2,036,000 | 2,205,500 | 1,024,900 | 1,300 | 1,179,300 | 46.53% |
| Flow Through | 733,800 | 946,700 | 425,000 | - | 521,700 | 44.89% |
| Total Exp. & Flow Thru | 2,769,800 | 3,152,200 | 1,449,900 | 1,300 | 1,701,000 | 46.04% |




# of FTE Staff - 4

### School Trust Lands

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 280,500 | 283,200 | 177,300 | - | 105,900 | 62.61% |
| Benefits | 152,800 | 157,200 | 98,600 | - | 58,600 | 62.72% |
| Purchased Services | 68,600 | 66,100 | 33,700 | 600 | 31,800 | 51.89% |
| Travel | 12,000 | 19,800 | 12,000 | - | 7,800 | 60.61% |
| Supplies & Materials | 39,100 | 27,400 | 5,700 | - | 21,700 | 20.80% |
| Unallocated Expenses | 15,000 | - | - | - | - | 0.00% |
| Equipment | 2,300 | 4,000 | 1,400 | - | 2,600 | 35.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 570,300 | 557,700 | 328,700 | 600 | 228,400 | 59.05% |
| Flow Through | 138,100 | 214,000 | 100,300 | - | 113,700 | 46.87% |
| Total Exp. & Flow Thru | 708,400 | 771,700 | 429,000 | 600 | 342,100 | 55.67% |



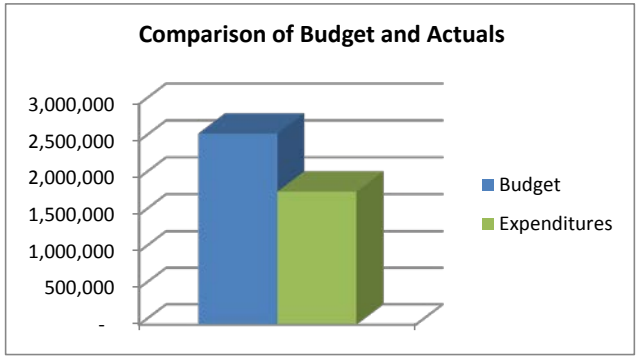
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 0

### Science (Isee)

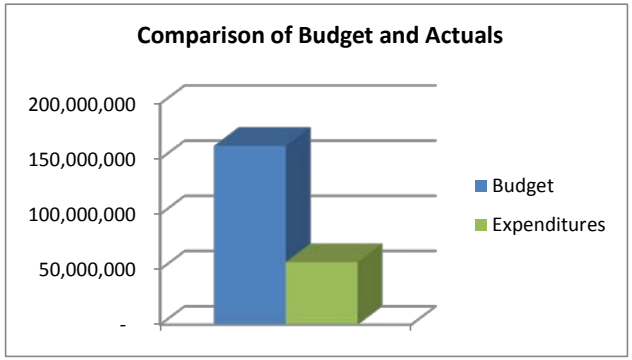
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | - | - | - | - | - | 0.00% |
| Benefits | - | - | - | - | - | 0.00% |
| Purchased Services | - | - | - | - | - | 0.00% |
| Travel | - | - | - | - | - | 0.00% |
| Supplies & Materials | - | - | - | - | - | 0.00% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | - | - | - | - | - | 0.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | - | - | - | - | - | 0.00% |
| Flow Through | 2,600,000 | 2,600,000 | 1,811,200 | - | 788,800 | 69.66% |
| Total Exp. & Flow Thru | 2,600,000 | 2,600,000 | 1,811,200 | - | 788,800 | 69.66% |




# of FTE Staff - 22.6

### Special Education

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 1,822,300 | 1,517,400 | 929,100 | - | 588,300 | 61.23% |
| Benefits | 846,400 | 829,200 | 500,700 | - | 328,500 | 60.38% |
| Purchased Services | 5,215,200 | 2,496,000 | 961,300 | - | 1,534,700 | 38.51% |
| Travel | 163,800 | 149,300 | 55,300 | - | 94,000 | 37.04% |
| Supplies & Materials | 282,000 | 537,900 | 215,500 | 5,400 | 317,000 | 41.07% |
| Unallocated Expenses | 4,318,400 | 1,133,200 | - | - | 1,133,200 | 0.00% |
| Equipment | 41,700 | 113,600 | 84,800 | 5,800 | 23,000 | 79.75% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 12,689,800 | 6,776,600 | 2,746,700 | 11,200 | 4,018,700 | 40.70% |
| Flow Through | 132,975,300 | 155,201,900 | 54,037,900 | - | 101,164,000 | 34.82% |
| Total Exp. & Flow Thru | 145,665,100 | 161,978,500 | 56,784,600 | 11,200 | 105,182,700 | 35.06% |



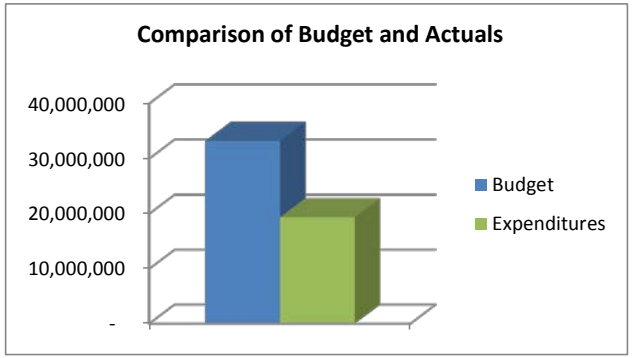
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 332

### Schools for Deaf and Blind

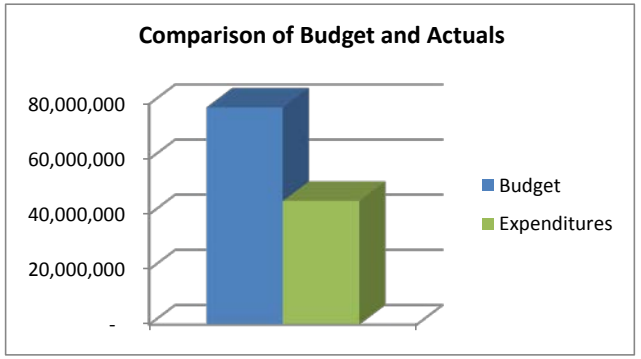
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 15,473,700 | 15,480,400 | 9,331,000 | - | 6,149,400 | 60.28% |
| Benefits | 8,717,100 | 8,726,400 | 5,225,400 | - | 3,501,000 | 59.88% |
| Purchased Services | 4,899,500 | 5,009,600 | 3,194,600 | 17,300 | 1,797,700 | 64.11% |
| Travel | 462,300 | 459,700 | 248,400 | 1,900 | 209,400 | 54.45% |
| Supplies & Materials | 2,197,700 | 2,858,500 | 863,800 | 69,700 | 1,925,000 | 32.66% |
| Unallocated Expenses | - | 250,000 | 1,100 | - | 248,900 | 0.44% |
| Equipment | 238,700 | 412,200 | 403,200 | 9,000 | - | 100.00% |
| Capital Expenditures | 26,000 | 30,800 | - | 18,900 | 11,900 | 61.36% |
| TOTAL EXPENDITURES | 32,015,000 | 33,227,600 | 19,267,500 | 116,800 | 13,843,300 | 58.34% |
| Flow Through | - | - | - | - | - | 0.00% |
| Total Exp. & Flow Thru | 32,015,000 | 33,227,600 | 19,267,500 | 116,800 | 13,843,300 | 58.34% |




# of FTE Staff - 461.7

### State Office of Rehabilitation

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 22,989,900 | 23,648,600 | 14,253,300 | - | 9,395,300 | 60.27% |
| Benefits | 13,253,800 | 13,793,300 | 8,059,400 | - | 5,733,900 | 58.43% |
| Purchased Services | 2,946,200 | 3,662,000 | 2,646,800 | 73,500 | 941,700 | 74.28% |
| Travel | 373,700 | 374,100 | 151,400 | - | 222,700 | 40.47% |
| Supplies & Materials | 2,792,800 | 3,120,400 | 1,767,800 | 189,100 | 1,163,500 | 62.71% |
| Unallocated Expenses | 431,300 | 326,200 | 39,000 | 100 | 287,100 | 11.99% |
| Equipment | 1,803,200 | 1,457,000 | 741,100 | 192,600 | 523,300 | 64.08% |
| Capital Expenditures | 600,000 | 561,000 | 38,100 | 33,500 | 489,400 | 12.76% |
| TOTAL EXPENDITURES | 45,190,900 | 46,942,600 | 27,696,900 | 488,800 | 18,756,900 | 60.04% |
| Flow Through | 37,901,400 | 31,853,600 | 16,664,300 | - | 15,189,300 | 52.32% |
| Total Exp. & Flow Thru | 83,092,300 | 78,796,200 | 44,361,200 | 488,800 | 33,946,200 | 56.92% |



# FY 2015 Discretionary Funds Budget

4/7/2015

| | FY 2015 State Funds | Mineral Lease | Land Exchange | Total Budget | Expended | Balance |
|---|---|---|---|---|---|---|
| **FY 2014 Available Funds** | $1,987,296.00 | $1,817,561.00 | $0.00 | $3,804,857.00 | | |
| **Ongoing** | | | | | | |
| Employee Service Award Luncheon | $1,300.00 | | | $1,300.00 | $1,040.40 | $259.60 |
| Technical Writer Internal Audit | $60,000.00 | | | $60,000.00 | $0.00 | $60,000.00 |
| Internal Auditor | $100,000.00 | | | $100,000.00 | $0.00 | $100,000.00 |
| Board Attorney | $150,000.00 | | | $150,000.00 | $0.00 | $150,000.00 |
| Additional Superintendent Salary | $33,500.00 | | | $33,500.00 | $0.00 | $33,500.00 |
| | $344,800.00 | $0.00 | $0.00 | $344,800.00 | $1,040.40 | $343,759.60 |
| **Ongoing - Could be Cancelled** | | | | | | |
| Utah Teacher of the Year | $33,000.00 | | | $33,000.00 | $27,406.87 | $5,593.13 |
| Milken Blue Ribbon Panel | $400.00 | | | $400.00 | $0.00 | $400.00 |
| District visits & Superintendent meetings | $8,000.00 | | | $8,000.00 | $0.00 | $8,000.00 |
| Utah Teacher's Forum | $500.00 | | | $500.00 | $0.00 | $500.00 |
| CERT/CPR/AED Training & Supplies | $1,500.00 | | | $1,500.00 | $135.00 | $1,365.00 |
| Interstate Commission for Military Children | $3,571.00 | | | $3,571.00 | $3,571.00 | $0.00 |
| Teachers-Teachers | $143,232.50 | | | $143,232.50 | $107,424.28 | $35,808.22 |
| Employee Action Committee | $4,500.00 | | | $4,500.00 | $2,920.63 | $1,579.37 |
| Schools to Watch | $12,000.00 | | | $12,000.00 | $4,446.02 | $7,553.98 |
| USOE Internal Professional Development | $1,500.00 | | | $1,500.00 | $0.00 | $1,500.00 |
| College & Career Readiness Program Pilot | $0.00 | $120,000.00 | | $120,000.00 | $120,000.00 | $0.00 |
| iKeepSafe | $25,000.00 | | | $25,000.00 | $0.00 | $25,000.00 |
| Rural School Conference | $30,000.00 | | | $30,000.00 | $0.00 | $30,000.00 |
| USSA Professional Development | $8,000.00 | | | $8,000.00 | $8,000.00 | $0.00 |
| | $271,203.50 | $120,000.00 | $0.00 | $391,203.50 | $273,903.80 | $117,299.70 |
| **One-time** | | | | | | |
| Admin/USBE Technology/Equipment | $75,000.00 | | | $75,000.00 | $0.00 | $75,000.00 |
| Basement West Pictures | $500.00 | | | $500.00 | $0.00 | $500.00 |
| Capital Repairs/ Upgrades | $100,000.00 | | | $100,000.00 | $0.00 | $100,000.00 |
| Superintendent Projects/CCSSO Memberships | $50,000.00 | | | $50,000.00 | $43,000.00 | $7,000.00 |
| Superintendent Discretionary | $250,000.00 | $400,000.00 | | $650,000.00 | $260,241.16 | $389,758.84 |
| Deputy Superintendent Projects/CCSSO Memberships | $40,000.00 | | | $40,000.00 | $300.00 | $39,700.00 |
| Assoc. Supt. Assessment Projects/CCSSO Memberships | $48,000.00 | | | $48,000.00 | $48,000.00 | $0.00 |
| Assoc. Supt. Business & Operations Projects | $17,000.00 | | | $17,000.00 | $5,836.46 | $11,163.54 |
| Superintendent Search Contract | $50,000.00 | | | $50,000.00 | $0.00 | $50,000.00 |
| Update Board Room Technology and Tables | $200,000.00 | | | $200,000.00 | $1,340.25 | $198,659.75 |
| Educator Effectiveness | | $450,000.00 | | $450,000.00 | $3,247.63 | $446,752.37 |
| Carbon Monoxide Detector Pilot | $150,000.00 | | | $150,000.00 | $0.00 | $150,000.00 |
| IT Audit/ Response to UEN Audit | $200,000.00 | | | $200,000.00 | $201.13 | $199,798.87 |
| | $1,180,500.00 | $850,000.00 | | $2,030,500.00 | $362,166.63 | $1,668,333.37 |
| Total | $1,796,503.50 | $970,000.00 | | $2,766,503.50 | $637,110.83 | $2,129,392.67 |
| Remaining Balance | $190,792.50 | $847,561.00 | | $1,038,353.50 | | |

| FY 2015 SCT Budget | | | | | | | | | | | | | | | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| PERSONNEL w indirect | | | | | | | | | | | | | | | $506,639.34 |
| 2088 hrs/yr | | | $4,888.27 | $317.64 | | | | | | | | | | | |
| 26.1 pay periods/yr | | | $10,079.00 | $589.86 | | | | | | | | | | | |
| | | (inc cashout) | $13,455.85 | $1,074.01 | 0.60% | 6.20% | 1.45% | 0.25% | 0.88% | 23.70% | 5.27% | | 13.50% | | |
| EMPLOYEE | RATE | ANNUAL | HEALTH | DENTAL | DISABLT | FICA | MEDICARE | UNEMP | WKCMP | RETIRE | TERM | SUB | INDIRECT | TOTAL | |
| 1 - avg 4 rates | 48.72 | 102,117.12 | 13,455.85 | 1074.01 | 612.70 | 6,331.26 | 1,480.70 | 255.29 | 898.63 | 24,201.76 | 5,381.57 | 155,845.56 | 21,039.15 | 176,884.71 | |
| 2 - avg 2 rates | 35.59 | 74,311.92 | 13,455.85 | 1074.01 | 445.87 | 4,607.34 | 1,077.52 | 185.78 | 653.94 | 17,611.93 | 3,916.24 | 117,377.06 | 15,845.90 | 133,222.96 | |
| 3 - avg 2 rates | 32.26 | 69,681.60 | 10,079.00 | 589.86 | 418.09 | 4,320.26 | 1,010.38 | 174.20 | 613.20 | 16,514.54 | 3,672.22 | 107,110.01 | 14,459.85 | 121,569.87 | |
| 4.00 | 21.13 | 43,948.74 | 4,888.27 | 317.64 | 263.69 | 2,724.82 | 637.26 | 109.87 | 386.75 | 10,415.85 | 2,316.10 | 66,045.65 | 8,916.16 | 74,961.81 | |
| TRAVEL | | | | | | | | | | | | | | | $15,000.00 |
| PURCHASED SERVICES | | | | | | | | | | | | | | | $62,131.50 |
| Human Resources Services | | | | | | | | | | | | | | | $2,256.00 |
| Payroll Servcices | | | | | | | | | | | | | | | $256.00 |
| Wireless Communication S | KR | | | | | | | | | | | | | | $900.00 |
| Communication Services | VOIP & 3 Cell | | | | | | | | | | | | | | $4,140.00 |
| Other Contractual Non Medical | Move | | | | | | | | | | | | | | $95.00 |
| Postage and Mailing | | | | | | | | | | | | | | | $300.00 |
| Prof & Technical | Utah Interactive | | | | | | | | | | | | | | $52,000.00 |
| Required Technical References | Lexisd Nexis $118.17/mo | | | | | | | | | | | | | | $1,420.00 |
| Rental of Land and Buildings | | | | | | | | | | | | | | | $764.50 |
| EQUIPMENT (office furnishings and computers) | | | | | | | | | | | | | | | $4,009.00 |
| SUPPLIES AND MATERIALS | | | | | | | | | | | | | | | $16,357.15 |
| Buildings and Grounds | | | | | | | | | | | | | | | $7,029.00 |
| Office Supplies | | | | | | | | | | | | | | | $300.00 |
| Printing and Binding | | | | | | | | | | | | | | | $150.00 |
| Photocopy | | | | | | | | | | | | | | | $100.00 |
| Insurance & Bonds | | | | | | | | | | | | | | | $1,500.00 |
| Exhibits, Displays, and Awards | | | | | | | | | | | | | | | $0.00 |
| Membership Dues | | | | | | | | | | | | | | | $1,110.00 |
| Conventions, Seminars, W, C | | CFA, WSLCA, SCC Trainings | | | | | | | | | | | | | $5,000.00 |
| Taxable Meal | | | | | | | | | | | | | | | $32.00 |
| Prof Dev & Training | | Catered Nom Committee | | | | | | | | | | | | | $200.00 |
| Unclassified Other | | | | | | | | | | | | | | | $0.00 |
| DTS Telecom | | Going Away | | | | | | | | | | | | | $936.15 |
| TOTAL INCOME | (Interest and Dividends Approp,) $536,000 + $58,000 +$12,300 + $11,000 | | | | | | | | | | | | | | $617,300.00 |
| TOTAL EXPENSE | | | | | | | | | | | | | | | $604,136.99 |
| DIFFERENCE | | | | | | | | | | | | | | | $13,163.01 |

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# UTAH STATE BOARD OF EDUCATION
# MEETING MINUTES

March 5-6, 2015

## BOARD STUDY SESSION, MARCH 5, 2015

A Study Session of the Utah State Board of Education was held March 5, 2015 at the Utah State Office of Education, 250 East 500 South, Salt Lake City, Utah. At the direction of the Chair, Second Vice Chair Jennifer Johnson conducted.

Those attending included Board Members Dixie Allen, Leslie Castle, Brittney Cummins, Barbara Corry, Linda Hansen, Mark Huntsman, Jennifer Johnson, Jefferson Moss, Mark Openshaw, Teresa Theurer, Nancy Tingey and Terryl Warner. Board and State Office of Education staff attending included Sydnee Dickson, Bruce Williams, Judy Park, Lorraine Austin, Emilie Wheeler, Chris Lacombe, Nicole Call, Sarah Young, Ricky Scott, Travis Rawlings and Robert Austin. Others attending included Jay Blain, UEA; Bonilynn Henrie and Sharon Zenger, USDBEA; Joylin Lincoln; Nathan Andelin, Relational Data Corp.; and Tina Smith, UAPCS.

Vice Chair Johnson called the meeting to order at 4:03 p.m.

### Standards Revision Process and Timeline

Deputy Superintendent Sydnee Dickson gave a presentation on standards setting and the standards review process.

Member Moss asked for a comparison with how other states revise standards. He also indicated it would be helpful for staff to report why standards are being adopted, how it will be done, and why it is an improvement.

Member Cummins questioned whether too much pedagogy is include in the standards and asked if there could be separation between pedagogy, teaching methods, and standards. USOE Teaching and Learning Director Diana Suddreth clarified that pedagogy and teaching methods are not included in the standards. Deputy Superintendent Dickson informed the Board there has been some confusion because what has been presented to the Board in the past were standards plus material for teacher assistance. In the future just the standards and

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objectives will come to the Board.

Dr. Dickson requested input from the Board on what they would like to receive as far as standards and what should be posted to the public. She clarified that teacher resources are developed to ensure the standards are actualized in the classroom.

Member Hansen commented that it has been extremely helpful for her as a parent to have access to the standards. Vice Chair Johnson reported that she has talked to some parents that feel overwhelmed by the standards because they are highly detailed and not easy to consume.

Deputy Superintendent Dickson reviewed the Board-approved revision schedule and asked for input. It was noted that there is a matrix on the Board website with the timeline.

Member Moss asked if the standards review committee looks at the current standards or looks at proposed changes to standards, and what happens with the feedback they give.

Member Allen expressed that she has found with the 90-day public review there has been a communication gap between staff, the districts, and the public receiving notification.

Member Moss asked how feedback is received from the public and how that feedback is incorporated into the standards. He asked if the Board receives public feedback before it is incorporated into the standards. Dr. Suddreth indicated that feedback is incorporated prior to standards coming to the Board unless there is a broad or controversial concept; then Board input will be sought. She felt it would be helpful for the Board to give input along the way. Member Moss requested that the Board be engaged all through the process. Dr. Dickson indicated the Board will be engaged early on in the process to give direction.

Member Cummins suggested an addition to the process, that an item come to the Board prior to the beginning of a standards revision process to inform the Board about why revisions are needed. The Board would then give approval for the revision process to start. After approval is given, the standards review committee would meet and a report would come back to the Board with the standards review committee feedback.

Member Castle asked for more focus on diversity in the standards review committee membership.

Member Hansen suggested that before a standards review committee is convened, staff

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come to the Board with a recommendation to convene the committee.

Mark Huntsman suggested that a flow chart be developed that would allow Board members to track where the specific standards being revised are in the process and pinpointing when the Board is expected to make decisions. Dr. Dickson indicated she will have staff design a specific time frame once the Board gives the green light to start the revisions process.

Member Cummins suggested adding into the timeline set by the Board a review of the standards review committee and adding interim times for the Board to check in on the process. This would allow the Board to handle public concerns in a more timely manner. Dr. Dickson will revise the timeline accordingly. It will be up to the Board to decide whether reports go to the full Board or a committee.

Vice Chair Johnson recommended that as the membership of several of the upcoming standards review committees has already been determined, those committees be invited to come to Board meeting when the standards review request initially comes to the Board.

**MOTION** was made by Member Castle and seconded by Member Huntsman that the meeting adjourn.

Motion carried. The meeting adjourned at 5:53 p.m.

**Board Committee Meetings**

The Board's Finance Committee, Law and Licensing Committee, and Standards and Assessment Committees met following the Study Session.

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**UTAH STATE BOARD OF EDUCATION MEETING, MARCH 6, 2015**

A regular meeting of the Utah State Board of Education was held March 6, 2015 at the Utah State Office of Education, 250 East 500 South, Salt Lake City, Utah. Chair David Crandall conducted. The meeting commenced at 8:00 a.m.

**Board Members Present:**

Chair David L. Crandall
1st Vice Chair David L. Thomas
2nd Vice Chair Jennifer A. Johnson
Member Dixie L. Allen
Member Laura Belnap
Member Leslie B. Castle
Member Barbara W. Corry
Member Brittney Cummins
Member Linda B. Hansen
Member Mark Huntsman
Member Marlin K. Jensen (non-voting)
Member Steven R. Moore (non-voting)
Member Jefferson Moss
Member C. Mark Openshaw
Member Spencer F. Stokes
Member Nancy Tingey (non-voting)
Member Terryl Warner
Member Joel Wright

**Board Members Excused:**

Member Freddie Cooper (non-voting)
Member Kristin Elinkowski (non-voting)
Member Teresa L. Theurer (non-voting)

**Executive and Board Staff Present:**

Brad Smith, State Superintendent
Sydnee Dickson, Deputy Supt.
Judy Park, Associate Supt.
Bruce Williams, Associate Supt.
Joel Coleman, USDB Superintendent
Lorraine Austin, Board Secretary
Emilie Wheeler, Board Communications Specialist
Debbie Davis, Board Interim Internal Auditor
Chris Lacombe, Assistant A.G.
Nicole Call, Assistant A.G.

**Others Present:**

Lisa Nentl-Bloom, Utah Education Association; Michelle Rodgers; Cheryl Phipps, Utah PTA; Heather Gardner; Lydia Nuttall; Cindy Davis; Elizabeth Lim; LeAnn Wood

**Opening Business**

Chair David Crandall called the meeting to order at 8:00 a.m. Member Mark Openshaw led those present in the Pledge of Allegiance.

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Board Member Message

Member Linda Hansen related an experience she had at a book drive at a local elementary school. When the children taking the books realized they could keep them, there was joy on their faces. She learned that there are children that live around her that have needs she didn't know about. She related the experience to the Board, noting that as the Board sits in meetings without children before them, it may be easy to forget about the students. She encouraged Board members to remember that what they do does trickle down to the children and that the Board is needed.

Introduction of New Employees

Human Resources Director Dave Rodemack introduced new USOE employees Ricky Scott and Abigail Miller.

Assistant Attorney General Nicole Call, who will be working with the Board, was also introduced.

Acknowledgment of Student Artwork

Arts Specialist Cathy Jensen acknowledged the art work hung in the Board Room from Summit Academy Charter School, Oakwood Elementary School, and HMK Elementary School.

Changes to Agenda

Updates to the agenda were noted. Additions included Appointment of a TEC Representative and an update of the University of Phoenix-Utah Accreditation. Items 2-B, 2-C and 2-D were removed from the Finance Committee. The changes were appropriately noticed as required.

**Recognition/Achievement Spotlight**

Former Board Member Dean Rowley was thanked for his service on the Board. Mr. Rowley was the appointed Utah School Boards Association representative and served from 2011 through 2014. He was given a piece of original children's art work. He commented that it

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was a pleasure for him to serve on the Board and he appreciated the experience.

Deputy Superintendent Sydnee Dickson spotlighted the winners of the Utah LEGO League State Championship. On January 31 Team Jedi won the first place champions award. Each team built LEGO robots and developed innovation presentations. The team will compete this summer in the first world festival in St. Louis, Missouri. Team members included Tavo Estrada, Onalee Estrada, Kim, Katie and Allison Drennan, Jacob Anderson and Nicole Brooks. These young innovators and their coaches were applauded by the Board and presented with a Certificate of Excellence.

**Executive Session**

**MOTION** was made by Vice Chair Johnson and seconded by Member Huntsman that the Board move into Executive Session for the purpose of discussing the character, professional competence, and physical or mental health of individuals.

Upon voice vote of the members present, the Board moved into Executive Session at 8:16 a.m. Those present included Members Allen, Belnap, Castle, Corry, Crandall, Cummins, Hansen, Huntsman, Johnson, Jensen, Moore, Moss, Openshaw, Stokes, Thomas, Tingey, Warner and Wright; and Brad Smith, Sydnee Dickson, Lorraine Austin, Emilie Wheeler, Chris Lacombe and Nicole Call.

**MOTION** was made by Member Openshaw seconded by Member Wright that the Board come out of Executive Session.

Motion carried. The meeting reconvened in open session at 9:00 a.m.

**Public Comment**

Lydia Nuttall, parent - reported about a book she found about the Pledge of Allegiance where the page with the phrase “under God, indivisible” had been ripped out. She questioned what will happen to the nation if freedom from religion is supported. She expressed the desire to meet with the Governor and various organizations to promote liberty and justice for all in every aspect of life, and invited Board members to join with her.

Cindy Davis, parent - asked the Board to listen to those in true Title I schools as it

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considers the Elementary and Secondary Education Act (ESEA) waiver. She suggested that if the Board uses the same strong language used in the last waiver request, the Board will not have to request $30 million in funding from the legislature. She asked the Board to give those students every opportunity.

Dawn Davies, Utah PTA - relayed that PTA respectfully requests that the Board reapply for the ESEA waiver. Utah will maintain greater flexibility through its ability to use Title I funds at its discretion. She questioned whether Congress will reauthorize the Elementary and Secondary Education Act, and asked the Board to weigh very strongly the needs of students and move to reapply for the waiver.

Lisa Nentl-Bloom, Utah Education Association - updated the Board on the work UEA is doing with an assessment literacy task force. The goal is to develop curriculum to help their members use assessment to identify if students are achieving. This task force is almost finished with developing the curriculum and will train through spring and summer. She thanked the Board and Superintendent for the opportunity to collaborate with them during the legislative session. She also extended an offer from UEA to assist with rulemaking needed as a result of bills passed.

Jason Benson, parent - asked the Board to apply to for a waiver renewal of ESEA. As a principal of a Title I school, he sees the needs of those students who don't always have support at home. He is fighting for those students, and feels the responsibility to provide educational opportunities for them. He invited the Board to spend a day at his school with the teachers.

Michelle Rodgers - expressed that as a former educator and now parent of three children it's hard to ignore things happening at her local schools. Half the teachers have left since the adoption of the Common Core. She proposed that the things being done today that are wrong will continue if the ESEA waiver is continued, and asked the Board to vote for Utah's children by voting against any waiver.

Elizabeth Lim, advocate against sex abuse - shared that since Utah has implemented Aaron's Law a sex abuse prevention program is needed. She shared a book she has written, SCREAM. RUN. TELL. to teach children about sex abuse.

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**General Consent Calendar**

**MOTION** was made by Member Openshaw and seconded by Member Corry that the Board approve the General Consent Calendar.

Motion carried unanimously.

A. Minutes of Previous Meeting

Minutes of the State Board of Education meeting held February 6, 2015 were approved.

B. Monthly Budget Report

The Board received the monthly budget report.

C. Contracts

The Board approved the following contracts:

1. Precision Exams LLC, $393,691, 02/01/2015 to 1/31/2020

   To provide assistance to USOE in the development of the General Financial Literacy Assessment Training.

   This contract was mistakenly listed as a receivable on the Consent Calendar of the Board's January 8, 2015 meeting, and the Board approved it as such. It was resubmitted as a regular contract.

2. Educational Research and Training Corporation, $595,000, 03/20/2015 to 03/19/2020, federal

   To provide online Migrant Achievement and Performance System (MAPS)/State Migrant Education Program comprehensive needs assessment, State Service Delivery Plan, Migrant Education Program Evaluation, and Prospective Re-interview.

3. Utah Parent Center, $180,000, 03/09/2015 to 03/09/2020, federal

   To provide information and training to parents of children with disabilities through the Parent Training Information (PTI) Project of the Utah Parent Center.

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D. Contract Report

The Board received the report, *Upcoming Contracts with Renewals*.

E. Work Incentives Planning and Assistance Program (WIPA) Grant

The Board approved the Utah State Office of Rehabilitation (USOR) applying for renewal of the federal WIPA grant, and receipt of the grant funds.

F. R277-116 *Utah State Board of Education Internal Audit Procedure*

In its February 6, 2015 meeting, the Board approved amendments to R277-116 on second reading. The rule was amended to bring it into consistency with the Board Bylaws and update definitions of the Audit Committee and Internal Auditor.

The Board approved R277-116 *Utah State Board of Education Internal Audit Procedure*, as amended, on third and final reading.

G. R277-504 *Early Childhood, Elementary, Secondary, Special Education (K-12), and Preschool Special Education (Birth-Age 5) Licensure*

In its February 6, 2015 meeting, the Board approved amendments to R277-504 on second reading. The rule was amended to clarify the expectation of technology instruction for educator preparation programs to include instruction in the use of software for personalized learning. Amendments also updated language regarding working with students with disabilities to include positive behavior supports and Multi-Tiered Systems of Support (MTSS).

The Board approved R277-504 *Early Childhood, Elementary, Secondary, Special Education (K-12), and Preschool Special Education (Birth-Age 5) Licensure*, as amended, on third and final reading.

H. R280-200 *Rehabilitation*

In its February 6, 2015 meeting, the Board approved amendments to R280-200 on second reading. A new section was added to give clarity to the authority required for the State Office of Rehabilitation to make application for new federal grants or reallotment funding.

The Board approved R280-200 *Rehabilitation*, as amended, on third and final reading.

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I. Requests for Temporary Authorizations

The Board approve temporary authorizations for licenses as submitted by school districts and charter schools.

J. List of Educator Licenses Processed

The Board received the summary of the total number of educator licenses and license areas processed in February 2015.

**Elementary and Secondary Education Act (ESEA) Flexibility Renewal**

Superintendent Brad Smith reported that staff has prepared a request to renew the ESEA waiver with the understanding that it will not be submitted unless the Board approves. The due date for submitting the request is March 30, 2015. He reminded them that the Board sought $30 million from the legislature to backfill any potential loss of funding flexibility that would be caused by the lack of a waiver, but it does not appear that any appropriation for that $30 million request has been made.

Superintendent Smith presented three potential courses of action:

1. The Board could instruct the Superintendent to do nothing. The effect would be that no waiver renewal of ESEA would be sought and, therefore, the provisions of currently existing law, in particular No Child Left Behind (NCLB), would be implemented. It's unclear what that implementation would look like because under NCLB every school would be deemed a failing school. As there would be no non-failing schools it is unclear how the transportation requirement would be met.

2. The Board could direct him to finalize the application for a full waiver to be exempted from NCLB provisions for the next three years. The assertion of a waiver is subject to conditions posed by U.S. Department of Education. However, if a waiver were granted under the same terms and conditions accepted for the waiver last year, there would be a strong assertion of state sovereignty with the provision that the Board retain the complete right to alter assessments, evaluations, education standards, or any other aspect of the Utah education system without the opportunity of the federal government to cut off funding or take

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other punitive action.

3. The Board could request a partial or mini-waiver. The Board could request that specific obligations under NCLB be waived such as the obligation to implement evaluation or a particular assessment system under the statute be waived. The Board could also request a full waiver for less than three years.

Member Belnap asked for clarification about Utah's obligation to the federal government whether it seeks the waiver or not. It was clarified that Utah will be under federal obligation in either circumstance because of the federal dollars received. The Board has a choice of the set of federal regulations by which it will be governed. Superintendent Smith reported that the amount of federal money Utah receives will not change if a waiver isn't granted. It Utah is granted a waiver, local education agencies (LEAs) will retain local flexibility to spend Title I funds, as appropriate under the law, as they see fit. However, if Utah is not under a waiver and a school is designated a failing school under NCLB, then NCLB dictates how the school must spend some of its Title I money. This would include paying the transportation costs from a failing school to a non-failing school, and providing remedial or after-school programs. NCLB dictates a number of remedial measures for schools that are deemed failing under the law.

Member Moss reiterated that there would not be a loss of funds without a waiver. Superintendent Smith confirmed that and noted that the purpose of requesting the $30 million from the legislature was to make sure there would be no loss of flexibly available funds. Member Moss asked if there would be an enforceable mechanism for the use of those funds that are required to be set aside for failing schools under NCLB. Superintendent Smith indicated that the measures that are most the clear are remedial measures such as after-school programs. Transportation to non-failing schools is not clear.

Member Moss noted that North Dakota has received mini-waivers for its rural schools and suggested that Utah could pursue mini-waivers for specific areas. Member Castle expressed that she is not supportive of moving away from a relationship with the federal government. She suggested that prior to making a decision the Board talk with local superintendents and local school board members to address their needs.

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Vice Chair Johnson asked if there is a different deadline than March 30 for mini-waivers. Superintendent Smith was not aware of different time frame. He noted that North Dakota sought mini-waivers b outside of the deadline.

Member Warner questioned who, under NCLB, would make the decision regarding school support teams and how are the teams funded. Superintendent Smith responded that the local education agency (LEA) would hire school support teams using Title I funds received by the LEA. Every school in Year 1 School Improvement would have to hire a school support team.

Member Stokes asked for clarification if the waiver has anything to do with the Common Core. Superintendent Smith responded that the conditions the U.S. Department of Education purport to impose when a waiver is sought is for a state to adopt more rigorous education standards. No specific standards are listed. The waiver Utah received last year reserves the right for Utah to unilaterally change its standards as it chooses. Also, NCLB explicitly forbids the federal government from requiring states to adopt particular curricular standards. Member Stokes commented that if Utah doesn't ask for a waiver it would still need standards.

Vice Chair Thomas informed that last year he crafted the language for the waiver to ensure that the Board has authority for certifying that its standards are college and career ready without asking for approval from Higher Education.

Member Stokes asked what Utah would be getting out of by not requesting the identical waiver as the one now in place. There was some suggestion that Utah might not have to comply with requirements for an assessment system or teacher evaluation system under NCLB. Deputy Superintendent Dickson clarified that with the waiver all that it required now regarding educator evaluation is that we report what system is in place and outline how we're determining student growth. Utah's educator evaluation system is a result of legislation (SB 64, 2012 Legislative Session) and Board rule (R277-531). Nothing in the federal law dictates performance pay. She also reported that if Utah was to go back to NCLB without the waiver, 28 schools would be planning for restructuring in school year 2015-16.

Associate Superintendent Judy Park reported that the assessment system required

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under NCLB and state law was not affected by the flexibility waiver. The piece that was changed with the waiver was the accountability system. NCLB has a required system to which states must adhere; the waiver allows states to develop their own accountability systems.

Chair Crandall asked whether under the waiver Utah could change the teacher evaluation system and assessment system without approval from the federal government. Dr. Park responded that NCLB requires certain assessments and the waiver doesn't change that requirement. The requirement is for assessment in grades 3-8 and once in high school for language arts, math and science.

Member Coleman commented that it seems everything education has been doing for the last eight or nine years has been under the instigation of the federal government. He thinks we have squandered those years without reaching consensus on a direction.

Superintendent Smith expressed that he shares many of the deep-seated concerns about federal overreach. However, as a superintendent he knows that strong assessment systems, strong evaluation systems and standards-based education constitute a set of reforms that he believes are essential to producing students that are ready to compete and flourish in the modern world.

Member Cummins asked if Utah goes back under NCLB whether the school improvement status for schools would be retroactive, and if so, what the cost would be for the restructuring process. Associate Superintendent Park confirmed that placing schools in school improvement would be retroactive. ESEA and Special Programs Director Ann White informed that one school has gone through that process and it was costly, but she didn't have the dollar amounts. It was clarified that the cost of restructuring has not been figured into the cost of not renewing the waiver.

Member Cummins asked if, under NCLB, specific schools would lose funding because of the requirement to spread funds among more schools. Superintendent Smith responded that some schools could experience a diminution and redirection of funds.

Assistant Attorney General Chris Lacombe discussed his legal analysis regarding the legality of seeking a waiver. In Utah Code 53A-1-903 it suggests the Board is obligated to seek a waiver; however, in 53A-1-904, the statute states it is only necessary to seek a waiver if the

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federal government is violating NCLB Section 9527. The Section states the federal government can't mandate standards and curriculum, among other things. There is a plausible argument that if the Board believes the federal government, through NCLB and the waiver, is violating states rights to make standards, they need to seek a waiver from the law. He felt a more persuasive interpretation is from 53A-1-903 that indicates a waiver from federal regulation must be sought, but doesn't designate whether a full or partial waiver is required.

Vice Chair Johnson referenced a document the Board received last month from Utah Attorney General Reyes which states: "There may be federal entanglements with ESEA waiver conditions that require Utah to adopt and implement college and career ready standards. Since 2012 the U.S. Department of Education has issued Utah an ESEA waiver from No Child Left Behind requirements. In August 2014 Utah requested a one-year waiver extension which is currently being reviewed by the U.S. Department of Education. Under this waiver Utah must comply with the four waiver principles. One of those four principles is 'college and career ready expectations for all students.' This principle requires Utah 'adopt college and career ready standards in at least reading, language arts, and mathematics, transitioning to and implementing such standards statewide for all students in schools.' These ESEA waiver principles and conditions are not part of No Child Left Behind's express statutory terms. As a result a plausible argument exists that ESEA waiver conditions are U.S. Department of Education requirements and are not authorized by Congress in No Child Left Behind. In addition, Utah has been arguably coerced into complying with these ESEA waiver principles." She brought this to the Board's attention as it considers federal entanglements.

Vice Chair Johnson questioned why the state of Washington lost its waiver and if it was over an educator evaluation issue. Dr. Dickson couldn't address it in detail but responded that she understands one of the sticking points was student growth. Regarding student growth the waiver uses the term "significant" in regards to student growth, and there is no clear understanding of the term. Utah did not set a specific growth percentage because there is no research that shows student growth is attributable to the success of a teacher in a significant way. Some other states that did not use a percentage were not successful in obtaining a waiver. In her conversation with the federal government they felt that what is outlined in Utah

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Code and Board rule is significant enough that they allowed Utah to work towards a floor of forty percent. However, in subsequent conversations with the Department of Education, and in a meeting with the Governor and Department representatives, it was made very clear that Utah would control the student growth piece.

Chair Crandall and Member Moss asked if Utah would lose its waiver if growth isn't included in its accountability system. Dr. Dickson clarified that Utah would lose the waiver if it doesn't have an evaluation system. Components of the system have been changed with affecting the waiver. Dr. Dickson could not definitively confirm what the Department of Education will do if additional changes are made to Utah's system, but stated that it is the one principal for which staff has had a great deal of dialogue with the Department, and there was more concern with the time line than the components.

Member Moss expressed concern that staff does not know if Utah will lose its waiver if specific changes are made. Superintendent Smith reiterated that under the existing waiver Utah has reserved its right to make changes to the evaluation system, and the Department unequivocally and unambiguously granted the waiver under those conditions. He interpreted that acceptance to mean Utah can make changes to the system without loss of the waiver. If a further renewal of the waiver is sought on the same basis, he would stand by the same answer. Under implementing regulations it seems clear to him that in order to maintain a waiver under the regulations Utah would have to have an evaluation system that has to have student growth as part of the evaluation system. However, it appears that in granting Utah's waiver, a waiver of this foundational level has also been granted.

Member Moss further questioned if the waiver would only remain in place until Utah such time as Utah made a change on growth in its evaluation system. Superintendent Smith responded that given that the Department accepted the language without qualification he doesn't believe they could enforce that in court. Dr. Dickson added that there was inconsistency in how waivers were approved or disapproved, and there is not a set standard.

Member Stokes noted that in Attorney General Reyes' document on federal entanglements referenced earlier, it also states that "federal entanglements are debatable as to standards. No entanglement exists with respect to curriculum."

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**MOTION** was made by Member Stokes and seconded by Vice Chair Thomas that the Board authorize the State Superintendent to apply for a one-year Elementary and Secondary Education Act (ESEA) flexibility waiver renewal, under the same conditions as the last waiver, unless the legislature provides adequate funding to replace funding flexibility lost by not seeking the ESEA waiver.

Member Stokes clarified that the intent is for the Board not to seek a waiver if the funding is approved.

Member Cummins asked if there is an alternate plan if the waiver is not granted. Superintendent Smith responded that if a waiver request is not granted and another option were offered, he would come to the Board for approval prior to accepting anything outside the terms of the motion.

Vice Chair Johnson pointed out that there is currently a lawsuit pending with respect to the waivers. She expressed interest in understanding how this would play out and questioned what the fallout would be if the quid pro quo nature of the waivers is invalidated. Superintendent Smith responded that the existing lawsuit is the matter of Jindahl v. USA, seeking to declare that the entire waiver process is unconstitutional. The legal rationale has been captured in an upcoming *Vanderbilt Law Review* article entitled, "Federalizing Education by Waiver." The underlying argument is that the entire waiver process is unconstitutional because it seeks to impose by giving a waiver, provisions that Congress has never enacted and under terms and conditions that Congress has never provided the Secretary of Education the authorization to do. If that were correct the entire waiver process is unconstitutional, and therefore, the government would have given states something for which they had no authorization; therefore, the waiver would have no effect and all states would be back under NCLB as if no waiver had been extended. One of the things that struck him as he read the article was that there is strong lack of judicial precedent.

Member Hansen expressed support for the waiver whether the $30 million is appropriated or not. She is not in favor of the way schools are defined under NCLB and the schools that are really in need of improvement will not be identified. Under the waiver, the correct schools are identified and get the help they need.

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Member Castle asked if Utah goes back under NCLB, who is generally favored by the shift in funding. Superintendent Smith replied that funding for some schools will be reduced because there is the potential spreading of the funding over a greater number of recipients. If the legislature appropriates $30 million and Utah doesn't seek the waiver, the $30 million will represent new money into the system. Although under NCLB some Title I money would be redirected, schools would also receive flexible money from the $30 million.

Member Corry questioned why a three-year waiver wouldn't be sought. Member Stokes replied that a one-year waiver provides the Board with flexibility.

Member Belnap asked the Board to wait to vote on the motion until all Board member questions were answered.

**MOTION** was made by Vice Chair Johnson and seconded by Member Moss that the Board take a short break.

Motion carried. The Board took a five-minute break and reconvened at 10:50 a.m.

Member Belnap asked whether contingencies could be sought from No Child Left Behind if the Board does not seek a waiver. Superintendent Smith indicated it could be possible, but stated it seems the Board's negotiating power would be at its lowest point if the Board has not sought a waiver.

Member Warner questioned if it could cost schools more money than they will receive to implement corrective action. Superintendent Smith indicated it would depend on their plan.

Member Huntsman reported that every one of the ten districts he represents are in favor of the Board seeking the waiver, and indicated it would really hurt them if it is not granted. He expressed support for the waiver.

**MOTION TO AMEND** was made by Member Cummins and seconded by Member Warner that the Board apply for a one-year ESEA waiver, under the same conditions as the last waiver, without the condition of money from the legislature.

Member Stokes spoke against the motion to amend. He felt that by adding the piece about the legislative appropriation it allows the Board to involve the legislative body, and the appropriation would give the Board more flexibility in working with failing schools. Member Openshaw supported the idea of bringing new money into the system. Vice Chair Johnson also

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spoke against the amendment.

Member Cummins expressed a concern that with the legislative appropriation, the money would only be infused into the system for one year.

Motion to amend failed, with Member Cummins, Corry, Hansen, Huntsman and Warner in favor, and Members Allen, Belnap, Castle, Crandall, Johnson, Moss, Openshaw, Stokes, Thomas and Wright opposed.

Motion carried, with Members Allen, Castle, Corry, Hansen, Huntsman, Openshaw, Stokes, Thomas and Warner in favor, and Members Belnap, Crandall, Johnson, Moss and Wright opposed.

Member Stokes suggested that a letter be sent to the Executive Appropriations Committee outlining the action of the Board and again requesting the funding.

**Risk Mitigation Plan Update**

Associate Superintendent Bruce Williams gave an overview of the USOE Risk Mitigation Plan and presented a time line and status of work on the plan. Vice Chair Johnson distributed graphs showing the number of FTEs at the USOE and the number of local education agencies they serve.

Superintendent Williams reported that there are rent savings due to bonds on the building being paid off, and he suggested that the savings could be refocused to assist with risk mitigation. There is intent language being considered by the Public Education Appropriations Subcommittee to allow the use of that money for risk mitigation. The Board also approved the hiring of two additional auditors using one-time money. If more funding is appropriated the hope is to cover those costs using ongoing money.

Vice Chair Johnson emphasized the importance of the Board understanding the risks and time line of the risk mitigation, and ensuring that there is adequate response by the Board and Office.

Superintendent Williams noted that the first thing identified in the risk report is roles, responsibilities and communications, and it was noted that Superintendent Smith is working to give management a clear direction.

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Chair Crandall handed the gavel to Vice Chair Johnson and left the meeting. Vice Chair Thomas, Members Openshaw and Stokes, and Superintendent Smith also left the meeting for the purpose of participating in legislative meetings.

Member Warner asked where the discretionary funds approved for risk mitigation are listed in the USOE budget. Superintendent Williams responded that those funds are under the Administration area, but are not broken out. He indicated he could provide a report showing the breakdown of those funds.

Vice Chair Johnson asked Internal Auditor Debbie Davis for a description of risk assessment. Ms. Davis informed that risk assessment is a tool that management and internal auditors use. A risk assessment looks at an organization and identifies areas where there may be problems and opportunities that aren't being taken. Once a risk assessment is done management performs risk mitigation and the auditors determine where audits are needed. Risk assessments should be done on an annual basis. Mr. Williams reported that he and the internal auditors are working closely together to ensure they're moving forward on addressing the issues and hope to create an environment where risks are minimized.

Vice Chair Johnson asked what the responsibility of the Board is regarding the risks identified. Ms. Davis responded that the Board is charged with governance and is responsible for the use of funds. Ultimately assessing and monitoring risk is a management function which is delegated by the Board.

Vice Chair Johnson noted that the Board needs to reflect on what is has done to address concerns with respect to role clarity.

Member Moore expressed appreciation for the update on the plan. He noted that two things—a compensation plan and UCA monitoring system—have been accomplished since the plan came out last October. The rest of the work seems to be pending legislative appropriation, and he asked if there is an alternate plan for completing the work without the appropriation. He also questioned whether things could be done now without waiting on the resources.

Superintendent Williams responded that Superintendent Smith is taking the risk assessment very seriously, but many items are based on funding and would be very difficult to

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implement with additional funding. Deputy Superintendent Dickson also reported on Superintendent Smith's intention to conduct a zero-based budgeting and reprioritization process. More dialogue on that process will begin after the legislative session.

Mr. Williams also reported that the plan will be considered as the budgeting process for next fiscal year is conducted. It appears right now that there will be funding to address most of the problems. Some will be done through reallocation and some through additional funding.

Member Belnap asked how USOR is notifying the public of services they are no longer able to provide. Superintendent Williams reported that the biggest issue is with Vocational Rehabilitation services. Those clients already in the pipeline will still have services. It appears, based on information he has received, that there will be a legislative appropriation of $6.3 million for Vocational Rehabilitation, which would allow for continued services through the end of the fiscal year. This will be a temporary fix. The Board will have to consider whether USOR should accept federal reallotment funding.

Member Belnap reported that she has gotten calls from USOR clients indicating that their counselors are cancelling appointments and telling them not to come in. Stacy Cummins, USOR, explained that this shouldn't be happening. The USOR is on Order of Selection, but there are still pending services.

Vice Chair Johnson asked Board members to contact Board leadership with additional questions about USOR.

Member Moss left the meeting.

**Utah Professional Practices Advisory Commission Cases**

**MOTION** was made by Member Allen and seconded by Member Corry that the Board accept the UPPAC recommendation in Case No. 12-1105 and suspend the educator's Level 1 Secondary Education License for no less than three (3) years from the date of Board action pursuant to a stipulated agreement. Reinstatement, following a UPPAC hearing and recommendation, is subject to Board approval.

Motion carried; Members Crandall, Moss, Openshaw, Stokes and Thomas absent.

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**MOTION** was made by Member Allen and seconded by Member Corry that the Board accept the recommendation in UPPAC Case No. 13–1178 and suspend the educator's Level 2 Secondary and Career and Technical Education License for eighteen (18) months from August 1, 2014 pursuant to a stipulated agreement. Reinstatement, following a UPPAC hearing and recommendation, is subject to Board approval.

Without objection, the case was referred to Executive Session for discussion.

**Executive Session**

**MOTION** was made by Member Allen and seconded by Member Huntsman that the Board move into Executive Session for the purpose of discussing the character, professional competence, and physical or mental health of individuals. Upon voice vote of those Members present, the Board moved into Executive Session at 12:03 p.m.

Those present in Executive Session included Members Allen, Belnap, Castle, Corry, Cummins, Hansen, Huntsman, Jensen, Johnson, Moore, Tingey, Warner and Wright; and Sydnee Dickson, Lorraine Austin, Chris Lacombe, Nicole Call, Ben Rasmussen, Rachel Terry, and Nicole Ferguson.

Member Wright left the meeting.

**MOTION** was made by Member Huntsman and seconded by Member Cummins that the Board come out of Executive Session.

Motion carried. The Board reconvened in open meeting at 1:27 p.m.

**Executive Session Items**

UPPAC Cases

Motion to accept the UPPAC recommendation in Case No. 13-1178 failed, with Members Allen, Corry and Huntsman in favor, and Members Belnap, Castle, Cummins, Hansen, Johnson, and Warner opposed; Members Crandall, Moss, Openshaw, Stokes, Thomas and Wright absent.

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Appointments

**MOTION** was made by Member Hansen and seconded by Member Allen that the Board appoint Melissa Schindler to the State Rehabilitation Council and the Statewide Independent Living Council as the VR 121 representative.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

**Committee Reports**

**STANDARDS AND ASSESSMENT COMMITTEE**

Committee Chair Laura Belnap reported on the following items from the Committee.

R277-700-6 *The Elementary and Secondary School Core Curriculum - High School Requirements*

Rule R277-700-6 was amended to reflect changes the Board made in Utah high school graduation requirements, recognizing the General Financial Literacy course as an independent course separate from any core area, and adding a half unit of credit to the Social Studies graduation requirement. The Committee approved amendments to R277-700-6 on first reading.

**MOTION** from Committee that the Board approve R277-700-6 *The Elementary and Secondary School Core Curriculum - High School Requirements* on second reading.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

Social Studies Performance Standards Update

The Committee received a report regarding the revision process of the Secondary Social Studies Standards. Committee Chair Belnap thanked staff for their work on the standards.

The Committee asked for a one-page monthly summary from the USOE Teaching and Learning Section regarding standards revision.

Standards Review Committee Recommendations for Elementary Mathematics

The Committee received a report from the Standards Review Committee with recommendations for changes to the Elementary Mathematics Standards. A draft of the

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Standards will be presented in the May Board meeting.

The Committee gave direction to staff for additional changes to the Standards.

Standards Review Committee Recommendations for Secondary Mathematics

The Committee received a report from the Standards Review Committee with recommendations for changes to the Secondary Mathematics Standards. A draft of the Standards will be presented in the May Board meeting.

The Committee asked for a revised draft with particular focus on revising and aligning the Precalculus and Secondary I Honors, II Honors, and III Honors standards; revising and aligning the Statistics and Probability Standards across secondary courses; considering moving some of the standards in Secondary II to other courses; and revising ambiguous standards.

Utah Multi-Tiered System of Supports (UMTSS)

Two years ago the USOE received a five-year State Personnel Grant from the U.S. Department of Education to provide leadership and support for local education agencies in sustained implementation of evidence-based practices. Members of the UMTSS team provided the Committee with information about the grant and reviewed the progress of implementation.

**FINANCE COMMITTEE**

Committee Member Mark Huntsman reported on the following items from the Committee.

USOR Quarterly Budget Review

The committee received a budget report from the Utah State Office of Rehabilitation. The Committee requested that the USOR budget review be provided on a monthly basis.

R277-114 *Corrective Action and Withdrawal or Reduction of Program Funds*

The Committee reviewed R277-114 consistent with the Utah Administrative Rulemaking

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Act five-year review requirement.

The Committee approved on first reading continuation of R277-114 with an additional amendment to the rule as follows: Line 130 was changed to read, "The State Superintendent may withhold, reduce or terminate . . ."

**MOTION** from Committee that the Board approve continuation of R277-114 *Corrective Action and Withdrawal or Reduction of Program Funds*, and amendments to the rule, on second reading.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

FY 2015 USBE/USOE Budget Amendment

The Committee reviewed information about the USOE budget.

**MOTION** from Committee that the Board authorize hiring new internal auditors using the high end of the salary schedule analysis provided by the Board Internal Audit Director.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

**MOTION** from Committee that the Board authorize hiring a Financial Manager II in Internal Accounting using the rent savings in the Indirect Cost Pool.

Member Belnap asked if this is a new position, and Associate Superintendent Williams indicated that it is.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

It was reported that a demonstration/training will be provided to the Board in its April meeting regarding the BASE accounting system.

Finance Committee Requests for Data

The following requests for data were received by the Committee:

- An inventory of the services that the USOE provides to schools that aren't required by statute.
- A recommendation of software that may need to be purchased.
- A report on how much CDA and RDA money has been approved over the last ten to twenty years and the different types of projects that are being approved.

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- A report of the transportation percent paid to school districts and who determines the transportation rate.
- Regular budget workshops.
- Finalization of pupil accounting data.

Taxing Entity Committee Alternate Representative Appointment

**MOTION** from Committee that the Board appoint Daniel Ellis as the Board's alternate Taxing Entity Committee representative.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

**LAW AND LICENSING COMMITTEE**

Committee Member Terryl Warner reported on the following items from the Committee.

Addition or Change to Board Rule for Utah Schools for the Deaf and the Blind (USDB) Calculation of the Weighted Average Salary Adjustment (WASA) for USDB Educators (contracted) in Accordance with Utah Code 53A-25b-402

Utah Schools for the Deaf and the Blind Superintendent Joel Coleman spoke to the Committee regarding a proposal to add the USDB calculation of the weighted average salary adjustment (WASA) for USDB contracted educators to Board rule. The Board submits an annual proposal to the legislature; however, there is a two-year difference in the request, the availability of relevant data in mid-to-late-November, and the application of the wage adjustments. The formula for WASA is set forth in statute and the proposed rule would define the process.

A question was raised as to whether putting the calculation in rule would set a precedent for the need for additional rules regarding other financial computations. Assistant Attorney General Chris Lacombe was asked to provide research information to the Board on this issue, and to work with Superintendent Coleman to draft a rule for consideration at a future meeting.

R277-475 *Patriotic, Civic and Character Education*

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The Board reviewed R277-475 *Patriotic, Civic and Character Education* consistent with the Utah Administrative Rulemaking Act five-year review requirements, and reviewed suggested amendments from staff.

The Committee made additional amendments outlined on a distributed sheet. The Committee approved R277-475 for continuation and amendment on first reading,

**MOTION** from Committee that the Board approve continuation of R277-475 *Patriotic, Civic and Character Education*, and amendments to the rule, on second reading.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

R277-517-5 *Board and UPPAC Disciplinary Definitions and Actions—Board Disciplinary Actions*

The Committee reviewed proposed amendments to R277-517-5 to provide updated language for Board action against an educator for failure to respond to a complaint resulting in a default action, and an educator's failure to appear for a disciplinary hearing.

The Committee approved amendments to R277-517-5 on first reading.

**MOTION** from Committee that the Board approve R277-517-5 *Board and UPPAC Disciplinary Definitions and Actions—Board Disciplinary Action*, as amended, on second reading.

Member Corry asked if there was representation from the Utah Education Association at the Committee meeting. Member Warner responded that UEA was there and voiced some concerns about revocation. It was explained to them that there have been issues where the Board does not have the option to revoke the license of an educator who doesn't respond to the Utah Professional Practices Advisory Commission, but can only suspend the license for five years. This rule change provides greater flexibility to the Board.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

R277-516-3 *Education Employee Required Reports of Arrests and Required Background Check Policies for Non-licensed Employees—Licensed Public Education Employee Personal Reporting of Arrests*

The Committee reviewed proposed amendments to R277-516-3 to expand the requirements for licensed educator self-reporting from not only reports of arrest, but also

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citations and charges; and broadening of a list of specified offenses to report to make the offenses consistent with the educator ethics standards in R477-515.

The Committee approved the proposed amendments to R277-516-3, and additional amendments outlined on a distributed sheet, on first reading.

**MOTION** from Committee that the Board approve R277-516–3 *Education Employee Required Reports of Arrests and Required Background Check Policies for Non-licensed Employees—Licensed Public Education Employee Personal Reporting of Arrests*, as amended, on second reading.

Member Corry asked if the Utah Education Association was present in the Committee and was informed they were.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

R277-474 *School Instruction and Human Sexuality*

The Committee reviewed R277-474 consistent with the Utah Administrative Rulemaking Act five-year review requirement, and amendments suggested by staff. The Committee made additional amendments outlined on a distributed sheet.

The Committee approved on first reading continuation of and amendment to R277-474.

**MOTION** from Committee the Board approve R277-474 *School Instruction and Human Sexuality*, as amended, and continuation of the rule, on second reading.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

R277-459 *Teacher Supplies and Materials Appropriation*

The Committee reviewed R277-474 *Classroom Supplies Appropriation* consistent with the Utah Administrative Rulemaking Act five-year review requirement, and proposed amendments suggested by staff, including a change to the rule title. The Committee made an additional amendment on line 72 to change “shall” to “may.”

The Committee approved amendments to R277-474, and continuation of the rule, on first reading.

**MOTION** from Committee that the Board approve R277-474 *Teacher Supplies and*

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*Materials Appropriation*, as amended, and continuation of the rule, on second reading.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

Member Castle reminded the Board that there has been a discussion about rules being rewritten for specific style and other changes. Vice Chair Johnson reported that she has discussed the needs with Superintendent Smith, and he will work on it when the new Associate Superintendent starts.

University of Phoenix Utah Accreditation Update

In its December 5, 2014 meeting, the Board was informed that USOE placed the University of Phoenix Utah on probationary status, consistent with R277-502, due to a denial of accreditation from the Council for Accreditation of Education Preparation (CAEP).

The Committee was apprised that the University appealed the CAEP decision and the appeal was granted. Since the granting of the appeal places the University of Phoenix back in the status of being a candidate for accreditation, USOE is removing the probation. If the University of Phoenix is approved for accreditation, they will work with USOE to present their program to the Board for final approval.

**R277-404 *Requirements for Assessment of Student Achievement***

Associate Superintendent Judy Park reported that Senator Aaron Osmond has put forth legislation that would add additional language around parents being able to excuse their children from testing. In conversation with Senator Osmond and the Board, the Senator indicated that if the Board were to put the language into a Board rule, he would pull the language from his bill.

A draft of R277-404 *Requirements for Assessment of Student Achievement* was distributed. Superintendent Park reviewed the major amendments to the rule.

1. Parents must complete a form on an annual basis to exempt their children from testing. The reason it must be done annually is because schools systems aren't set up to carry information such as the opt out from year to year.

2. A consistent form must be used for opt out. Dr. Park expressed that a consistent form

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would provide clarity between parents and the school regarding for which specific assessments the opt out request is being made.

3. A requirement has been added that the school must receive the opt out form at least five days prior to the assessment. This will help ensure that parents wishes are implemented.

4) Consequences of a student opting out of a test are governed at the local level.

Member Hansen questioned whether the form would be a checklist of tests for which students could opt out. Dr. Park responded that a checklist would be challenging as there are different tests for each grade. She clarified that the rule only covers statewide assessments, and that it is a local decision how to handle opt out of other assessments.

Member Cummins pointed out that paragraphs A and C in Section 6 seem to contradict each other. Superintendent Park responded that the difference is in the consequences for students.

Member Castle stated she would support Section 6-A being removed, because she is not sure if parents are primarily responsible for their children's education—at least financially. Assistant Attorney General Chris Lacombe verified that it has been established in Utah statute that parents are primarily responsible for their children's education. He described paragraph A as preparatory language or an introduction. There is no legal requirement or obligation in paragraph A. Member Castle asked what the rights and duties of education entities are and questioned why those aren't stated in the beginning of the rule. Mr. Lacombe responded that state statute is couched in terms of parent rights.

Member Tingey commented that if a student is absent and then returns to school there are often makeup days. She asked how that should be addressed in the rule. Dr. Park suggested that the process outlined in the rule, with the parent filling out the form, would be that the way to handle that situation.

Member Cummins pointed out that if a parent keeps a child home rather than using the opt out process, there could be a significant number of absences along with the penalties associated.

Member Belnap suggested that lines 48 and 49 be changed to SAGE rather than just summative. SAGE would include both formative and summative tests. Dr. Park responded that

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the term "SAGE" is used for a variety of things including a tool teachers use to develop quizzes assignments test.

Member Belnap requested that the Board approve the opt out form, and suggested it be a simple checklist. She expressed concern over the requirement to submit the form five days prior to a test as it takes away flexibility for parents.

Members Moss and Wright joined the meeting by phone.

Member Huntsman expressed concern regarding the roll out of the rule, and felt it could be perceived that assessment isn't important to the Board. He asked whether district superintendents and other educators have been involved in the process.

Dr. Park responded that teachers use assessment data for a variety of purposes and can provide teachers with valuable information. The question is how to support both parents in their rights and educators in their tasks.

Member Hansen asked how quickly the Board will need to approve the rule in response to Senator Osmond's legislation. Vice Chair Johnson recommended passing the rule on first reading or first and second reading today and bringing it back for third reading in April. Dr. Park expressed her feeling that Senator Osmond would recognize that timeline as good faith.

Member Tingey felt there should be just one form for both state and local opt out.

Member Moss questioned whether Senator Osmond is comfortable with the rule. He also asked if local education agencies have concerns about assessment using the SAGE platform, and wondered if there will be any push back from LEAs by not allowing individual schools to opt out because of the Board's platform.

Superintendent Park reported that Senator Osmond is comfortable with the language. As far as what this would mean for formative assessments, the definition in the law is for state required assessments, which are formative. If that were to be broadened to teacher-created assessments it could mean any tests teachers give on a daily basis, and would be very problematic for schools and districts. It is within schools' and districts' purview to not participate in SAGE interim tests that are not required.

Without objection the discussion was tabled to allow for discussion of the Board retreat.

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**Board Retreat**

Dates were considered for a two-day strategic planning retreat for the Board in April. It was determined that the Board Secretary will send out a poll on dates.

Member Allen left the meeting.

**R277-404 Discussion continued**

Member Castle asked why, when students are opting out of a test, instruction must be provided for them during the time other students are taking the assessment, since other students are not receiving instruction then. She opined that parents that sign forms opting their children out of tests acknowledge that they understand what is being lost by opting out of the test.

**MOTION** was made by Member Belnap and seconded by Member Warner that the Board approve R277-404 *Requirements for Assessments of Student Achievement*, as amended, on first reading, and that the rule come back to the Standards and Assessment Committee in the Board's April meeting for further review and amendment.

Member Cummins asked that it be clarified that the rule only applies to state administered summative tests. Vice Chair Johnson reported that the rule was intentionally written with regard to state administered tests and was specifically drafted to allow for local policy to govern local assessments.

Member Wright left the meeting.

Member Corry commented that the DIBELS assessment is required by state law, and questioned whether parents opting out of DIBELS would be in violation of the law. Assistant A.G. Lacombe responded that it depends what is being considered. There is also a statute that gives parents the right to opt out of tests that are administered statewide. Language in line 220 of the rule was written to deal with some ambiguity as to what is a statewide test, and defines it as an "assessment mandated by the Board or state statute."

Member Hansen commented that by not including formative tests it gives control back to local education agencies.

Vice Chair Johnson indicated she will make a personal invitation to Senator Osmond to

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speak to the Standards and Assessment Committee in April, should the motion pass.

Member Warner asked for verification that Senator Osmond is comfortable with the language limiting the opt out to only a portion of SAGE tests. Dr. Park replied that he is comfortable with the portion in the rule regarding state mandated assessments. She is not sure if he has seen the language in Section 6-A regarding parent responsibility. Member Warner mentioned that the Senator's bill covers interim, formative, and summative tests and commented they are all connected to SAGE. She wondered if he would be comfortable with those not being included in the rule.

Member Huntsman asked when the rule would be implemented, and Dr. Park indicated probably fall 2015.

Member Moss verified that the rule can still be changed in the next meeting after talking with Senator Osmond.

Motion carried; Members Allen, Crandall, Openshaw, Stokes, Thomas and Wright absent.

**Legislative Items**

Associate Superintendent Bruce Williams distributed information and gave an update of the Board's legislative funding requests.

He reported that the $6.3 million for USOR was approved. Vice Chair Johnson suggested it would be important for the Governor to sign that bill as soon as possible so USOR services could be restored for this fiscal year.

Vice Chair Johnson acknowledged the work of staff during the session.

Dr. Dickson expressed thanks to members of the legislature who have reached out to the Board and USOE. She has had many personal opportunities to speak to them at length and they have been very engaging and good to work with.

**Audit Committee Report**

Vice Chair Johnson handed the gavel to Member Terryl Warner in to report on the Audit Committee meeting held March 19, 2015.

The Committee discussed role clarity, expectations and procedures and several other

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items including a report from School Children's Trust Section Director Tim Donaldson about potential land exchanges. She reiterated that any member of the Board can attend the Audit Committee, but it is preferred that advance notice is given. Board members may also receive materials received by the Audit Committee.

Vice Chair Johnson reported that following the Audit Committee meeting the Board received working papers with respect to audits that are pending the response of management.

Vice Chair Johnson took back the gavel.

**Update on Educator Effectiveness**

This item was postponed until next month.

**Superintendent's Report**

No report was given.

**Board Chair's Report**

Vice Chair Johnson reported on some things being discussed by the Board Executive Committee.

Chair Crandall has requested a legislative post-mortem at the next regular meeting.

It was reported that several Board members will be attending the National Association of State Boards of Education (NASBE) Legislative Conference March 22-23. They will also be visiting Utah's Congressional Delegation.

It was reported that NASBE will hold training for new Board members in the summer.

**Board Member Closing Comments**

Member Hansen questioned whether the Board will be meeting on March 19 as scheduled. Vice Chair Johnson indicated Board that members should make themselves available. The meeting will be held at the call of the Chair.

**Adjournment**

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**MOTION** to adjourn was made by Member Castle and seconded by Member Corry. Motion carried. The meeting adjourned at 3:36 p.m.

Lorraine Austin, Board Secretary

Minutes pending approval

| FY 2016 SCT Budget PROPOSAL | | | | | | | | | | | | | | | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| PERSONNEL w indirect | | | | | | | | | | | | | | | $535,768.83 |
| 2080 hrs/yr | | Ind. -> | $4,888.27 | $317.64 | | | | | | | | | | | |
| | | Couple -> | $10,079.00 | $589.86 | | | | | | | | | | | |
| | | Family -> | $13,455.85 | $1,074.01 | 0.60% | 6.20% | 1.45% | 0.25% | 0.88% | 23.70% | 5.27% | | 13.50% | | |
| EMPLOYEE | RATE | ANNUAL | HEALTH | DENTAL | DISABLT | FICA | MEDICARE | UNEMP | WKCMP | RETIRE | TERM | SUBTOTAL | INDIRECT | TOTAL | |
| 1.00 | 52.99 | 110,219.20 | 13,456.00 | 1074.00 | 661.32 | 6,833.59 | 1,598.18 | 275.55 | 969.93 | 26,121.95 | 5,808.55 | 167,054.92 | 22,552.41 | 189,607.34 | |
| 2.00 | 39.08 | 81,286.40 | 13,456.00 | 1074.00 | 487.72 | 5,039.76 | 1,178.65 | 203.22 | 715.32 | 19,264.88 | 4,283.79 | 127,026.39 | 17,148.56 | 144,174.96 | |
| 3.00 | 34.69 | 72,155.20 | 10,079.00 | 590.00 | 432.93 | 4,473.62 | 1,046.25 | 180.39 | 634.97 | 17,100.78 | 3,802.58 | 110,532.38 | 14,921.87 | 125,454.25 | |
| 4.00 | 21.61 | 44,948.80 | 4,888.00 | 318.00 | 269.69 | 2,786.83 | 651.76 | 112.37 | 395.55 | 10,652.87 | 2,368.80 | 67,429.32 | 9,102.96 | 76,532.28 | |
| TRAVEL | 5 SCC Trainings, 9 Compliance Reviews, 3 SITLA Tours, Prof Development | | | | | | | | | | | | | | $10,000.00 |
| PURCHASED SERVICES | sum of 13-20 | | | | | | | | | | | | | | $62,950.00 |
| Human Resources Services | USOE requirement | | | | | | | | | | | | | | $2,500.00 |
| Payroll Services | USOE requirement | | | | | | | | | | | | | | $250.00 |
| Wireless Communication Serv | | | | | | | | | | | | | | | $900.00 |
| Communication Services | Internet & Phones & Cell Reimb | | | | | | | | | | | | | | $4,500.00 |
| Postage and Mailing | | | | | | | | | | | | | | | $500.00 |
| Prof & Technical | Utah Interactive programming of www.schoollandtrust.org : $52,000 | | | | | | | | | | | | | | $52,000.00 |
| Required Technical References | Lexis Nexis $118.17/mo | | | | | | | | | | | | | | $1,500.00 |
| Rental of Land and Buildings | | | | | | | | | | | | | | | $800.00 |
| EQUIPMENT (computers, office furnishings, replace as/if needed) | | | | | | | | | | | | | | | $2,000.00 |
| SUPPLIES AND MATERIALS | sum of 23-30 | | | | | | | | | | | | | | $13,050.00 |
| Buildings and Grounds | USOE requirement | | | | | | | | | | | | | | $7,200.00 |
| Office Supplies | | | | | | | | | | | | | | | $500.00 |
| Printing and Binding | | | | | | | | | | | | | | | $250.00 |
| Photocopy | | | | | | | | | | | | | | | $200.00 |
| Insurance & Bonds | USOE requirement | | | | | | | | | | | | | | $1,500.00 |
| Membership Dues | AG & TD State Bar | | | | | | | | | | | | | | $1,200.00 |
| Conventions, Seminars, W, C | CFA, WSLCA, SCC Trainings | | | | | | | | | | | | | | $2,000.00 |
| Prof Dev & Training | Catered SITLA & SITFO Nom Committee meetings as necessary | | | | | | | | | | | | | | $200.00 |
| TOTAL INCOME | (Interest and Dividends Approp,) $606,100 Lines 145, 146 SB1, HB 8 Lines 1419 and 2452 | | | | | | | | | | | | | | $623,800.00 |
| TOTAL EXPENSE | | | | | | | | | | | | | | | $623,768.83 |
| DIFFERENCE | | | | | | | | | | | | | | | $31.17 |

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Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**DISCUSSION/ ACTION:** FY 2016 USOE/USDB Budget Process

---

**Background:**
In preparation for development of the USOE/USDB FY 2016 operating budgets, a process for budget development and timeline has been prepared by the Superintendency. This process includes detailed review of each line item within the budgets and significant involvement of the section directors in developing their section budgets.

**Key Points:**
The budget development process and timeline will be presented to the Finance Committee for discussion during the April Board Meeting.

**Anticipated Action:**
The Committee will review and approve the budget process and timeline.

**Contact:** Bruce Williams, Associate Superintendent, 801-538-7514
Brad Smith, State Superintendent of Public Instruction, 801-538-7510

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

# FY 16 Budget Preparation Process

## Proposed USOE/USDB Budget Timeline

| Date | Objectives |
|---|---|
| 4/13 | USOE Leadership Council - Discussion of Budgeting Process<br>* Section Director Requirements<br>* Presentation of proposed section budget to Superintendency & Board Members<br>* Budget prepared based on current section budget plus Legislative changes<br>* Section Objectives - Consistency with Board Objectives<br>* Discussion of how requested resources meet Section Objectives<br>* Line Item budget review<br>* FTE personnel review by position<br>* Retirements and other attrition and plans to fill open positions |
| 4/24-25 | Board Workshop - Determination of Board budget priorities and Objectives<br>* Risk Mitigation Plan - USOE & USOR<br>* Positions currently on one-time money moved to ongoing<br>* ? |
| 4/23-5/11 | Budget presentation and Justification by Section Directors and Accountants (18 - 20 meetings of at least 1 hour each) |
| 5/11 - 5/18 | Superintendency budget decisions and recommendations |
| 5/18 - 5/25 | Budget Document preparation by Internal Accounting |
| 6/1 | Final budget review by the Superintendency<br>Preliminary Budget sent to the Board for review |
| 6/18- 6/19 | Board Budget Workshop |
| 6/25 | Finance Committee Review of Budget |
| 6/26 | Board Approval of Budget |
| 7/1 | Fiscal Year begins |

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** FY2016 USOE\USOR Indirect Cost Rate Proposal Timeline

---

**Background:**
The Internal Auditor for the Utah State Board of Education recommended that the Utah State Office of Education change the way the Indirect Cost Rates were calculated in an audit presented to the Audit Committee of the Utah State Board of Education on February 19, 2015. Historically, the Utah State Office of Education calculated the Indirect Cost Rates and entered into an agreement with the U.S. Department of Education using a restricted rate as prescribed by them.

For the 2016 indirect cost plan, USOE Internal Accounting has begun the process of developing one indirect cost pool and rate for the Utah State Office of Education and one for the Utah State Office of Rehabilitation. This is consistent with the recommendation from the Internal Auditor that USOE should use the multiple allocation base method. Initial discussions have begun with the U.S. Department of Education concerning this revision to the FY 16 Indirect Cost Plan.

**Key Points:**
The Indirect Cost Rate Proposal timeline will be presented to the Finance Committee for discussion during the April Board Meeting.

**Anticipated Action:**
The Finance Committee will review and consider approval\acceptance of the Indirect Cost Rate Proposal process and timeline.

**Contact:** Bruce Williams, Associate Superintendent, 801-538-7514
Gary Belliston, Internal Accounting Director, 801-538-7627

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

# Timeline for FY 16 Indirect Cost Proposal

| Date & Description | Responsible Party |
|---|---|
| March 4, 2015<br>Telephone conference with the Indirect Cost Group of the US Dept of Education.<br>to request technical asssistance and discuss the FY 2016 proposal calculation. | Accounting, Internal Audit, US Dept of Ed |
| March 24, 2015<br>Questionnaires developed and sent to staff proposed to be included in the indirect cost pool<br>to establish job functions and allocations. | Accounting |
| April 19, 2015<br>Questionnaires completed and returned to Accounting. | Accounting, other affected sections of<br>USOE and USOR |
| April 20, 2015<br>Begin review of questionnaires and develop FY2016 proposal with technical assistance<br>from the US Dept of Education. | Accounting |
| May 15, 2015<br>Complete calculation of FY2016 proposal. | Accounting |
| May 18, 2015<br>Begin management review of FY2016 proposal.<br>Implement new cost codes for tracking new cost areas of FY2016 proposal. | USOE Superintendency, USOR management,<br>Internal Audit, Accounting |
| June 25 & 26, 2015<br>State Board review and approval Indirect Cost Rates for FY2016 proposal. | Finance Committee, State Board |
| June 29, 2015<br>Submit FY2016 proposal to US Dept of Education for review and approval. | Accounting, US Dept of Ed |
| September 30, 2015<br>Apply FY2016 approved rates. | USOE & USOR accountants |

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** Taxing Entity Committee (TEC) Representatives

---

**Background:**
The State Board of Education is charged with appointing one representative to serve on each taxing entity committee per Utah Code Annotated §17C-1-402 (2), *Taxing Entity Committee*, specifically, 17C-1-402 (D) "one representative appointed by the State Board of Education . . . to represent the interests of those taxing entities on the taxing entity committee." Traditionally, the Board has also appointed an alternate representative.

**Key Points:**
In its March 6, 2015 meeting, the Board appointed Daniel Ellis, USOE School Finance Auditor, as the alternate TEC representative. Daniel has since accepted a position with another agency and is no longer employed with the USOE.

Consistent with the Board's Redevelopment Agency/Taxing Entity Committee Procedures, the superintendent is recommending that Natalie Grange be appointed as the Board's representative with Bruce Williams, Associate Superintendent, as the alternate.

**Anticipated Action:**
The Finance Committee will consider the appointment of the Board's representative and alternate to taxing entity committees for 2015, and if approved, will forward that recommendation to the full board for approval.

**Contact:** Bruce Williams, Associate Superintendent, 801-538-7514
Natalie Grange, School Finance Director, 801-538-7668

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**DISCUSSION/ACTION:** Pupil Accounting

---

**Background:**
During the February meeting of the Board Finance Committee, there was a discussion concerning pupil accounting and its relationship to funding of local education agencies (LEAs). The Finance Committee requested that staff provide information to the committee concerning several issues as noted below.

- Make privacy of student records the responsibility of the enrolling entity (LEA) in rule.
- Identify disparities that policy incentives are posing for students.
- Provide a copy of the Executive Summary of the R277-419-9 hearing prepared by Assistant Attorney General Chris Lacombe to identify and consider additional concerns brought up regarding distance and online education programs.
- Verify if a district can charter a school and be funded in the same manner as a charter and whether statute or rule allow for funding to happen in the same way or differently.
- Provide information on how other states approach funding charter schools and online courses.
- Add more content to the LEA Funding Task Force Recommendations to provide more explanation of how the recommendations came about.
- Pull out the recommendations and anything the Task Force addressed and compare with what has been studied by the Public Education Appropriations Subcommittee.
- Discussion is also needed on "enrollment" definition, "attendance" definition, and the responsibility of LEAs, parents, teachers and students.

**Key Points:**

- There are still questions outstanding regarding the accounting of pupils receiving education services in traditional and non-traditional settings.
- As the Board moves forward to make decisions about pupil accounting, it will be helpful to work from a set of guiding principles.

**Anticipated Action:**
The Finance Committee will receive information from staff concerning issues raised during the February meeting and continue to discuss guiding principles for pupil accounting.

**Contact:** Jennifer Johnson, Second Vice Chair, 801-742-1616
Bruce Williams, Associate Superintendent, 801-538-7514

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

# Performance Audit 2013-02
# "Distance and Online Education Programs in Utah Schools"

**Has been studied or addressed?**

## Chapter 2: Student Records and Security

| | | |
|---|---|---|
| 2B-1 | We recommend that the Board, or designee, review the security of student enrollment data being transmitted and stored by LEAs and their contractors, and consider adopting a best practice or minimum recommendations regarding the security, transmission, and disclosure of sensitive student data. | Partially addressed in R277-419-9 |

## Chapter 3: Core Standards, Licensed Educators, Assessments, and Membership

### *Distance and Online Programs Managed by LEAs*

| | | |
|---|---|---|
| 3B-1 | We recommend that LEAs develop and document a procedure to evaluate and approve curriculum and virtual courses purchased from a vendor and administered by a vendor teacher for compliance with to R277-700 and Utah Core Standards. | No |
| 3B-2 | We recommend that the Board determine if licensure and background check laws and rule (*Utah Code* 53A-1a-512.5 and 53A-3-410 and R277-520) apply to vendor provided teachers who provide support and instruction for online classes purchased from a vendor.<br><br>We further recommend that the Board modify existing Board rules to clarify expectations for LEAs for vendor provided teachers. | No |
| 3B-3 | We recommend that the Board or its designee revise Rule 277-419 to provide specific guidance on required school days and instructional hours, and the 10-day rule and its application to virtual or online classes. We recommend the Board consider allowing a progress based policy established by an LEA for online | No |

| | | |
|---|---|---|
| | programs. A progress based policy could be used as a measure to determine compliance with membership standards and could be monitored and documented using existing management systems.<br><br>Additionally, we recommend the Board or its designee communicate all changes in R277-419 to the State Auditor's Office for inclusion in the State Legal Compliance Guide. | |
| 3B-4 | We recommend that the Board evaluate virtual classes and determine how competency based measures and membership funding apply to these classes. We recommend the Board provide guidance to the USOE and LEAs regarding funding and membership rules for these courses. | No |
| 3B-5 | We recommend that the Board or its designee review the practice of leasing or renting computers and providing subsidies for internet access to elementary students and determine if this practice complies with provisions of the Utah Constitution and Board rule requiring elementary education to be free. | Partially addressed in R277-419-9 |
| 3B-6 | We recommend that the Board and the Assessment division review and develop specific guidance in the USOE's Testing Ethics Policy to address appropriate practices for the administration of required assessments for distance and online classrooms. Guidance should include who can administer the required state assessments and how to facilitate assessments in distance or online classrooms. | No |
| | ***Distance and Online Programs Managed by Contractors on Behalf of LEAs*** | |
| 3B-7 | We recommend that the Board determine if licensure and background check laws and rule (*Utah Code* 53A-1a-512.5 and 53A-3-410 and R277-520) apply to vendor-provided teachers who provide support and instruction for online classes purchased from a | No |

| | | |
|---|---|---|
| | vendor, or to teachers that are hired by LEA contractors. We further recommend that the Board modify existing Board rules to clarify expectations for LEA for vendor provided teachers. | |
| 3B- 8 | We recommend that the Board evaluate law and rule regarding home school courses and the ability of LEAs to claim home school courses for funding. We recommend the Board provide guidance to LEAs and USOE staff to clarify if these courses quality for state funding, how these course should be recorded in an SIS, and potentially establish minimum standard to govern this decision. We recommend the Board consider the provisions of 53A-1-409 in their review of this issue. | No |
| 3B-9 | We recommend that the Board or its designee revise R277-419 to provide specific guidance on required school days and instructional hours, and the 10-day rule and its application to virtual or online classes. We recommend the Board consider developing minimum standards or a framework to allow a progress measurement to be used to determine compliance with, or as an alternative to the 10-day rule for online schools or virtual classes. A progress based policy could be used as a measure to determine compliance with membership standards and could be monitored and documented using existing management systems.<br><br>Additionally, we recommend the Board or its designee communicate all changes in R277-419 to the State Auditor's Office for inclusion in the State Legal Compliance Guide. | No |
| 3B-10 | We recommend that the Board evaluate virtual classes and determine how competency based measures and membership funding apply to these classes. We recommend the Board provide guidance to the USOE and LEAs regarding funding and membership rules for these courses. | No |
| 3B-11 | We recommend that the Board or its designee review the practice of reimbursing parents for an education or tech allowance or course material reimbursements in a distance or online education program to determine if | Partially addressed in R277-419-9 |

| | | |
|---|---|---|
| | these reimbursements and/or incentives are appropriate and provide for equity among school programs. The Board should consider creating a rule to establish acceptable parameters and allowable terms or uses of reimbursements and incentives to ensure that all students are given an equal opportunity and assistance with their education goals and that public funds are expended appropriately. | |
| 3B-12 | We recommend that the Board and the Assessment division review and develop specific guidance in the USOE's Testing Ethics Policy to address appropriate practices for the administration of required assessments for distance and online classrooms. Guidance should include who can administer the required state assessments, how to facilitate assessments in distance or online classrooms, and adequate test security. | No |
| 3B-13 | We recommend that the Assessment and Data and Statistic divisions develop data audit procedures to investigate student's schedules in correlation to their taken assessments to verify if students are enrolled in appropriate courses specific to grade level and determine if all required assessments were administered. | No |

## Chapter 4: Funding Formulas

| | | |
|---|---|---|
| 4B-1 | We recommend that the Board or its designee review R277-419 and modify the rule or develop a new rule that clarifies the following areas pertaining to membership and funding in virtual schools or online classes:<br><br>1) Are virtual schools/students subject to the 180 days, 990 instructional hour provisions?<br>2) Does the 10-day rule apply to virtual students? Is there a suitable substitute such as a progress measure?<br>3) Are virtual schools required to offer a minimum of 2 hours of instruction for kindergarten, and 4 hours for grades 1-12 per day?<br>4) Are online courses that are mastery based, not seat time based, to be valued the same for funding as courses taught in a school? | No |

5) Should a minimum number of courses or hours be required to claim a full WPU?
6) How do LEAs share the WPU in dual enrollment situation when full time enrollment may not be the same in each LEA?

| | | |
|---|---|---|
| 4B-2 | We recommend that the Board study the method by which charter schools are funded based on 53A-1a-513(3)(b). The Board could consider developing rules to require a funding reconciliation of October 1 headcounts to actual year end ADM in charters to ensure that students are not generating more than one WPU for regular school attendance, and that charters do not receive full funding for students who do not attend a full school year. We recommend that the Board consider acceptable variances from ADM for charters schools enrolling at their maximum authorized capacity to allow for growth in charter schools so as not to cause irreparable financial hardships to charters. The Board could also seek to modify law to bring the funding formulas for school districts and charters schools into alignment. | Discussed by Task Force August – November 2014 |
| 4B-3 | We recommend the Board evaluate 53A-1-409 and consider seeking modifications to the law or developing Board rule to require that competency-based programs must either be approved by the Board, or follow a set of minimum standards approved by the Board. | No |
| 4B-4 | We recommend the Board determine how to address existing competency based programs and courses, including whether LEAs can continue to claim these programs and courses for membership hours and corresponding funding in the absence of a competency based funding formula. | No |

## Chapters 5: Other Matters

| | | |
|---|---|---|
| 5B-1 | We recommend that the Board and the SCSB ensure that LEAs are following all applicable state laws and their charter when establishing contracts. | Low |

| | | |
|---|---|---|
| 5B-2 | We recommend that the Teaching and Learning and the School Finance divisions of the USOE determine if non LEA employees are being included in the various MSP funding calculations related to teacher licensure and credentials, the monetary impact if they are included, and provide this information to the Board. | Low |
| 5B-3 | We recommend that the Board determine if non LEA employees should generate funding through the various MSP programs and modify existing Board rules to govern this decision. | Low |
| 5B-4 | We recommend that the Teaching and Learning division develop data audit procedures to investigate students being assigned to teachers with expired licenses, or licenses and endorsements not appropriate for the grade level or subject. | Low |
| 5B-5 | We recommend that the Teaching and Learning division provide guidance on how non- LEA employees should be reflected in CACTUS for funding purposes and make recommendations to the Board for changes to rules. | Low |
| 5B-7 | We recommend that the SCSB continue to provide training to the charter schools regarding student suspension, expulsion, and removal from charter school programs to ensure compliance with 53A-11-903 and 904 and ensure student and parent rights are protected and observed. | Moderate |
| 5B-8 | We recommend that the Board, the SCSB, and the Data and Statistics division develop clear guidance on the appropriate use of SIS exit codes, and provide instructions to charters on how to comply with compulsory education law. | |

# Summary of Items Discussed and Recommendations
# LEA Funding and Rule 277-419 Taskforce

**Taskforce Timeline:**

- The taskforce met weekly from 7/17/14 to 10/7/14
- Total of thirteen meetings of approximately 2 hours each
- Report to the Finance Committee was made on 10/7/14

**Issues discussed by the group include:**

- Charter School and District WPU Funding
- Online Education Funding
- Competency Based Funding

**Members of the Taskforce:**

Dixie Allen, Laura Belnap, Christopher Bleak, Aaron Brough, Marlies Burns, Keith Buswell, Judi Clark, Steve Crandall, Phil Dean, Craig Frank, Kim Frank, Natalie Grange, Dan Griffiths, Heather Groom, Patti Harrington, Howard Headlee, Gavin Hutchinson, Brian Ipson, Brad Last, Ben Leishman, Jefferson Moss, Patty Murphy, Erin Preston, Randy Raphael, David Roberts, Robert Smith, Howard Stephenson, DeLaina Tonks, Royce Van Tassell, Bruce Williams, McKell Withers and Jacob Wright.

**Items and Options Discussed:**

**Option 1 -** Allow the sunset under 53A-17a-513(3)(b) at the end of the 2014-15 school year to take effect and fund all LEAs on ADM plus growth Rationale – As per current statute, at the end of FY 2015, Charter Schools would move from the current WPU funding formula of the greater of prior year ADM plus growth or October headcount to the same formula used to fund school districts. All LEAs would have K-12 WPUs calculated based on prior year ADM plus growth.

**Implications** - $5.8 million reduction to Charter School Funding.

**Discussion in the Committee** - Due to the financial impact on Charter Schools, discussion as to how the funding loss could be mitigated was discussed. Additionally, discussion was held as to why all LEAs could not be moved to the same methodology as Charter Schools thus eliminating the need to reduce funding for Charter Schools under the sunset in the current statute.

**Option 2** – Allow sunset provision to take effect and use the amount of reduced funds to increase the Charter School Administrative Cost amount per student.

**Implications** – No net effect on total funding distributed to Charter Schools.

**Discussion in the Committee** – Redistribution of funds within Charter Schools. Schools with a larger difference in the correlation between prior year ADM and October 1 headcount would

lose money and charters with a small difference between ADM and October count would gain money.

**Option 3** – Allow sunset provision - Use the amount of reduced funds to create a consistent declining scale administrative cost formula for Districts and Charters based on student count

**Implications** – Charter Schools currently receive $100 per student for administrative costs without a limit to how many students are funded in any given Charter School. Districts are funded for Administrative Costs based on a declining scale of WPUs until a District hits a student population of 5,000 students. Any district with more than 5,000 students receives no funding under the Administrative Cost Formula.

**Discussion in the Committee** – By revising the administrative cost programs for Charters and Districts into one consistent declining scale, many small districts would have a reduction in funds. Including a declining scale for administrative costs would result in small charter schools receiving additional funds and larger charter schools losing funds as they get closer to the cap. Additionally, some Charter Schools which are approaching the 5,000 student cap currently imposed on School Districts would not receive administrative funding for students above the 5,000 student cap.

**Option 4** - Move the current funding model permanently into code.

**Implications** – There would be no impact to current charter school funding. As the number of charter schools continues to grow, the approximate $5.3 million difference in funding between the formulas used to fund district and charter schools will continue to grow. Dual enrollment between charters and districts is very difficult to account for when the two types of schools are using a different funding formula.

**Discussion in the Committee** – Charters schools would like to remain on the current greater of prior year ADM plus growth or October 1 headcount formula. Districts are of the opinion that allowing this formula for Charters and not Districts is discriminatory and is unacceptable on a long-term basis.

**Option 5** - Move all LEAs to the greater of prior year ADM plus growth or October 1 headcount.

**Implications** –Analysis provided to the committee showed that if all LEAs were changed to the greater of ADM plus growth or October 1 headcount formula for K-12 WPUs that it would cost the State approximately $64 million in additional ongoing revenue.

**Discussion in the Committee** – The committee favored this option because it would not reduce charter school funding and would put all LEAs on the same K-12 WPU funding formula. Based on the $64 million price tag, the committee knew that this proposal would be a difficult sell to the Legislature without other changes in MSP programs to offset the additional cost or propose another revenue stream to pay for the additional $64 million required appropriation.

**Option 6** - Option 5 plus eliminate Flexible Allocation and Class Size Reduction funding to cover the additional cost of moving all LEAs to October headcount.

**Implications** –A suggestion was made by a committee member that we look at the implications of eliminating the Flexible Allocation and Class Size Reduction Programs and use the appropriations for those two programs to make up for the $64 million additional cost. Because charter schools share in each of the two programs which were suggested to be eliminated, this option would reduce funding for charters and shift funding to school districts.

**Discussion in the Committee** – Due to the shift of revenue, this option did not get much discussion as a viable option from the committee.

**Option 7** – Option 5 plus adjust Local Replacement Funding to offset the cost of moving all LEAs to higher of prior year ADM plus growth or October 1 headcount.

**Implications** –We reviewed the impact of moving all LEAs to the greater of ADM plus growth or October headcount and pay the $64 million additional cost through moving funds from the Charter School Local Replacement Program. This would result in an increase in funding for school districts and a reduction of $64 million to charter schools.

**Discussion in the Committee** – Due to the shift of revenue, this option did not get much discussion as a viable option from the committee.

**Option 8** – Option 5 plus holding the Basic Minimum Tax Rate constant to fund a portion of the Local Replacement Funding Formula.

**Implications** –In this option, we investigated combining moving all LEAs to the greater of ADM plus growth or October headcount and finding a new revenue source to fund the additional $64 million in cost. Other options looked at shifting revenue between programs which results in winners and losers. This option considered freezing the Basic Rate and using the revenues received from the increased tax rate to offset a portion of the cost of moving to October headcount.

**Discussion in the Committee** –This option results in no reduction in revenues to Charter Schools and an increase in funding to districts. Holding the Basic Rate Constant would generate approximately $10 million in additional revenue so it would require a significant additional appropriation from the Education Fund to finance this option.

**Option 9** – Option 5 plus change the Local Replacement Program so that Districts pay 100 percent of actual per student amount into the program. Also, move Student Transportation funds to be included in the WPU allocation.

**Implications** –In this option, we investigated combining moving all LEAs to the greater of ADM plus growth or October headcount and having districts pay 100 percent of the actual per

student amount received in the tax rates taken into account in the Local Replacement Program. Additionally, this option looked at moving the funding currently provided to the To and From School Transportation program above the line to be included in the WPU value. This option would result in Districts which have high concentrations of charter school students living within their boundaries to pay significantly more toward Charter School Local Replacement.

**Discussion in the Committee** –Under this option Districts would have to contribute more into the Local Replacement Program which may result in tax increases. Moving the funding for the Student Transportation program into the value of the WPU would reallocate funding from Districts to Charters. This change would have a significant impact on student transportation in the State.

**Option 10** – Option 5 plus WPU Flex eliminated - Class Size Reduction eliminated.

**Implications** –In this option, we investigated combining moving all LEAs to the greater of ADM plus growth or October headcount, eliminating the Flexible Allocation and Class Size Reduction appropriations and using that funding to fund the $64 million cost increase. Since Charter Schools participate in both funding formulas which would be reallocated, it would result in a funding reduction to Charter Schools.

**Discussion in the Committee** – Because of the funding reallocation resulting from this option, the committee came to the conclusion that this was not a viable option.

**Option 11** - Greater of prior year ADM plus growth or October 1 and March 1 headcount for all LEAs in the K-12 Program, Local Replacement paid by Districts at 100 percent of actual per student amount, and Student Transportation funds included in the WPU allocation with a differentiation formula.

**Implications** –This option included combining several programs previously considered in other options to pay the additional cost of moving to October 1 headcount for all LEAs while at the same time reducing a program which only funds districts and have districts fund a higher percentage of Charter Local Replacement funding from local tax revenues.

**Discussion in the Committee** – Additionally, removing the Transportation Formula funding would negatively impact rural districts required to transport students over greater distances than urban districts.

**Option 12** - The higher of Prior Year ADM plus growth or the average of October 1 headcount and February 1 headcount. Districts contribute 100 percent of actual tax generation into the Local Replacement Fund and Charter Schools have access to Special Transportation funding.

**Implications** –This option results in Districts having to pay more local property tax revenues into the Charter School Replacement Funding program. It may require Districts to raise taxes to fund the program. State funds no longer needed to fund the LRF would be used to finance the

additional cost in moving all LEAs to October 1 headcount. Some Charter Schools provide transportation services and would like to have access to State Transportation funds.

**Discussion in the Committee** –Districts currently receiving Special Transportation Funding would receive a reduction. Most of these districts are rural and are required to transport students long distances for activities and athletic competitions. Districts were concerned about having to raise taxes to fund Local Replacement Funding program.

**Option 13** - Combine all programs containing State Funding excluding Special Education and School Land Trust and distributing funds on a per pupil basis.

**Implications** –This option results in significant redistribution of funds between LEAs and has a negative impact on equity. Programs which provide funding to assist schools with different student populations such as Necessarily Existent Small Schools would have a large loss in funding.

**Discussion in the Committee** – Because of the funding reallocation resulting from this option, the committee came to the conclusion that this was not a viable option.

**Option 14** – Move all LEAs to the greater of prior year ADM plus growth or current year headcount and have two student counts, one in October and one in February.

**Implications** –This option results in a reduction in the amount necessary to fund the K-12 program in comparison to just an October headcount. District funding is reduced from what would be necessary under a single count date and Charters would lose funds from the current allocation method but less than moving to prior year ADM plus growth.

**Discussion in the Committee** – This option would still require a large addition appropriation from the Education Fund to make it happen and would be politically difficult to implement. Charter Schools would still receive a reduction from current funding levels.

**Option 15** - Funding all LEAs in the K-12 Program based on the higher of Prior Year ADM plus growth or the average of October 1 headcount and use a three year phase in to mitigate the cost rather than full implementation in year 1.

**Implications** –Although this option would allow for the additional $64 million cost to be phased in over three years, it would require an additional $21.3 million to be funded each year. This would result in a limit on new funding to all schools at an amount that would be equivalent to 1 percent in the WPU each year.

**Discussion in the Committee** – Based on the difficulty in funding this option over three years, this option was not considered to be viable.

**Option 16** - Delay the sunset on current funding model and take the time to develop a new finance formula to replace the current Minimum School programs.

**Implications** –This option would take significant time and effort to review and modify current finance formulas. It is estimated that this process would take several years to complete.

**Discussion in the Committee** – Although most agreed that a full review of the funding formulas under the Minimum School Programs is warranted, many were of the opinion that waiting until a full review is complete is appropriate given the sunset date at the end of fiscal year 2015.

## Recommendations from the Taskforce

- Increase the Basic Rate or provide authority for the State Board of Education to implement a tax levy to fund the Charter School Local Replacement program and amounts needed to provide equalization efforts for some districts.
    - Districts would be required to offset current rates by the amount that they are currently contributing to the Local Replacement program.
    - Provide funding to increase all districts generating less than the LRF average up to the current $1,081 or the LRF funding amount established for future years net of capital and debt service.
- Effective for the 2015-16 fiscal year, all LEAs will be funded in the K-12 program at the higher of prior year ADM plus growth or October 1 headcount.
    - The additional cost would be funded through an increase in the Basic Rate and/or
    - The additional revenues currently appropriated by the Legislature from the Education Fund for the Local Replacement program if the new State Board tax levy described in item #1 above is implemented to fully fund the Local Replacement program.
- If item #2 is not approved, extend the sunset for one year allowing Charter Schools to be funded based on the greater of prior year ADM plus growth or October 1 headcount.
- Regardless of whether the above noted items are approved, the current Task Force members will continue to meet to discuss:
    - Minimum School Funding Formulas
    - LEA funding for online learning
    - LEA funding for competency based education

**2011-2013 Enrollment Change, Charter Schools**

| | Students | Schools |
|---|---|---|
| Schools with declining enrollment | (825) | 24 |
| Schools with increasing enrollment | 6,257 | 54 |
| Sub-Total | 5,432 | 78 |
| Schools new in 2012 or 2013 | 4,576 | 12 |
| Total Change | 10,008 | |
| Percent Change | 22% | |

**2011-2013 Enrollment Change, School Districts**

| | Students | Districts |
|---|---|---|
| Districts with declining enrollment | (592) | 11 |
| Districts with increasing enrollment | 15,390 | 30 |
| Total Change | 14,798 | 41 |
| Percent Change | 2.7% | |

**2011-2013 Enrollment Change, Statewide**

| | |
|---|---|
| Total Change | 24,806 |
| Percent Change | 4.2% |

**2011 - 2013 Fall Enrollment by Charter School**
*Sorted by 2011 to 2013 Percent Change*

| LEA ID | Charter School | Fall Enrollment Total | | | 2011 - 2013 Change | |
|---|---|---|---|---|---|---|
| | | Oct 1 2011 | Oct 1 2012 | Oct 1 2013 | Students | Percent |
| 8E | MERIT COLLEGE PREPARATORY ACADEMY | 601 | 597 | 257 | (344) | -57.2% |
| 6C | LIBERTY ACADEMY | 460 | 423 | 383 | (77) | -16.7% |
| 5G | QUAIL RUN PRIMARY SCHOOL | 538 | 339 | 452 | (86) | -16.0% |
| 2F | ROCKWELL CHARTER HIGH SCHOOL | 594 | 698 | 535 | (59) | -9.9% |
| 6D | NOAH WEBSTER ACADEMY | 586 | 598 | 536 | (50) | -8.5% |
| 2G | VISTA AT ENTRADA SCHOOL OF PERFORMIN | 862 | 843 | 799 | (63) | -7.3% |
| 7E | GATEWAY PREPARATORY ACADEMY | 652 | 674 | 631 | (21) | -3.2% |
| 9B | NAVIGATOR POINTE ACADEMY | 533 | 525 | 518 | (15) | -2.8% |
| 9G | ALIANZA ACADEMY | 468 | 502 | 457 | (11) | -2.4% |
| 5F | UTAH VIRTUAL ACADEMY | 2,000 | 2,051 | 1,956 | (44) | -2.2% |
| 3E | CS LEWIS ACADEMY | 459 | 456 | 449 | (10) | -2.2% |
| 2D | CHANNING HALL | 669 | 675 | 658 | (11) | -1.6% |
| 93 | JOHN HANCOCK CHARTER SCHOOL | 188 | 184 | 185 | (3) | -1.6% |
| A8 | EAST HOLLYWOOD HIGH | 313 | 325 | 309 | (4) | -1.3% |
| 2E | KARL G MAESER PREPARATORY ACADEMY | 626 | 614 | 619 | (7) | -1.1% |
| 4E | DUAL IMMERSION ACADEMY | 442 | 425 | 437 | (5) | -1.1% |
| 86 | PINNACLE CANYON ACADEMY | 520 | 526 | 517 | (3) | -0.6% |
| A4 | SUMMIT ACADEMY | 1,003 | 1,001 | 998 | (5) | -0.5% |
| 95 | TIMPANOGOS ACADEMY | 438 | 447 | 437 | (1) | -0.2% |
| 9D | CANYON RIM ACADEMY | 529 | 530 | 528 | (1) | -0.2% |
| 8F | HAWTHORN ACADEMY | 813 | 813 | 811 | (2) | -0.2% |
| A6 | NORTH DAVIS PREPARATORY ACADEMY | 1,009 | 1,018 | 1,008 | (1) | -0.1% |
| 7B | REAGAN ACADEMY | 675 | 675 | 674 | (1) | -0.1% |
| 68 | OGDEN PREPARATORY ACADEMY | 1,042 | 1,025 | 1,041 | (1) | -0.1% |
| 3G | BEAR RIVER CHARTER SCHOOL | 180 | 180 | 180 | 0 | 0.0% |
| 6F | EARLY LIGHT ACADEMY AT DAYBREAK | 751 | 750 | 752 | 1 | 0.1% |
| 8D | OPEN CLASSROOM | 384 | 380 | 385 | 1 | 0.3% |
| 8C | MOUNTAINVILLE ACADEMY | 747 | 749 | 750 | 3 | 0.4% |
| 4D | SYRACUSE ARTS ACADEMY | 1,021 | 1,024 | 1,026 | 5 | 0.5% |
| A2 | RANCHES ACADEMY | 362 | 364 | 364 | 2 | 0.6% |
| 7F | EXCELSIOR ACADEMY | 679 | 678 | 683 | 4 | 0.6% |
| 83 | ACADEMY FOR MATH ENGINEERING & SCIEN | 484 | 489 | 491 | 7 | 1.4% |
| 7C | MONTICELLO ACADEMY | 741 | 751 | 752 | 11 | 1.5% |
| 5E | EDITH BOWEN LABORATORY SCHOOL | 296 | 304 | 304 | 8 | 2.7% |
| 5B | NORTH STAR ACADEMY | 510 | 510 | 527 | 17 | 3.3% |
| 1B | UTAH COUNTY ACADEMY OF SCIENCE (UCAS | 388 | 397 | 402 | 14 | 3.6% |
| 1D | RENAISSANCE ACADEMY | 679 | 678 | 714 | 35 | 5.2% |
| 1C | ODYSSEY CHARTER SCHOOL | 506 | 537 | 536 | 30 | 5.9% |
| 2B | LINCOLN ACADEMY | 643 | 645 | 684 | 41 | 6.4% |
| 1E | GUADALUPE SCHOOL | 126 | 127 | 135 | 9 | 7.1% |
| 1G | OQUIRRH MOUNTAIN CHARTER SCHOOL | 711 | 783 | 762 | 51 | 7.2% |
| 5C | LEGACY PREPARATORY ACADEMY | 993 | 1,092 | 1,073 | 80 | 8.1% |
| A9 | SUCCESS ACADEMY | 347 | 370 | 375 | 28 | 8.1% |
| 98 | FAST FORWARD HIGH | 220 | 229 | 238 | 18 | 8.2% |
| 6G | WEILENMANN SCHOOL OF DISCOVERY | 535 | 587 | 580 | 45 | 8.4% |
| 9E | PROVIDENCE HALL | 1,416 | 1,465 | 1,543 | 127 | 9.0% |
| 8B | AMERICAN LEADERSHIP ACADEMY | 1,523 | 1,741 | 1,681 | 158 | 10.4% |
| 4B | WASATCH PEAK ACADEMY | 375 | 375 | 416 | 41 | 10.9% |
| 4G | MARIA MONTESSORI ACADEMY | 490 | 491 | 544 | 54 | 11.0% |
| 5D | GEORGE WASHINGTON ACADEMY | 921 | 985 | 1,024 | 103 | 11.2% |
| 94 | THOMAS EDISON - LEA | 1,178 | 1,220 | 1,315 | 137 | 11.6% |
| 2C | INTECH COLLEGIATE HIGH SCHOOL | 161 | 155 | 181 | 20 | 12.4% |
| 4F | SALT LAKE CENTER FOR SCIENCE EDUCATIO | 335 | 348 | 378 | 43 | 12.8% |

| | | | | | |
|---|---|---|---|---|---|
| 8G GOOD FOUNDATION ACADEMY | 413 | 447 | 468 | 55 | 13.3% |
| 87 CITY ACADEMY | 207 | 218 | 235 | 28 | 13.5% |
| 90 TUACAHN HIGH SCHOOL FOR THE PERFORM | 333 | 365 | 381 | 48 | 14.4% |
| 9C PARADIGM HIGH SCHOOL | 561 | 523 | 644 | 83 | 14.8% |
| A5 ITINERIS EARLY COLLEGE HIGH | 254 | 238 | 297 | 43 | 16.9% |
| A3 DAVINCI ACADEMY | 935 | 1,094 | 1,097 | 162 | 17.3% |
| 9F OPEN HIGH SCHOOL OF UTAH | 328 | 334 | 389 | 61 | 18.6% |
| 89 SOLDIER HOLLOW CHARTER SCHOOL | 246 | 289 | 295 | 49 | 19.9% |
| A1 NO UT ACAD FOR MATH ENGINEERING & SCI | 448 | 502 | 548 | 100 | 22.3% |
| 1F QUEST ACADEMY | 753 | 902 | 951 | 198 | 26.3% |
| 4C LAKEVIEW ACADEMY | 727 | 841 | 931 | 204 | 28.1% |
| 97 SALT LAKE ARTS ACADEMY | 300 | 300 | 390 | 90 | 30.0% |
| 81 WALDEN SCHOOL OF LIBERAL ARTS | 338 | 537 | 443 | 105 | 31.1% |
| 7D SALT LAKE SCHOOL FOR THE PERFORMING | 220 | 236 | 292 | 72 | 32.7% |
| 3D SPECTRUM ACADEMY | 404 | 488 | 542 | 138 | 34.2% |
| 92 UINTAH RIVER HIGH | 55 | 65 | 74 | 19 | 34.5% |
| 82 FREEDOM ACADEMY | 697 | 768 | 955 | 258 | 37.0% |
| 3F VENTURE ACADEMY | 488 | 598 | 724 | 236 | 48.4% |
| A7 MOAB CHARTER SCHOOL | 78 | 105 | 116 | 38 | 48.7% |
| 7G SUMMIT ACADEMY HIGH SCHOOL | 284 | 615 | 499 | 215 | 75.7% |
| 74 AMERICAN PREPARATORY ACADEMY--LEA | 1,862 | 2,322 | 3,430 | 1,568 | 84.2% |
| 3C ENTHEOS ACADEMY | 523 | 1,012 | 1,036 | 513 | 98.1% |
| 3H ENDEAVOR HALL | 299 | 579 | 614 | 315 | 105.4% |
| 3B BEEHIVE SCIENCE & TECHNOLOGY ACADEM | 138 | 230 | 294 | 156 | 113.0% |
| 2H UTAH CONNECTIONS ACADEMY | 279 | 449 | 689 | 410 | 147.0% |
| 4H Aristotle Aca | 0 | 258 | 220 | 220 | NA |
| 7H Pacific Heritage | 0 | 451 | 397 | 397 | NA |
| 8H Valley Arts | 0 | 440 | 419 | 419 | NA |
| 6H Promontory School | 0 | 452 | 464 | 464 | NA |
| 5H High Mark | 0 | 567 | 677 | 677 | NA |
| 9H Pioneer High | 0 | 208 | 479 | 479 | NA |
| 1I UT International | 0 | 0 | 104 | 104 | NA |
| 3I Open Leadership | 0 | 0 | 450 | 450 | NA |
| 4I Mana | 0 | 0 | 650 | 650 | NA |
| 5I Voyage | 0 | 0 | 500 | 500 | NA |
| 7I WSU | 0 | 0 | 41 | 41 | NA |
| 9I UT Career Path | 0 | 0 | 175 | 175 | NA |
| Charter Total: | 44,892 | 50,801 | 54,900 | 10,008 | 8.1% |

NA = Not applicable.

**2011 - 2013 Fall Enrollment by School District**
*Sorted by 2011 to 2013 Percent Change*

| LEA ID | District | Fall Enrollment Total | | | 2011 - 2013 Change | |
|---|---|---|---|---|---|---|
| | | Oct 1 2011 | Oct 1 2012 | Oct 1 2013 | Students | Percent |
| 34 | Wayne | 539 | 525 | 501 | (38) | -7.05% |
| 23 | Piute | 317 | 308 | 304 | (13) | -4.10% |
| 24 | Rich | 491 | 481 | 479 | (12) | -2.44% |
| 39 | Logan | 6,120 | 6,063 | 5,987 | (133) | -2.17% |
| 5 | Carbon | 3,423 | 3,435 | 3,369 | (54) | -1.58% |
| 37 | Ogden | 12,652 | 12,570 | 12,489 | (163) | -1.29% |
| 3 | Box Elder | 11,273 | 11,001 | 11,131 | (142) | -1.26% |
| 11 | Grand | 1,467 | 1,441 | 1,455 | (12) | -0.82% |
| 20 | North Sanpete | 2,420 | 2,377 | 2,408 | (12) | -0.50% |
| 15 | Juab | 2,297 | 2,283 | 2,287 | (10) | -0.44% |
| 9 | Emery | 2,313 | 2,311 | 2,310 | (3) | -0.13% |
| 36 | Salt Lake | 23,919 | 23,759 | 23,965 | 46 | 0.19% |
| 40 | Murray | 6,417 | 6,428 | 6,435 | 18 | 0.28% |
| 10 | Garfield | 927 | 948 | 930 | 3 | 0.32% |
| 12 | Granite | 67,736 | 67,600 | 68,106 | 370 | 0.55% |
| 41 | Canyons | 33,490 | 33,528 | 33,674 | 184 | 0.55% |
| 21 | North Summit | 983 | 977 | 990 | 7 | 0.71% |
| 26 | Sevier | 4,546 | 4,629 | 4,585 | 39 | 0.86% |
| 17 | Millard | 2,815 | 2,782 | 2,841 | 26 | 0.92% |
| 27 | South Sanpete | 3,124 | 3,189 | 3,162 | 38 | 1.22% |
| 7 | Davis | 67,736 | 68,342 | 68,573 | 837 | 1.24% |
| 35 | Weber | 30,423 | 30,732 | 31,028 | 605 | 1.99% |
| 13 | Iron | 8,508 | 8,519 | 8,685 | 177 | 2.08% |
| 2 | Beaver | 1,540 | 1,544 | 1,579 | 39 | 2.53% |
| 28 | South Summit | 1,457 | 1,468 | 1,495 | 38 | 2.61% |
| 4 | Cache | 15,605 | 15,890 | 16,038 | 433 | 2.77% |
| 16 | Kane | 1,175 | 1,209 | 1,212 | 37 | 3.15% |
| 30 | Tooele | 13,675 | 14,034 | 14,107 | 432 | 3.16% |
| 25 | San Juan | 2,922 | 3,064 | 3,020 | 98 | 3.35% |
| 33 | Washington | 26,206 | 26,131 | 27,099 | 893 | 3.41% |
| 14 | Jordan | 50,581 | 52,043 | 52,855 | 2,274 | 4.50% |
| 19 | Nebo | 29,724 | 30,494 | 31,230 | 1,506 | 5.07% |
| 22 | Park City | 4,400 | 4,421 | 4,630 | 230 | 5.23% |
| 1 | Alpine | 68,233 | 70,811 | 72,419 | 4,186 | 6.13% |
| 38 | Provo | 13,779 | 14,202 | 14,799 | 1,020 | 7.40% |
| 31 | Uintah | 6,993 | 7,291 | 7,591 | 598 | 8.55% |
| 18 | Morgan | 2,421 | 2,531 | 2,632 | 211 | 8.72% |
| 8 | Duchesne | 4,574 | 4,829 | 5,021 | 447 | 9.77% |
| 32 | Wasatch | 5,253 | 5,585 | 5,786 | 533 | 10.15% |
| 6 | Daggett | 169 | 181 | 194 | 25 | 14.79% |
| 29 | Tintic | 210 | 228 | 250 | 40 | 19.05% |
| | **DISTRICT TOTAL:** | **542,853** | **550,184** | **557,651** | **14,798** | **2.73%** |

**FY2013 Average Daily Membershp/Fall Enrollment**

| | 10-1-2012 Fall Enroll. | FY13 ADM | FY13 ADM/FE |
|---|---|---|---|
| **Statewide** | 600,985 | 581,346 | 96.7% |

| | | 10-1-2012 Fall Enroll. | FY13 ADM | FY13 ADM/FE |
|---|---|---|---|---|
| | **All Charters** | 50,801 | 48,928 | 96.3% |
| 68 | Ogden Preparatory Academy | 1,025 | 995.739 | 97.1% |
| 74 | American Preparatory Academy | 2,322 | 2242.744 | 96.6% |
| 81 | Walden School Of Liberal Arts | 537 | 511.327 | 95.2% |
| 82 | Freedom Academy | 768 | 737.889 | 96.1% |
| 83 | Academy For Math Engineering & | 489 | 482.016 | 98.6% |
| 86 | Pinnacle Canyon Academy | 526 | 472.622 | 89.9% |
| 87 | City Academy | 218 | 192.206 | 88.2% |
| 89 | Soldier Hollow Charter School | 289 | 279.089 | 96.6% |
| 90 | Tuacahn High School For The Pe | 365 | 351.945 | 96.4% |
| 92 | Uintah River High | 65 | 55.756 | 85.8% |
| 93 | John Hancock Charter School | 184 | 178.822 | 97.2% |
| 94 | Thomas Edison - North | 1,220 | 1184.496 | 97.1% |
| 95 | Timpanogos Academy | 447 | 419.039 | 93.7% |
| 97 | Salt Lake Arts Academy | 300 | 300.055 | 100.0% |
| 98 | Fast Forward High | 229 | 218.673 | 95.5% |
| A1 | NUAMES | 502 | 487.478 | 97.1% |
| A2 | Ranches Academy | 364 | 360.288 | 99.0% |
| A3 | Davinci Academy | 1,094 | 1006.961 | 92.0% |
| A4 | Summit Academy | 1,001 | 997.256 | 99.6% |
| A5 | Itineris Early College High | 238 | 233.073 | 97.9% |
| A6 | North Davis Preparatory Academ | 1,018 | 991.944 | 97.4% |
| A7 | Moab Community School | 105 | 104.401 | 99.4% |
| A8 | East Hollywood High | 325 | 306.523 | 94.3% |
| A9 | Success Academy | 370 | 361.067 | 97.6% |
| 1B | UCAS | 397 | 387.461 | 97.6% |
| 2B | Lincoln Academy | 645 | 629.929 | 97.7% |
| 3B | Beehive Science & Technology A | 230 | 219.095 | 95.3% |
| 4B | Wasatch Peak Academy | 375 | 373.205 | 99.5% |
| 5B | North Star Academy | 510 | 507.644 | 99.5% |
| 7B | Reagan Academy | 675 | 667.194 | 98.8% |
| 8B | American Leadership Academy | 1,741 | 1677.466 | 96.4% |
| 9B | Navigator Pointe Academy | 525 | 512.589 | 97.6% |
| 1C | Odyssey Charter School | 537 | 507.733 | 94.5% |
| 2C | Intech Collegiate High School | 155 | 155.039 | 100.0% |
| 3C | Entheos Academy | 1,012 | 986.671 | 97.5% |
| 4C | Lakeview Academy | 841 | 814.656 | 96.9% |
| 5C | Legacy Preparatory Academy | 1,092 | 1070.893 | 98.1% |
| 6C | Liberty Academy | 423 | 401.288 | 94.9% |
| 7C | Monticello Academy | 751 | 732.434 | 97.5% |
| 8C | Mountainville Academy | 749 | 731.306 | 97.6% |
| 9C | Paradigm High School | 523 | 507.095 | 97.0% |
| 1D | Renaissance Academy | 678 | 658.595 | 97.1% |
| 2D | Channing Hall | 675 | 659.105 | 97.6% |
| 3D | Spectrum Academy | 488 | 435.372 | 89.2% |
| 4D | Syracuse Arts Academy | 1,024 | 1002.811 | 97.9% |
| 5D | George Washington Academy | 985 | 957.749 | 97.2% |
| 6D | Noah Webster Academy | 598 | 573.017 | 95.8% |
| 7D | Salt Lake School For The Perforn | 236 | 224.406 | 95.1% |

| | 10-1-2012 Fall Enroll. | FY13 ADM | FY13 ADM/FE |
|---|---|---|---|
| **All Districts** | 550,184 | 532,418 | 96.8% |
| Alpine | 70,811 | 68,713.200 | 97.0% |
| Beaver | 1,544 | 1,531.111 | 99.2% |
| Box Elder | 11,001 | 10,614.044 | 96.5% |
| Cache | 15,890 | 15,375.845 | 96.8% |
| Carbon | 3,435 | 3,296.506 | 96.0% |
| Daggett | 181 | 178.940 | 98.9% |
| Davis | 68,342 | 66,132.518 | 96.8% |
| Duchesne | 4,829 | 4,567.601 | 94.6% |
| Emery | 2,311 | 2,231.150 | 96.5% |
| Garfield | 948 | 922.227 | 97.3% |
| Grand | 1,441 | 1,371.728 | 95.2% |
| Granite | 67,600 | 64,796.949 | 95.9% |
| Iron | 8,519 | 8,312.518 | 97.6% |
| Jordan | 52,043 | 50,501.710 | 97.0% |
| Juab | 2,283 | 2,198.628 | 96.3% |
| Kane | 1,209 | 1,192.367 | 98.6% |
| Millard | 2,782 | 2,737.755 | 98.4% |
| Morgan | 2,531 | 2,492.156 | 98.5% |
| Nebo | 30,494 | 29,479.528 | 96.7% |
| No. Sanpete | 2,377 | 2,260.100 | 95.1% |
| No. Summit | 977 | 971.212 | 99.4% |
| Park City | 4,421 | 4,350.044 | 98.4% |
| Piute | 308 | 300.977 | 97.7% |
| Rich | 481 | 473.550 | 98.5% |
| San Juan | 3,064 | 3,010.906 | 98.3% |
| Sevier | 4,629 | 4,545.067 | 98.2% |
| So. Sanpete | 3,189 | 3,080.433 | 96.6% |
| So. Summit | 1,468 | 1,462.962 | 99.7% |
| Tintic | 228 | 229.633 | 100.7% |
| Tooele | 14,034 | 13,510.972 | 96.3% |
| Uintah | 7,291 | 7,026.888 | 96.4% |
| Wasatch | 5,585 | 5,505.988 | 98.6% |
| Washington | 26,131 | 25,684.983 | 98.3% |
| Wayne | 525 | 504.711 | 96.1% |
| Weber | 30,732 | 29,809.756 | 97.0% |
| Salt Lake | 23,759 | 22,549.710 | 94.9% |
| Ogden | 12,570 | 12,029.822 | 95.7% |
| Provo | 14,202 | 13,401.255 | 94.4% |
| Logan | 6,063 | 5,913.051 | 97.5% |
| Murray | 6,428 | 6,254.922 | 97.3% |
| Canyons | 33,528 | 32,894.771 | 98.1% |

| | | 10-1-2012 Fall Enroll. | FY13 ADM | FY13 ADM/FE |
|---|---|---|---|---|
| | **All Charters** | 50,801 | 48,928 | 96.3% |
| 8D | Open Classroom | 380 | 361.113 | 95.0% |
| 9D | Canyon Rim Academy | 530 | 523.522 | 98.8% |
| 1E | Guadalupe School | 127 | 117.156 | 92.2% |
| 2E | Karl G Maeser Preparatory Acade | 614 | 582.518 | 94.9% |
| 3E | CS Lewis Academy | 456 | 430.622 | 94.4% |
| 4E | Dual Immersion Academy | 425 | 413.906 | 97.4% |
| 5E | Edith Bowen Laboratory School | 304 | 300.239 | 98.8% |
| 7E | Gateway Preparatory Academy | 674 | 652.545 | 96.8% |
| 8E | Merit College Preparatory Acader | 597 | 526.572 | 88.2% |
| 9E | Providence Hall | 1,465 | 1453.715 | 99.2% |
| 1F | Quest Academy | 902 | 859.922 | 95.3% |
| 2F | Rockwell Charter High School | 698 | 683.283 | 97.9% |
| 3F | Venture Academy | 598 | 572.933 | 95.8% |
| 4F | Salt Lake Center For Science Edu | 348 | 348.139 | 100.0% |
| 5F | Utah Virtual Academy | 2,051 | 1960.198 | 95.6% |
| 6F | Early Light Academy At Daybreak | 750 | 731.528 | 97.5% |
| 7F | Excelsior Academy | 678 | 658.894 | 97.2% |
| 8F | Hawthorn Academy | 813 | 796.938 | 98.0% |
| 9F | Open High School Of Utah | 334 | 286.134 | 85.7% |
| 1G | Oquirrh Mountain Charter School | 783 | 749.433 | 95.7% |
| 2G | Vista At Entrada School Of Perfor | 843 | 811.068 | 96.2% |
| 3G | Bear River Charter School | 180 | 176.333 | 98.0% |
| 4G | Maria Montessori Academy | 491 | 456.927 | 93.1% |
| 5G | Quail Run Primary School | 339 | 343.084 | 101.2% |
| 6G | Weilenmann School Of Discovery | 587 | 563.089 | 95.9% |
| 7G | Summit Academy High School | 615 | 601.262 | 97.8% |
| 8G | Good Foundation Academy | 447 | 423.894 | 94.8% |
| 9G | Alianza Academy | 502 | 471.274 | 93.9% |
| 2H | Utah Connections Academy | 449 | 450.001 | 100.2% |
| 3H | Endeavor Hall | 579 | 556.617 | 96.1% |
| 4H | Aristotle Aca | 258 | 220.717 | 85.5% |
| 5H | High Mark | 567 | 539.744 | 95.2% |
| 6H | Promontory School | 452 | 446.154 | 98.7% |
| 7H | Pacific Heritage | 451 | 369.905 | 82.0% |
| 8H | Valley Arts | 440 | 417.49 | 94.9% |
| 9H | Pioneer High | 208 | 206.95 | 99.5% |

| | 10-1-2012 Fall Enroll. | FY13 ADM | FY13 ADM/FE |
|---|---|---|---|
| **All Districts** | 550,184 | 532,418 | 96.8% |

ADM = Average Daily Membership
FE = Fall Enrollment

***FY14 Prior-Year ADM plus Fall Enrollment Growth Scenario***

*Grade-Level Factors Retained*

| ID | LEA | Current | Scenario | Current | Scenario - Percent | Fall Enroll. Change | Grade Range |
|---|---|---|---|---|---|---|---|
| | **Statewide:** | $152,440,322 | $148,858,000 | ($3,582,322) | -2.3% | 8.1% | K-12 |
| 68 | OGDEN PREPARATORY ACADEM | 2,737,062 | 2,658,925 | (78,137) | -2.9% | 1.6% | K-9 |
| 74 | AMERICAN PREPARATORY ACAI | 9,245,405 | 8,976,232 | (269,173) | -2.9% | 48.5% | 9-12 |
| 81 | WALDEN SCHOOL OF LIBERAL A | 1,431,610 | 1,431,610 | 0 | 0.0% | -17.5% | 7-12 |
| 82 | FREEDOM ACADEMY | 2,510,679 | 2,412,246 | (98,433) | -3.9% | 24.3% | K-12 |
| 83 | ACADEMY FOR MATH ENGINEER | 1,708,091 | 1,683,693 | (24,398) | -1.4% | 0.4% | K-12 |
| 86 | PINNACLE CANYON ACADEMY | 1,507,336 | 1,377,950 | (129,386) | -8.6% | -0.6% | K-12 |
| 87 | CITY ACADEMY | 781,600 | 689,118 | (92,482) | -11.8% | 7.8% | K-5 |
| 89 | SOLDIER HOLLOW CHARTER SC | 735,360 | 710,139 | (25,221) | -3.4% | 2.1% | K-8 |
| 90 | TUACAHN HIGH SCHOOL FOR TI | 1,325,423 | 1,278,021 | (47,402) | -3.6% | 4.4% | K-9 |
| 92 | UINTAH RIVER HIGH | 257,431 | 220,820 | (36,611) | -14.2% | 13.8% | K-6 |
| 93 | JOHN HANCOCK CHARTER SCH( | 470,218 | 456,981 | (13,237) | -2.8% | 0.5% | K-6 |
| 94 | THOMAS EDISON - LEA | 3,364,086 | 3,266,193 | (97,893) | -2.9% | 7.8% | 7-12 |
| 95 | TIMPANOGOS ACADEMY | 1,109,535 | 1,063,933 | (45,602) | -4.1% | -2.2% | K-8 |
| 97 | SALT LAKE ARTS ACADEMY | 1,064,187 | 1,064,188 | 1 | 0.0% | 30.0% | 9-12 |
| 98 | FAST FORWARD HIGH | 827,954 | 790,615 | (37,339) | -4.5% | 3.9% | K-9 |
| A1 | NO UT ACAD FOR MATH ENGINE | 1,739,400 | 1,695,840 | (43,560) | -2.5% | 0.0% | 6-12 |
| A2 | RANCHES ACADEMY | 896,950 | 887,804 | (9,146) | -1.0% | 0.0% | K-9 |
| A3 | DAVINCI ACADEMY | 3,082,507 | 2,837,251 | (245,256) | -8.0% | 0.3% | 9-12 |
| A4 | SUMMIT ACADEMY | 2,562,020 | 2,560,113 | (1,907) | -0.1% | -0.2% | K-11 |
| A5 | ITINERIS EARLY COLLEGE HIGH | 1,033,204 | 1,011,815 | (21,389) | -2.1% | 24.8% | K-8 |
| A6 | NORTH DAVIS PREPARATORY A( | 2,635,974 | 2,593,988 | (41,986) | -1.6% | -1.0% | K-6 |
| A7 | MOAB CHARTER SCHOOL | 281,348 | 279,742 | (1,606) | -0.6% | 10.5% | K-10 |
| A8 | EAST HOLLYWOOD HIGH | 1,074,949 | 1,066,333 | (8,616) | -0.8% | -4.9% | K-8 |
| A9 | SUCCESS ACADEMY | 1,304,550 | 1,273,049 | (31,501) | -2.4% | 1.4% | 9-12 |
| 1B | UTAH COUNTY ACADEMY OF SC | 1,398,478 | 1,364,869 | (33,609) | -2.4% | 1.3% | K-8 |
| 2B | LINCOLN ACADEMY | 1,840,605 | 1,811,640 | (28,965) | -1.6% | 6.9% | K-9 |
| 3B | BEEHIVE SCIENCE & TECHNOLO | 901,966 | 859,200 | (42,766) | -4.7% | 27.8% | 7-12 |
| 4B | WASATCH PEAK ACADEMY | $1,013,346 | 1,008,493 | (4,853) | -0.5% | 10.9% | K-9 |
| 5B | NORTH STAR ACADEMY | 1,400,537 | 1,394,062 | (6,475) | -0.5% | 3.3% | K-12 |

| | | | | | | |
|---|---|---|---|---|---|---|
| 7B REAGAN ACADEMY | 1,713,077 | 1,695,779 | (17,298) | -1.0% | -0.1% | K-9 |
| 8B AMERICAN LEADERSHIP ACADEI | 4,829,618 | 4,819,466 | (10,152) | -0.2% | -3.4% | K-9 |
| 9B NAVIGATOR POINTE ACADEMY | 1,344,267 | 1,330,224 | (14,043) | -1.0% | -1.3% | K-8 |
| 1C ODYSSEY CHARTER SCHOOL | 1,305,129 | 1,236,302 | (68,827) | -5.3% | -0.2% | K-8 |
| 2C INTECH COLLEGIATE HIGH SCH( | 629,819 | 629,819 | 0 | 0.0% | 16.8% | K-8 |
| 3C ENTHEOS ACADEMY | 2,724,219 | 2,656,049 | (68,170) | -2.5% | 2.4% | K-8 |
| 4C LAKEVIEW ACADEMY | 2,410,027 | 2,334,542 | (75,485) | -3.1% | 10.7% | 10-12 |
| 5C LEGACY PREPARATORY ACADEI | 2,821,510 | 2,815,970 | (5,540) | -0.2% | -1.7% | K-9 |
| 6C LIBERTY ACADEMY | 1,010,947 | 1,010,945 | (2) | 0.0% | -9.5% | K-9 |
| 7C MONTICELLO ACADEMY | 1,979,842 | 1,933,474 | (46,368) | -2.3% | 0.0% | 9-12 |
| 8C MOUNTAINVILLE ACADEMY | 1,934,068 | 1,888,391 | (45,677) | -2.4% | 0.1% | 10-12 |
| 9C PARADIGM HIGH SCHOOL | 2,097,891 | 2,034,095 | (63,796) | -3.0% | 20.5% | K-9 |
| 1D RENAISSANCE ACADEMY | 1,808,803 | 1,757,035 | (51,768) | -2.9% | 5.3% | K-8 |
| 2D CHANNING HALL | 1,669,172 | 1,669,172 | 0 | 0.0% | -2.5% | K-9 |
| 3D SPECTRUM ACADEMY | 1,574,244 | 1,404,476 | (169,768) | -10.8% | 11.1% | 10-12 |
| 4D SYRACUSE ARTS ACADEMY | 2,679,836 | 2,624,395 | (55,441) | -2.1% | 0.1% | K-9 |
| 5D GEORGE WASHINGTON ACADEM | 2,567,471 | 2,496,427 | (71,044) | -2.8% | 4.0% | K-8 |
| 6D NOAH WEBSTER ACADEMY | 1,399,603 | 1,399,602 | (1) | 0.0% | -10.4% | K-9 |
| 7D SALT LAKE SCHOOL FOR THE PE | 1,015,810 | 965,906 | (49,904) | -4.9% | 23.7% | K-9 |
| 8D OPEN CLASSROOM | 980,355 | 931,631 | (48,724) | -5.0% | 1.3% | K-9 |
| 9D CANYON RIM ACADEMY | 1,289,621 | 1,285,991 | (3,630) | -0.3% | 0.0% | K-9 |
| 1E GUADALUPE SCHOOL | 326,862 | 301,528 | (25,334) | -7.8% | 6.3% | 9-12 |
| 2E KARL G MAESER PREPARATORY | 2,021,878 | 1,918,205 | (103,673) | -5.1% | 0.8% | K-5 |
| 3E CS LEWIS ACADEMY | 1,110,607 | 1,065,148 | (45,459) | -4.1% | -0.2% | K-6 |
| 4E DUAL IMMERSION ACADEMY | 1,071,789 | 1,043,820 | (27,969) | -2.6% | 2.8% | K-8 |
| 5E EDITH BOWEN LABORATORY SC | 744,464 | 735,253 | (9,211) | -1.2% | 0.0% | K-9 |
| 7E GATEWAY PREPARATORY ACAD | 1,681,929 | 1,681,930 | 1 | 0.0% | -6.4% | K-8 |
| 8E MERIT COLLEGE PREPARATORY | 1,768,223 | 1,768,222 | (1) | 0.0% | -57.0% | 9-12 |
| 9E PROVIDENCE HALL | 4,242,782 | 4,242,782 | 0 | 0.0% | 6.4% | K-6 |
| 1F QUEST ACADEMY | 2,435,247 | 2,321,638 | (113,609) | -4.7% | 5.4% | K-6 |
| 2F ROCKWELL CHARTER HIGH SCH | 2,221,500 | 2,221,501 | 1 | 0.0% | -23.4% | K-9 |
| 3F VENTURE ACADEMY | 2,079,685 | 1,992,503 | (87,182) | -4.2% | 21.1% | 9-12 |
| 4F SALT LAKE CENTER FOR SCIENC | 1,186,574 | 1,186,572 | (2) | 0.0% | 8.6% | K-8 |
| 5F UTAH VIRTUAL ACADEMY | 5,632,122 | 5,632,122 | 0 | 0.0% | -4.6% | K-6 |
| 6F EARLY LIGHT ACADEMY AT DAYI | 1,974,451 | 1,925,820 | (48,631) | -2.5% | 0.0% | K-12 |
| 7F EXCELSIOR ACADEMY | 1,722,296 | 1,681,200 | (41,096) | -2.4% | 0.0% | K-9 |
| 8F HAWTHORN ACADEMY | 2,128,533 | 2,094,209 | (34,324) | -1.6% | 0.0% | K-8 |
| 9F OPEN HIGH SCHOOL OF UTAH | 1,303,333 | 1,116,553 | (186,780) | -14.3% | 16.5% | K-12 |
| 1G OQUIRRH MOUNTAIN CHARTER | 1,939,923 | 1,907,930 | (31,993) | -1.6% | -2.7% | K-8 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 2G | VISTA AT ENTRADA SCHOOL OF | 2,081,109 | 2,081,108 | (1) | 0.0% | -5.2% | 9-12 |
| 3G | BEAR RIVER CHARTER SCHOOL | 457,983 | 448,658 | (9,325) | -2.0% | 0.0% | K-10 |
| 4G | MARIA MONTESSORI ACADEMY | 1,358,849 | 1,267,127 | (91,722) | -6.7% | 11.0% | K-8 |
| 5G | QUAIL RUN PRIMARY SCHOOL | 1,091,592 | 1,091,595 | 3 | 0.0% | 33.3% | K-6 |
| 6G | WEILENMANN SCHOOL OF DISC | 1,481,708 | 1,438,504 | (43,204) | -2.9% | -1.2% | K-8 |
| 7G | SUMMIT ACADEMY HIGH SCHOO | 2,091,670 | 2,091,669 | (1) | 0.0% | -18.9% | 7-12 |
| 8G | GOOD FOUNDATION ACADEMY | 1,146,990 | 1,087,702 | (59,288) | -5.2% | 4.7% | K-11 |
| 9G | ALIANZA ACADEMY | 1,190,916 | 1,190,918 | 2 | 0.0% | -8.6% | 7-12 |
| 2H | UTAH CONNECTIONS ACADEMY | 2,032,778 | 2,032,779 | 1 | 0.0% | 53.5% | 6-12 |
| 3H | ENDEAVOR HALL | 1,551,197 | 1,491,234 | (59,963) | -3.9% | 6.0% | K-12 |
| 4H | Aristotle Aca | 539,897 | 539,895 | (2) | 0.0% | -14.7% | K-8 |
| 5H | High Mark | 1,827,936 | 1,740,058 | (87,878) | -4.8% | 19.4% | K-7 |
| 6H | Promontory School | 1,188,069 | 1,177,916 | (10,153) | -0.9% | 3.1% | 9-12 |
| 7H | Pacific Heritage | 1,036,973 | 966,202 | (70,771) | -6.8% | -11.8% | K-8 |
| 8H | Valley Arts | 1,041,496 | 1,037,741 | (3,755) | -0.4% | -4.8% | K-12 |
| 9H | Pioneer High | 1,666,345 | 1,657,929 | (8,416) | -0.5% | 130.3% | K-8 |
| 1I | UT International | 328,312 | 328,312 | 0 | 0.0% | NA | 7-10 |
| 3I | Leadership | 1,091,908 | 1,091,908 | 0 | 0.0% | NA | K-6 |
| 4I | Mana | 1,717,716 | 1,717,715 | (1) | 0.0% | NA | K-12 |
| 5I | Voyage | 1,223,378 | 1,223,378 | 0 | 0.0% | NA | K-6 |
| 7I | WSU | 65,372 | 65,372 | 0 | 0.0% | NA | K |
| 9I | UT Career Path | 608,790 | 608,790 | 0 | 0.0% | NA | 9-12 |

***FY14 Prior-Year ADM plus Fall Enrollment Growth Scenario--Sorted by Percent Change***

*Grade-Level Factors Retained*

| ID | LEA | Current | Scenario | Current | Scenario - Percent | Fall Enroll. Change |
|---|---|---|---|---|---|---|
| | **Statewide:** | $152,440,322 | $148,858,000 | ($3,582,322) | -2.3% | 8.1% |
| 9F | OPEN HIGH SCHOOL OF UTAH | 1,303,333 | 1,116,553 | (186,780) | -14.3% | 16.5% |
| 92 | UINTAH RIVER HIGH | 257,431 | 220,820 | (36,611) | -14.2% | 13.8% |
| 87 | CITY ACADEMY | 781,600 | 689,118 | (92,482) | -11.8% | 7.8% |
| 3D | SPECTRUM ACADEMY | 1,574,244 | 1,404,476 | (169,768) | -10.8% | 11.1% |
| 86 | PINNACLE CANYON ACADEMY | 1,507,336 | 1,377,950 | (129,386) | -8.6% | -0.6% |
| A3 | DAVINCI ACADEMY | 3,082,507 | 2,837,251 | (245,256) | -8.0% | 0.3% |
| 1E | GUADALUPE SCHOOL | 326,862 | 301,528 | (25,334) | -7.8% | 6.3% |
| 7H | Pacific Heritage | 1,036,973 | 966,202 | (70,771) | -6.8% | -11.8% |
| 4G | MARIA MONTESSORI ACADEMY | 1,358,849 | 1,267,127 | (91,722) | -6.7% | 11.0% |
| 1C | ODYSSEY CHARTER SCHOOL | 1,305,129 | 1,236,302 | (68,827) | -5.3% | -0.2% |
| 8G | GOOD FOUNDATION ACADEMY | 1,146,990 | 1,087,702 | (59,288) | -5.2% | 4.7% |
| 2E | KARL G MAESER PREPARATORY | 2,021,878 | 1,918,205 | (103,673) | -5.1% | 0.8% |
| 8D | OPEN CLASSROOM | 980,355 | 931,631 | (48,724) | -5.0% | 1.3% |
| 7D | SALT LAKE SCHOOL FOR THE PE | 1,015,810 | 965,906 | (49,904) | -4.9% | 23.7% |
| 5H | High Mark | 1,827,936 | 1,740,058 | (87,878) | -4.8% | 19.4% |
| 3B | BEEHIVE SCIENCE & TECHNOLO | 901,966 | 859,200 | (42,766) | -4.7% | 27.8% |
| 1F | QUEST ACADEMY | 2,435,247 | 2,321,638 | (113,609) | -4.7% | 5.4% |
| 98 | FAST FORWARD HIGH | 827,954 | 790,615 | (37,339) | -4.5% | 3.9% |
| 3F | VENTURE ACADEMY | 2,079,685 | 1,992,503 | (87,182) | -4.2% | 21.1% |
| 95 | TIMPANOGOS ACADEMY | 1,109,535 | 1,063,933 | (45,602) | -4.1% | -2.2% |
| 3E | CS LEWIS ACADEMY | 1,110,607 | 1,065,148 | (45,459) | -4.1% | -0.2% |
| 82 | FREEDOM ACADEMY | 2,510,679 | 2,412,246 | (98,433) | -3.9% | 24.3% |
| 3H | ENDEAVOR HALL | 1,551,197 | 1,491,234 | (59,963) | -3.9% | 6.0% |
| 90 | TUACAHN HIGH SCHOOL FOR TH | 1,325,423 | 1,278,021 | (47,402) | -3.6% | 4.4% |
| 89 | SOLDIER HOLLOW CHARTER SC | 735,360 | 710,139 | (25,221) | -3.4% | 2.1% |
| 4C | LAKEVIEW ACADEMY | 2,410,027 | 2,334,542 | (75,485) | -3.1% | 10.7% |
| 9C | PARADIGM HIGH SCHOOL | 2,097,891 | 2,034,095 | (63,796) | -3.0% | 20.5% |
| 68 | OGDEN PREPARATORY ACADEM | 2,737,062 | 2,658,925 | (78,137) | -2.9% | 1.6% |
| 74 | AMERICAN PREPARATORY ACAD | 9,245,405 | 8,976,232 | (269,173) | -2.9% | 48.5% |
| 94 | THOMAS EDISON - LEA | 3,364,086 | 3,266,193 | (97,893) | -2.9% | 7.8% |
| 1D | RENAISSANCE ACADEMY | 1,808,803 | 1,757,035 | (51,768) | -2.9% | 5.3% |
| 6G | WEILENMANN SCHOOL OF DISC | 1,481,708 | 1,438,504 | (43,204) | -2.9% | -1.2% |
| 93 | JOHN HANCOCK CHARTER SCH | 470,218 | 456,981 | (13,237) | -2.8% | 0.5% |
| 5D | GEORGE WASHINGTON ACADEM | 2,567,471 | 2,496,427 | (71,044) | -2.8% | 4.0% |
| 4E | DUAL IMMERSION ACADEMY | 1,071,789 | 1,043,820 | (27,969) | -2.6% | 2.8% |
| A1 | NO UT ACAD FOR MATH ENGINE | 1,739,400 | 1,695,840 | (43,560) | -2.5% | 0.0% |
| 3C | ENTHEOS ACADEMY | 2,724,219 | 2,656,049 | (68,170) | -2.5% | 2.4% |
| 6F | EARLY LIGHT ACADEMY AT DAYE | 1,974,451 | 1,925,820 | (48,631) | -2.5% | 0.0% |
| A9 | SUCCESS ACADEMY | 1,304,550 | 1,273,049 | (31,501) | -2.4% | 1.4% |
| 1B | UTAH COUNTY ACADEMY OF SC | 1,398,478 | 1,364,869 | (33,609) | -2.4% | 1.3% |
| 8C | MOUNTAINVILLE ACADEMY | 1,934,068 | 1,888,391 | (45,677) | -2.4% | 0.1% |

| | Schools | Dollars |
|---|---|---|
| Negative Impact | 66 | ($3,582,320) |
| No Impact | 24 | ($2) |
| Statewide: | 90 | ($3,582,322) |

| | | | | | | |
|---|---|---|---|---|---|---|
| 7F | EXCELSIOR ACADEMY | 1,722,296 | 1,681,200 | (41,096) | -2.4% | 0.0% |
| 7C | MONTICELLO ACADEMY | 1,979,842 | 1,933,474 | (46,368) | -2.3% | 0.0% |
| A5 | ITINERIS EARLY COLLEGE HIGH | 1,033,204 | 1,011,815 | (21,389) | -2.1% | 24.8% |
| 4D | SYRACUSE ARTS ACADEMY | 2,679,836 | 2,624,395 | (55,441) | -2.1% | 0.1% |
| 3G | BEAR RIVER CHARTER SCHOOL | 457,983 | 448,658 | (9,325) | -2.0% | 0.0% |
| A6 | NORTH DAVIS PREPARATORY A( | 2,635,974 | 2,593,988 | (41,986) | -1.6% | -1.0% |
| 2B | LINCOLN ACADEMY | 1,840,605 | 1,811,640 | (28,965) | -1.6% | 6.9% |
| 8F | HAWTHORN ACADEMY | 2,128,533 | 2,094,209 | (34,324) | -1.6% | 0.0% |
| 1G | OQUIRRH MOUNTAIN CHARTER | 1,939,923 | 1,907,930 | (31,993) | -1.6% | -2.7% |
| 83 | ACADEMY FOR MATH ENGINEER | 1,708,091 | 1,683,693 | (24,398) | -1.4% | 0.4% |
| 5E | EDITH BOWEN LABORATORY SC | 744,464 | 735,253 | (9,211) | -1.2% | 0.0% |
| A2 | RANCHES ACADEMY | 896,950 | 887,804 | (9,146) | -1.0% | 0.0% |
| 7B | REAGAN ACADEMY | 1,713,077 | 1,695,779 | (17,298) | -1.0% | -0.1% |
| 9B | NAVIGATOR POINTE ACADEMY | 1,344,267 | 1,330,224 | (14,043) | -1.0% | -1.3% |
| 6H | Promontory School | 1,188,069 | 1,177,916 | (10,153) | -0.9% | 3.1% |
| A8 | EAST HOLLYWOOD HIGH | 1,074,949 | 1,066,333 | (8,616) | -0.8% | -4.9% |
| A7 | MOAB CHARTER SCHOOL | 281,348 | 279,742 | (1,606) | -0.6% | 10.5% |
| 4B | WASATCH PEAK ACADEMY | $1,013,346 | 1,008,493 | (4,853) | -0.5% | 10.9% |
| 5B | NORTH STAR ACADEMY | 1,400,537 | 1,394,062 | (6,475) | -0.5% | 3.3% |
| 9H | Pioneer High | 1,666,345 | 1,657,929 | (8,416) | -0.5% | 130.3% |
| 8H | Valley Arts | 1,041,496 | 1,037,741 | (3,755) | -0.4% | -4.8% |
| 9D | CANYON RIM ACADEMY | 1,289,621 | 1,285,991 | (3,630) | -0.3% | 0.0% |
| 8B | AMERICAN LEADERSHIP ACADEI | 4,829,618 | 4,819,466 | (10,152) | -0.2% | -3.4% |
| 5C | LEGACY PREPARATORY ACADEI | 2,821,510 | 2,815,970 | (5,540) | -0.2% | -1.7% |
| A4 | SUMMIT ACADEMY | 2,562,020 | 2,560,113 | (1,907) | -0.1% | -0.2% |
| 81 | WALDEN SCHOOL OF LIBERAL A | 1,431,610 | 1,431,610 | 0 | 0.0% | -17.5% |
| 97 | SALT LAKE ARTS ACADEMY | 1,064,187 | 1,064,188 | 1 | 0.0% | 30.0% |
| 2C | INTECH COLLEGIATE HIGH SCH( | 629,819 | 629,819 | 0 | 0.0% | 16.8% |
| 6C | LIBERTY ACADEMY | 1,010,947 | 1,010,945 | (2) | 0.0% | -9.5% |
| 2D | CHANNING HALL | 1,669,172 | 1,669,172 | 0 | 0.0% | -2.5% |
| 6D | NOAH WEBSTER ACADEMY | 1,399,603 | 1,399,602 | (1) | 0.0% | -10.4% |
| 7E | GATEWAY PREPARATORY ACAD | 1,681,929 | 1,681,930 | 1 | 0.0% | -6.4% |
| 8E | MERIT COLLEGE PREPARATORY | 1,768,223 | 1,768,222 | (1) | 0.0% | -57.0% |
| 9E | PROVIDENCE HALL | 4,242,782 | 4,242,782 | 0 | 0.0% | 6.4% |
| 2F | ROCKWELL CHARTER HIGH SCH | 2,221,500 | 2,221,501 | 1 | 0.0% | -23.4% |
| 4F | SALT LAKE CENTER FOR SCIENC | 1,186,574 | 1,186,572 | (2) | 0.0% | 8.6% |
| 5F | UTAH VIRTUAL ACADEMY | 5,632,122 | 5,632,122 | 0 | 0.0% | -4.6% |
| 2G | VISTA AT ENTRADA SCHOOL OF | 2,081,109 | 2,081,108 | (1) | 0.0% | -5.2% |
| 5G | QUAIL RUN PRIMARY SCHOOL | 1,091,592 | 1,091,595 | 3 | 0.0% | 33.3% |
| 7G | SUMMIT ACADEMY HIGH SCHOO | 2,091,670 | 2,091,669 | (1) | 0.0% | -18.9% |
| 9G | ALIANZA ACADEMY | 1,190,916 | 1,190,918 | 2 | 0.0% | -8.6% |
| 2H | UTAH CONNECTIONS ACADEMY | 2,032,778 | 2,032,779 | 1 | 0.0% | 53.5% |
| 4H | Aristotle Aca | 539,897 | 539,895 | (2) | 0.0% | -14.7% |
| 1I | UT International | 328,312 | 328,312 | 0 | 0.0% | NA |
| 3I | Leadership | 1,091,908 | 1,091,908 | 0 | 0.0% | NA |
| 4I | Mana | 1,717,716 | 1,717,715 | (1) | 0.0% | NA |
| 5I | Voyage | 1,223,378 | 1,223,378 | 0 | 0.0% | NA |
| 7I | WSU | 65,372 | 65,372 | 0 | 0.0% | NA |
| 9I | UT Career Path | 608,790 | 608,790 | 0 | 0.0% | NA |

## October 1, 2013 Charter School Enrollment and Authorized Enrollment Maximum (AKA Cap)

| ID | | K | 1-6 | 7-8 | 9-12 | Total | Enroll Cap | Percent of Cap |
|---|---|---|---|---|---|---|---|---|
| | **Statewide Totals:** | 4,988 | 29,540 | 8,935 | 11,437 | 54,900 | 63,116 | 87.0% |
| 68 | Ogden Preparatory Academy | 103 | 646 | 211 | 81 | 1,041 | 1,300 | 80.1% |
| 74 | American Preparatory Academy | 290 | 1,990 | 673 | 477 | 3,430 | 3,435 | 99.9% |
| 81 | Walden School Of Liberal Arts | 52 | 187 | 66 | 138 | 443 | 680 | 65.1% |
| 82 | Freedom Academy | 109 | 571 | 180 | 95 | 955 | 975 | 97.9% |
| 83 | Academy For Math Engineering & | 0 | 0 | 0 | 491 | 491 | 500 | 98.2% |
| 86 | Pinnacle Canyon Academy | 35 | 210 | 70 | 202 | 517 | 520 | 99.4% |
| 87 | City Academy | 0 | 0 | 59 | 176 | 235 | 500 | 47.0% |
| 89 | Soldier Hollow Charter School | 40 | 231 | 24 | 0 | 295 | 396 | 74.5% |
| 90 | Tuacahn High School For The Per | 0 | 0 | 0 | 381 | 381 | 410 | 92.9% |
| 92 | Uintah River High | 0 | 0 | 0 | 74 | 74 | 80 | 92.5% |
| 93 | John Hancock Charter School | 20 | 135 | 30 | 0 | 185 | 200 | 92.5% |
| 94 | Thomas Edison - North | 165 | 872 | 232 | 46 | 1,315 | 1,386 | 94.9% |
| 95 | Timpanogos Academy | 50 | 310 | 77 | 0 | 437 | 675 | 64.7% |
| 97 | Salt Lake Arts Academy | 0 | 212 | 178 | 0 | 390 | 400 | 97.5% |
| 98 | Fast Forward High | 0 | 0 | 0 | 238 | 238 | 300 | 79.3% |
| A1 | NUAMES | 0 | 0 | 0 | 548 | 548 | 500 | 109.6% |
| A2 | Ranches Academy | 52 | 312 | 0 | 0 | 364 | 400 | 91.0% |
| A3 | Davinci Academy | 64 | 607 | 140 | 286 | 1,097 | 1,100 | 99.7% |
| A4 | Summit Academy | 104 | 650 | 244 | 0 | 998 | 1,000 | 99.8% |
| A5 | Itineris Early College High | 0 | 0 | 0 | 297 | 297 | 300 | 99.0% |
| A6 | North Davis Preparatory Academy | 105 | 656 | 168 | 79 | 1,008 | 1,108 | 91.0% |
| A7 | Moab Community School | 21 | 95 | 0 | 0 | 116 | 175 | 66.3% |
| A8 | East Hollywood High | 0 | 0 | 0 | 309 | 309 | 700 | 44.1% |
| A9 | Success Academy | 0 | 0 | 0 | 375 | 375 | 400 | 93.8% |
| 1B | UCAS | 0 | 0 | 0 | 402 | 402 | 500 | 80.4% |
| 2B | Lincoln Academy | 50 | 393 | 169 | 72 | 684 | 640 | 106.9% |
| 3B | Beehive Science & Technology Ac | 0 | 50 | 127 | 117 | 294 | 450 | 65.3% |
| 4B | Wasatch Peak Academy | 71 | 345 | 0 | 0 | 416 | 525 | 79.2% |
| 5B | North Star Academy | 50 | 306 | 119 | 52 | 527 | 536 | 98.3% |
| 7B | Reagan Academy | 79 | 462 | 133 | 0 | 674 | 675 | 99.9% |
| 8B | American Leadership Academy | 114 | 711 | 304 | 552 | 1,681 | 1,825 | 92.1% |
| 9B | Navigator Pointe Academy | 59 | 339 | 85 | 35 | 518 | 565 | 91.7% |
| 1C | Odyssey Charter School | 92 | 444 | 0 | 0 | 536 | 550 | 97.5% |
| 2C | Intech Collegiate High School | 0 | 0 | 0 | 181 | 181 | 300 | 60.3% |
| 3C | Entheos Academy | 104 | 633 | 219 | 80 | 1,036 | 1,060 | 97.7% |
| 4C | Lakeview Academy | 102 | 615 | 167 | 47 | 931 | 950 | 98.0% |
| 5C | Legacy Preparatory Academy | 109 | 666 | 208 | 90 | 1,073 | 1,232 | 87.1% |
| 6C | Liberty Academy | 61 | 254 | 52 | 16 | 383 | 675 | 56.7% |
| 7C | Monticello Academy | 75 | 462 | 146 | 69 | 752 | 750 | 100.3% |
| 8C | Mountainville Academy | 82 | 525 | 105 | 38 | 750 | 750 | 100.0% |
| 9C | Paradigm High School | 0 | 0 | 157 | 487 | 644 | 630 | 102.2% |
| 1D | Renaissance Academy | 99 | 505 | 81 | 29 | 714 | 780 | 91.5% |
| 2D | Channing Hall | 79 | 465 | 114 | 0 | 658 | 675 | 97.5% |
| 3D | Spectrum Academy | 24 | 224 | 117 | 177 | 542 | 558 | 97.1% |

**Enrollment as a Percent of Cap**
*Sorted by Percent*

| | | |
|---|---|---|
| A1 | NUAMES | 109.6% |
| 2B | Lincoln Academy | 106.9% |
| 9C | Paradigm High School | 102.2% |
| 7F | Excelsior Academy | 101.2% |
| 9D | Canyon Rim Academy | 100.6% |
| 6F | Early Light Academy At Day | 100.3% |
| 7C | Monticello Academy | 100.3% |
| 4D | Syracuse Arts Academy | 100.1% |
| 8F | Hawthorn Academy | 100.1% |
| 3G | Bear River Charter School | 100.0% |
| 4I | Mana | 100.0% |
| 5E | Edith Bowen Laboratory Sch | 100.0% |
| 8C | Mountainville Academy | 100.0% |
| 9I | UT Career Path | 100.0% |
| 74 | American Preparatory Acad | 99.9% |
| 5D | George Washington Acader | 99.9% |
| 7B | Reagan Academy | 99.9% |
| 3E | Cs Lewis Academy | 99.8% |
| A4 | Summit Academy | 99.8% |
| A3 | Davinci Academy | 99.7% |
| 9E | Providence Hall | 99.5% |
| 86 | Pinnacle Canyon Academy | 99.4% |
| 2E | Karl G Maeser Preparatory / | 99.0% |
| A5 | Itineris Early College High | 99.0% |
| 8G | Good Foundation Academy | 98.7% |
| 5B | North Star Academy | 98.3% |
| 83 | Academy For Math Enginee | 98.2% |
| 4C | Lakeview Academy | 98.0% |
| 82 | Freedom Academy | 97.9% |
| 3C | Entheos Academy | 97.7% |
| 97 | Salt Lake Arts Academy | 97.5% |
| 1C | Odyssey Charter School | 97.5% |
| 2D | Channing Hall | 97.5% |
| 5H | High Mark | 97.4% |
| 3D | Spectrum Academy | 97.1% |
| 3F | Venture Academy | 96.5% |
| 5F | Utah Virtual Academy | 95.4% |
| 1G | Oquirrh Mountain Charter S | 95.3% |
| 5I | Voyage | 95.2% |
| 94 | Thomas Edison - North | 94.9% |
| 6G | Weilenmann School Of Disc | 94.2% |
| A9 | Success Academy | 93.8% |
| 7E | Gateway Preparatory Acade | 93.5% |
| 7I | WSU | 93.2% |

## October 1, 2013 Charter School Enrollment and Authorized Enrollment Maximum (AKA Cap)

| ID | | K | 1-6 | 7-8 | 9-12 | Total | Enroll Cap | Percent of Cap |
|---|---|---|---|---|---|---|---|---|
| | **Statewide Totals:** | 4,988 | 29,540 | 8,935 | 11,437 | 54,900 | 63,116 | 87.0% |
| 68 | Ogden Preparatory Academy | 103 | 646 | 211 | 81 | 1,041 | 1,300 | 80.1% |
| 4D | Syracuse Arts Academy | 109 | 647 | 195 | 75 | 1,026 | 1,025 | 100.1% |
| 5D | George Washington Academy | 130 | 788 | 106 | 0 | 1,024 | 1,025 | 99.9% |
| 6D | Noah Webster Academy | 88 | 448 | 0 | 0 | 536 | 625 | 85.8% |
| 7D | Salt Lake School For The Perform | 0 | 0 | 0 | 292 | 292 | 400 | 73.0% |
| 8D | Open Classroom | 40 | 282 | 63 | 0 | 385 | 509 | 75.6% |
| 9D | Canyon Rim Academy | 79 | 449 | 0 | 0 | 528 | 525 | 100.6% |
| 1E | Guadalupe School | 25 | 110 | 0 | 0 | 135 | 175 | 77.1% |
| 2E | Karl G Maeser Preparatory Acade | 0 | 0 | 216 | 403 | 619 | 625 | 99.0% |
| 3E | Cs Lewis Academy | 60 | 389 | 0 | 0 | 449 | 450 | 99.8% |
| 4E | Dual Immersion Academy | 80 | 308 | 49 | 0 | 437 | 500 | 87.4% |
| 5E | Edith Bowen Laboratory School | 48 | 256 | 0 | 0 | 304 | 304 | 100.0% |
| 7E | Gateway Preparatory Academy | 50 | 463 | 118 | 0 | 631 | 675 | 93.5% |
| 8E | Merit College Preparatory Academ | 0 | 0 | 51 | 206 | 257 | 600 | 42.8% |
| 9E | Providence Hall | 125 | 779 | 366 | 273 | 1,543 | 1,550 | 99.5% |
| 1F | Quest Academy | 102 | 687 | 137 | 25 | 951 | 1,048 | 90.7% |
| 2F | Rockwell Charter High School | 0 | 0 | 200 | 335 | 535 | 700 | 76.4% |
| 3F | Venture Academy | 50 | 311 | 122 | 241 | 724 | 750 | 96.5% |
| 4F | Salt Lake Center For Science Edu | 0 | 60 | 126 | 192 | 378 | 420 | 90.0% |
| 5F | Utah Virtual Academy | 113 | 793 | 463 | 587 | 1,956 | 2,050 | 95.4% |
| 6F | Early Light Academy At Daybreak | 75 | 457 | 162 | 58 | 752 | 750 | 100.3% |
| 7F | Excelsior Academy | 74 | 473 | 136 | 0 | 683 | 675 | 101.2% |
| 8F | Hawthorn Academy | 79 | 495 | 182 | 55 | 811 | 810 | 100.1% |
| 9F | Open High School Of Utah | 0 | 0 | 82 | 307 | 389 | 1,500 | 25.9% |
| 1G | Oquirrh Mountain Charter School | 92 | 553 | 93 | 24 | 762 | 800 | 95.3% |
| 2G | Vista At Entrada School Of Perfon | 78 | 550 | 171 | 0 | 799 | 875 | 91.3% |
| 3G | Bear River Charter School | 21 | 122 | 37 | 0 | 180 | 180 | 100.0% |
| 4G | Maria Montessori Academy | 73 | 419 | 52 | 0 | 544 | 675 | 80.6% |
| 5G | Quail Run Primary School | 108 | 310 | 34 | 0 | 452 | 648 | 69.8% |
| 6G | Weilenmann School Of Discovery | 54 | 437 | 89 | 0 | 580 | 616 | 94.2% |
| 7G | Summit Academy High School | 0 | 0 | 0 | 499 | 499 | 1200 | 41.6% |
| 8G | Good Foundation Academy | 73 | 395 | 0 | 0 | 468 | 474 | 98.7% |
| 9G | Alianza Academy | 56 | 327 | 74 | 0 | 457 | 500 | 91.4% |
| 2H | Utah Connections Academy | 43 | 232 | 141 | 273 | 689 | 750 | 91.9% |
| 3H | Endeavor Hall | 75 | 442 | 97 | 0 | 614 | 675 | 91.0% |
| 4H | Aristotle Aca | 41 | 157 | 22 | 0 | 220 | 540 | 40.7% |
| 5H | High Mark | 48 | 372 | 186 | 71 | 677 | 695 | 97.4% |
| 6H | Promontory School | 50 | 306 | 108 | 0 | 464 | 500 | 92.8% |
| 7H | Pacific Heritage | 40 | 197 | 160 | 0 | 397 | 450 | 88.2% |
| 8H | Valley Arts | 70 | 275 | 74 | 0 | 419 | 500 | 83.8% |
| 9H | Pioneer High | 0 | 0 | 0 | 479 | 479 | 1000 | 47.9% |
| 1I | UT International | 0 | 0 | 55 | 49 | 104 | 320 | 32.5% |
| 3I | Leadership | 81 | 369 | 0 | 0 | 450 | 567 | 79.4% |
| 4I | Mana | 77 | 379 | 113 | 81 | 650 | 650 | 100.0% |

**Enrollment as a Percent of Cap**
*Sorted by Percent*

| | | |
|---|---|---|
| A1 | NUAMES | 109.6% |
| 90 | Tuacahn High School For Tl | 92.9% |
| 6H | Promontory School | 92.8% |
| 92 | Uintah River High | 92.5% |
| 93 | John Hancock Charter Scho | 92.5% |
| 8B | American Leadership Acade | 92.1% |
| 2H | Utah Connections Academy | 91.9% |
| 9B | Navigator Pointe Academy | 91.7% |
| 1D | Renaissance Academy | 91.5% |
| 9G | Alianza Academy | 91.4% |
| 2G | Vista At Entrada School Of I | 91.3% |
| 3H | Endeavor Hall | 91.0% |
| A2 | Ranches Academy | 91.0% |
| A6 | North Davis Preparatory Aca | 91.0% |
| 1F | Quest Academy | 90.7% |
| 4F | Salt Lake Center For Scienc | 90.0% |
| 7H | Pacific Heritage | 88.2% |
| 4E | Dual Immersion Academy | 87.4% |
| 5C | Legacy Preparatory Academ | 87.1% |
| 6D | Noah Webster Academy | 85.8% |
| 8H | Valley Arts | 83.8% |
| 4G | Maria Montessori Academy | 80.6% |
| 1B | UCAS | 80.4% |
| 68 | Ogden Preparatory Academ | 80.1% |
| 3I | Leadership | 79.4% |
| 98 | Fast Forward High | 79.3% |
| 4B | Wasatch Peak Academy | 79.2% |
| 1E | Guadalupe School | 77.1% |
| 2F | Rockwell Charter High Scho | 76.4% |
| 8D | Open Classroom | 75.6% |
| 89 | Soldier Hollow Charter Schc | 74.5% |
| 7D | Salt Lake School For The Pe | 73.0% |
| 5G | Quail Run Primary School | 69.8% |
| A7 | Moab Community School | 66.3% |
| 3B | Beehive Science & Technol | 65.3% |
| 81 | Walden School Of Liberal A | 65.1% |
| 95 | Timpanogos Academy | 64.7% |
| 2C | Intech Collegiate High Scho | 60.3% |
| 6C | Liberty Academy | 56.7% |
| 9H | Pioneer High | 47.9% |
| 87 | City Academy | 47.0% |
| A8 | East Hollywood High | 44.1% |
| 8E | Merit College Preparatory A | 42.8% |
| 7G | Summit Academy High Sch | 41.6% |

## October 1, 2013 Charter School Enrollment and Authorized Enrollment Maximum (AKA Cap)

| ID | | K | 1-6 | 7-8 | 9-12 | Total | Enroll Cap | Percent of Cap |
|---|---|---|---|---|---|---|---|---|
| | **Statewide Totals:** | 4,988 | 29,540 | 8,935 | 11,437 | 54,900 | 63,116 | 87.0% |
| 68 | Ogden Preparatory Academy | 103 | 646 | 211 | 81 | 1,041 | 1,300 | 80.1% |
| 5I | Voyage | 80 | 420 | 0 | 0 | 500 | 525 | 95.2% |
| 7I | WSU | 41 | 0 | 0 | 0 | 41 | 44 | 93.2% |
| 9I | UT Career Path | 0 | 0 | 0 | 175 | 175 | 175 | 100.0% |

**Enrollment as a Percent of Cap**
*Sorted by Percent*

| | | |
|---|---|---|
| A1 | NUAMES | 109.6% |
| 4H | Aristotle Aca | 40.7% |
| 1I | UT International | 32.5% |
| 9F | Open High School Of Utah | 25.9% |

## FY14 Administrative Cost Scenario

| Per Pupil | |
|---|---|
| 0-299 | 250 |
| 300-499 | 200 |
| 500-999 | 160 |
| 1000-2499 | 140 |
| 2500-5000 | 100 |

## FY14 K-12 and Administrative Cost Scenario Effects

| | Admin Costs | K-12 | Net |
|---|---|---|---|
| District Losses | $ (1,175,670) | $ - | |
| District Gains | $ 1,690,470 | $ - | $ 514,800 |
| Charter Losses | $ - | $ (3,582,322) | $ (38,692) |
| Charter Gains | $ 3,543,630 | $ - | |

**FY14 Administrative Cost Scenario** | **FY14 Administrative Cost Comparison**

| | | Fall Enrollment October 1, 2013 | per Pupil | Total | Current | Scenario - Current |
|---|---|---|---|---|---|---|
| | Charter | 54,900 | $ 165 | $ 9,033,630 | $ 5,490,000 | $ 3,543,630 |
| | District | 557,651 | $ 9 | $ 4,863,300 | $ 4,348,500 | $ 514,800 |
| ID | Statewide | 612,551 | $ 23 | $ 13,896,930 | $ 9,838,500 | $ 4,058,430 |
| 1 | Alpine | 72,419 | 0 | 0 | - | - |
| 2 | Beaver | 1,579 | 140 | 221,060 | 202,930 | 18,130 |
| 3 | Box Elder | 11,131 | 0 | 0 | - | - |
| 4 | Cache | 16,038 | 0 | 0 | - | - |
| 5 | Carbon | 3,369 | 100 | 336,900 | 173,940 | 162,960 |
| 6 | Daggett | 194 | 250 | 48,500 | 275,405 | (226,905) |
| 7 | Davis | 68,573 | 0 | 0 | - | - |
| 8 | Duchesne | 5,021 | 0 | 0 | - | - |
| 9 | Emery | 2,310 | 140 | 323,400 | 173,940 | 149,460 |
| 10 | Garfield | 930 | 160 | 148,800 | 231,920 | (83,120) |
| 11 | Grand | 1,455 | 140 | 203,700 | 202,930 | 770 |
| 12 | Granite | 68,106 | 0 | 0 | - | - |
| 13 | Iron | 8,685 | 0 | 0 | - | - |
| 14 | Jordan | 52,855 | 0 | 0 | - | - |
| 15 | Juab | 2,287 | 140 | 320,180 | 173,940 | 146,240 |
| 16 | Kane | 1,212 | 140 | 169,680 | 202,930 | (33,250) |
| 17 | Millard | 2,841 | 100 | 284,100 | 173,940 | 110,160 |
| 18 | Morgan | 2,632 | 100 | 263,200 | 173,940 | 89,260 |
| 19 | Nebo | 31,230 | 0 | 0 | - | - |
| 20 | No. Sanpete | 2,408 | 140 | 337,120 | 173,940 | 163,180 |
| 21 | No. Summit | 990 | 160 | 158,400 | 231,920 | (73,520) |
| 22 | Park City | 4,630 | 100 | 463,000 | 173,940 | 289,060 |
| 23 | Piute | 304 | 200 | 60,800 | 275,405 | (214,605) |
| 24 | Rich | 479 | 200 | 95,800 | 275,405 | (179,605) |
| 25 | San Juan | 3,020 | 100 | 302,000 | 173,940 | 128,060 |
| 26 | Sevier | 4,585 | 100 | 458,500 | 173,940 | 284,560 |
| 27 | So. Sanpete | 3,162 | 100 | 316,200 | 173,940 | 142,260 |
| 28 | So. Summit | 1,495 | 140 | 209,300 | 202,930 | 6,370 |
| 29 | Tintic | 250 | 250 | 62,500 | 275,405 | (212,905) |
| 30 | Tooele | 14,107 | 0 | 0 | - | - |
| 31 | Uintah | 7,591 | 0 | 0 | - | - |
| 32 | Wasatch | 5,786 | 0 | 0 | - | - |
| 33 | Washington | 27,099 | 0 | 0 | - | - |
| 34 | Wayne | 501 | 160 | 80,160 | 231,920 | (151,760) |
| 35 | Weber | 31,028 | 0 | 0 | - | - |
| 36 | Salt Lake | 23,965 | 0 | 0 | - | - |
| 37 | Ogden | 12,489 | 0 | 0 | - | - |
| 38 | Provo | 14,799 | 0 | 0 | - | - |
| 39 | Logan | 5,987 | 0 | 0 | - | - |
| 40 | Murray | 6,435 | 0 | 0 | - | - |
| 41 | Canyons | 33,674 | 0 | 0 | - | - |

| FY14 Administrative Cost Scenario | Fall Enrollment October 1, 2013 | per Pupil | Total | FY14 Administrative Cost Comparison Current | Scenario - Current | FY14 K-12 Scenario Change | K-12 and Admin Cost Scenarios Change Total |
|---|---|---|---|---|---|---|---|
| 68 Ogden Prepara | 1,041 | $ 140 | $ 145,740 | $ 104,100 | $ 41,640 | $ (78,137) | $ (36,497) |
| 74 American Prep | 3,430 | 100 | 343,000 | 343,000 | - | (269,173) | (269,173) |
| 81 Walden | 443 | 200 | 88,600 | 44,300 | 44,300 | 0 | 44,300 |
| 82 Freedom | 955 | 160 | 152,800 | 95,500 | 57,300 | (98,433) | (41,133) |
| 83 AMES | 491 | 200 | 98,200 | 49,100 | 49,100 | (24,398) | 24,702 |
| 86 Pinnacle Canyo | 517 | 160 | 82,720 | 51,700 | 31,020 | (129,386) | (98,366) |
| 87 City Academy | 235 | 250 | 58,750 | 23,500 | 35,250 | (92,482) | (57,232) |
| 89 Soldier Hollow | 295 | 250 | 73,750 | 29,500 | 44,250 | (25,221) | 19,029 |
| 90 Tuacahn Perfo | 381 | 200 | 76,200 | 38,100 | 38,100 | (47,402) | (9,302) |
| 92 Uintah River Hi | 74 | 250 | 18,500 | 7,400 | 11,100 | (36,611) | (25,511) |
| 93 John Hancock | 185 | 250 | 46,250 | 18,500 | 27,750 | (13,237) | 14,513 |
| 94 Thomas Edisor | 1,315 | 140 | 184,100 | 131,500 | 52,600 | (97,893) | (45,293) |
| 95 Timpanogos Ac | 437 | 200 | 87,400 | 43,700 | 43,700 | (45,602) | (1,902) |
| 97 Salt Lake Arts | 390 | 200 | 78,000 | 39,000 | 39,000 | 1 | 39,001 |
| 98 Fast Forward H | 238 | 250 | 59,500 | 23,800 | 35,700 | (37,339) | (1,639) |
| 1B UCAS | 402 | 200 | 80,400 | 40,200 | 40,200 | (43,560) | (3,360) |
| 1C Odyssey | 536 | 160 | 85,760 | 53,600 | 32,160 | (9,146) | 23,014 |
| 1D Renaissance | 714 | 160 | 114,240 | 71,400 | 42,840 | (245,256) | (202,416) |
| 1E Guadalupe Sch | 135 | 250 | 33,750 | 13,500 | 20,250 | (1,907) | 18,343 |
| 1F Quest Academ | 951 | 160 | 152,160 | 95,100 | 57,060 | (21,389) | 35,671 |
| 1G Jefferson Acad | 762 | 160 | 121,920 | 76,200 | 45,720 | (41,986) | 3,734 |
| 1I Utah Internatio | 104 | 250 | 26,000 | 10,400 | 15,600 | (1,606) | 13,994 |
| 2B Lincoln Acader | 684 | 160 | 109,440 | 68,400 | 41,040 | (8,616) | 32,424 |
| 2C Early College | 181 | 250 | 45,250 | 18,100 | 27,150 | (31,501) | (4,351) |
| 2D So Ridge | 658 | 160 | 105,280 | 65,800 | 39,480 | (33,609) | 5,871 |
| 2E Karl G. Maeser | 619 | 160 | 99,040 | 61,900 | 37,140 | (28,965) | 8,175 |
| 2F Rockwell HS | 535 | 160 | 85,600 | 53,500 | 32,100 | (42,766) | (10,666) |
| 2G Vista at Entrad | 799 | 160 | 127,840 | 79,900 | 47,940 | (4,853) | 43,087 |
| 2H Utah Connectic | 689 | 160 | 110,240 | 68,900 | 41,340 | (6,475) | 34,865 |
| 3B Beehive Sci & | 294 | 250 | 73,500 | 29,400 | 44,100 | (17,298) | 26,802 |
| 3C Entheos | 1,036 | 140 | 145,040 | 103,600 | 41,440 | (10,152) | 31,288 |
| 3D Spectrum | 542 | 160 | 86,720 | 54,200 | 32,520 | (14,043) | 18,477 |
| 3E C.S. Lewis Aca | 449 | 200 | 89,800 | 44,900 | 44,900 | (68,827) | (23,927) |
| 3F Venture | 724 | 160 | 115,840 | 72,400 | 43,440 | 0 | 43,440 |
| 3G Bear River | 180 | 250 | 45,000 | 18,000 | 27,000 | (68,170) | (41,170) |
| 3H Endeavor Hall | 614 | 160 | 98,240 | 61,400 | 36,840 | (75,485) | (38,645) |
| 3I Leadership Lea | 450 | 200 | 90,000 | 45,000 | 45,000 | (5,540) | 39,460 |
| 4B Wasatch Peak | 416 | 200 | 83,200 | 41,600 | 41,600 | (2) | 41,598 |
| 4C Lakeview | 931 | 160 | 148,960 | 93,100 | 55,860 | (46,368) | 9,492 |
| 4D Syracuse Arts | 1,026 | 140 | 143,640 | 102,600 | 41,040 | (45,677) | (4,637) |
| 4E Dual Immersior | 437 | 200 | 87,400 | 43,700 | 43,700 | (63,796) | (20,096) |
| 4F Center for Scie | 378 | 200 | 75,600 | 37,800 | 37,800 | (51,768) | (13,968) |
| 4G Montessori | 544 | 160 | 87,040 | 54,400 | 32,640 | 0 | 32,640 |
| 4H Aristotle Acade | 220 | 250 | 55,000 | 22,000 | 33,000 | (169,768) | (136,768) |
| 4I Mana Academy | 650 | 160 | 104,000 | 65,000 | 39,000 | (55,441) | (16,441) |

| FY14 Administrative Cost Scenario | Fall Enrollment October 1, 2013 | per Pupil | Total | FY14 Administrative Cost Comparison Current | Scenario - Current | FY14 K-12 Scenario Change | K-12 and Admin Cost Scenarios Change Total |
|---|---|---|---|---|---|---|---|
| Charter | 54,900 | $ 165 | $ 9,033,630 | $ 5,490,000 | $ 3,543,630 | $ (3,582,322) | $ (38,692) |
| District | 557,651 | $ 9 | $ 4,863,300 | $ 4,348,500 | $ 514,800 | $ - | $ 514,800 |
| ID Statewide | 612,551 | $ 23 | $ 13,896,930 | $ 9,838,500 | $ 4,058,430 | $ (3,582,322) | $ 476,108 |
| 5B North Star Aca | 527 | $ 160 | $ 84,320 | $ 52,700 | $ 31,620 | $ (71,044) | $ (39,424) |
| 5C Legacy Prep | 1,073 | 140 | 150,220 | 107,300 | 42,920 | (1) | 42,919 |
| 5D Washington Ac | 1,024 | 140 | 143,360 | 102,400 | 40,960 | (49,904) | (8,944) |
| 5E Edith Bowen | 304 | 200 | 60,800 | 30,400 | 30,400 | (48,724) | (18,324) |
| 5F Utah Virtual Ac | 1,956 | 140 | 273,840 | 195,600 | 78,240 | (3,630) | 74,610 |
| 5G Canyon Grove | 452 | 200 | 90,400 | 45,200 | 45,200 | (25,334) | 19,866 |
| 5H High Mark Cha | 677 | 160 | 108,320 | 67,700 | 40,620 | (103,673) | (63,053) |
| 5I Voyage Acade | 500 | 160 | 80,000 | 50,000 | 30,000 | (45,459) | (15,459) |
| 6C Liberty | 383 | 200 | 76,600 | 38,300 | 38,300 | (27,969) | 10,331 |
| 6D Webster | 536 | 160 | 85,760 | 53,600 | 32,160 | (9,211) | 22,949 |
| 6F The Early Ligh | 752 | 160 | 120,320 | 75,200 | 45,120 | 1 | 45,121 |
| 6G Wellenmann | 580 | 160 | 92,800 | 58,000 | 34,800 | (1) | 34,799 |
| 6H Promontory Sc | 464 | 200 | 92,800 | 46,400 | 46,400 | 0 | 46,400 |
| 7B Reagan Acade | 674 | 160 | 107,840 | 67,400 | 40,440 | (113,609) | (73,169) |
| 7C Monticello | 752 | 160 | 120,320 | 75,200 | 45,120 | 1 | 45,121 |
| 7D Salt Lake Scho | 292 | 250 | 73,000 | 29,200 | 43,800 | (87,182) | (43,382) |
| 7E Gateway Prepa | 631 | 160 | 100,960 | 63,100 | 37,860 | (2) | 37,858 |
| 7F Excelsior Acad | 683 | 160 | 109,280 | 68,300 | 40,980 | 0 | 40,980 |
| 7G Summit Acade | 499 | 200 | 99,800 | 49,900 | 49,900 | (48,631) | 1,269 |
| 7H Pacific Heritag | 397 | 200 | 79,400 | 39,700 | 39,700 | (41,096) | (1,396) |
| 7I Weber State U | 41 | 250 | 10,250 | 4,100 | 6,150 | (34,324) | (28,174) |
| 8B American Achi | 1,681 | 140 | 235,340 | 168,100 | 67,240 | (186,780) | (119,540) |
| 8C Mountainville | 750 | 160 | 120,000 | 75,000 | 45,000 | (31,993) | 13,007 |
| 8D Open Classroo | 385 | 200 | 77,000 | 38,500 | 38,500 | (1) | 38,499 |
| 8E Merit College P | 257 | 250 | 64,250 | 25,700 | 38,550 | (9,325) | 29,225 |
| 8F Hawthorn Acad | 811 | 160 | 129,760 | 81,100 | 48,660 | (91,722) | (43,062) |
| 8G Good Foundati | 468 | 200 | 93,600 | 46,800 | 46,800 | 3 | 46,803 |
| 8H Valley Arts Aca | 419 | 200 | 83,800 | 41,900 | 41,900 | (43,204) | (1,304) |
| 9B APA West | 518 | 160 | 82,880 | 51,800 | 31,080 | (1) | 31,079 |
| 9C Paradigm | 644 | 160 | 103,040 | 64,400 | 38,640 | (59,288) | (20,648) |
| 9D Canyon Rim | 528 | 160 | 84,480 | 52,800 | 31,680 | 2 | 31,682 |
| 9E Providence Hal | 1,543 | 140 | 216,020 | 154,300 | 61,720 | 1 | 61,721 |
| 9F Mountain Heigl | 389 | 200 | 77,800 | 38,900 | 38,900 | (59,963) | (21,063) |
| 9G Alianza Acader | 457 | 200 | 91,400 | 45,700 | 45,700 | (2) | 45,698 |
| 9H Pioneer High S | 479 | 200 | 95,800 | 47,900 | 47,900 | (87,878) | (39,978) |
| 9I Utah Career Pa | 175 | 250 | 43,750 | 17,500 | 26,250 | (10,153) | 16,097 |
| A1 NUAMES | 548 | 160 | 87,680 | 54,800 | 32,880 | (70,771) | (37,891) |
| A2 Ranches | 364 | 200 | 72,800 | 36,400 | 36,400 | (3,755) | 32,645 |
| A3 DaVinci | 1,097 | 140 | 153,580 | 109,700 | 43,880 | (8,416) | 35,464 |
| A4 Summit | 998 | 160 | 159,680 | 99,800 | 59,880 | 0 | 59,880 |
| A5 Itineris | 297 | 250 | 74,250 | 29,700 | 44,550 | 0 | 44,550 |
| A6 North Davis Pr | 1,008 | 140 | 141,120 | 100,800 | 40,320 | (1) | 40,319 |
| A7 Moab Elem. | 116 | 250 | 29,000 | 11,600 | 17,400 | 0 | 17,400 |
| A8 East Hollywooc | 309 | 200 | 61,800 | 30,900 | 30,900 | 0 | 30,900 |
| A9 SUCCESS Aca | 375 | 200 | 75,000 | 37,500 | 37,500 | 0 | 37,500 |

**FY14 Regular Basic School Programs--Current**
**FY14 Scenario Including Flexible Allocation, Less Class Size Reduction Program**

| | WPU Value | $2,899 | $2,928 | $29 | |
|---|---|---|---|---|---|
| **ID** | **LEA** | **Current** | **Scenario** | **Scenario- Current** | **Scenario- Current** |
| | **Statewide:** | $2,326,219,600 | $2,326,219,600 | $0 | 0.0% |
| 31 | Uintah | 28,731,289 | 28,631,622 | (99,666) | -0.3% |
| 1 | Alpine | 264,284,631 | 263,732,187 | (552,444) | -0.2% |
| 37 | Ogden | 46,215,496 | 46,147,174 | (68,322) | -0.1% |
| 12 | Granite | 250,572,787 | 250,277,874 | (294,913) | -0.1% |
| 39 | Logan | 22,594,000 | 22,568,289 | (25,711) | -0.1% |
| 14 | Jordan | 194,706,697 | 194,508,257 | (198,440) | -0.1% |
| 18 | Morgan | 9,700,085 | 9,690,374 | (9,711) | -0.1% |
| 7 | Davis | 252,817,788 | 252,601,389 | (216,399) | -0.1% |
| 42 | Canyons | 125,185,891 | 125,173,920 | (11,971) | 0.0% |
| 36 | Salt Lake | 90,331,881 | 90,334,680 | 2,799 | 0.0% |
| 38 | Provo | 54,753,877 | 54,759,715 | 5,838 | 0.0% |
| 4 | Cache | 60,405,545 | 60,423,024 | 17,479 | 0.0% |
| 40 | Murray | 24,016,766 | 24,026,935 | 10,169 | 0.0% |
| 32 | Wasatch | 22,158,367 | 22,174,483 | 16,116 | 0.1% |
| 33 | Washington | 103,942,055 | 104,027,468 | 85,414 | 0.1% |
| 19 | Nebo | 118,599,907 | 118,720,396 | 120,489 | 0.1% |
| 22 | Park City | 17,226,180 | 17,254,004 | 27,824 | 0.2% |
| 3 | Box Elder | 42,895,899 | 42,971,404 | 75,505 | 0.2% |
| 15 | Juab | 8,716,786 | 8,732,876 | 16,090 | 0.2% |
| 30 | Tooele | 54,915,125 | 55,018,976 | 103,851 | 0.2% |
| 13 | Iron | 34,512,462 | 34,598,481 | 86,019 | 0.2% |
| 35 | Weber | 120,005,593 | 120,305,818 | 300,225 | 0.3% |
| 20 | North Sanpete | 9,583,665 | 9,613,700 | 30,035 | 0.3% |
| 5 | Carbon | 14,298,296 | 14,346,953 | 48,657 | 0.3% |
| 28 | South Summit | 6,398,866 | 6,431,821 | 32,955 | 0.5% |
| 8 | Duchesne | 21,134,272 | 21,251,001 | 116,729 | 0.6% |
| 26 | Sevier | 19,854,261 | 19,972,864 | 118,603 | 0.6% |
| 27 | South Sanpete | 13,653,137 | 13,747,568 | 94,431 | 0.7% |
| 11 | Grand | 6,451,319 | 6,516,667 | 65,349 | 1.0% |
| 17 | Millard | 13,143,896 | 13,279,457 | 135,562 | 1.0% |
| 2 | Beaver | 7,512,535 | 7,590,126 | 77,592 | 1.0% |
| 9 | Emery | 11,175,489 | 11,301,146 | 125,657 | 1.1% |
| 25 | San Juan | 15,260,363 | 15,462,530 | 202,167 | 1.3% |
| 21 | North Summit | 5,219,127 | 5,292,568 | 73,441 | 1.4% |
| 16 | Kane | 7,738,933 | 7,902,298 | 163,365 | 2.1% |
| 24 | Rich | 3,415,832 | 3,492,358 | 76,526 | 2.2% |
| 34 | Wayne | 3,583,885 | 3,667,516 | 83,631 | 2.3% |
| 10 | Garfield | 6,808,027 | 6,974,210 | 166,183 | 2.4% |
| 23 | Piute | 2,546,526 | 2,621,502 | 74,976 | 2.9% |
| 6 | Daggett | 1,953,197 | 2,014,087 | 60,890 | 3.1% |
| 29 | Tintic | 2,415,300 | 2,492,663 | 77,363 | 3.2% |
| | Charters | 197,866,800 | 196,106,725 | (1,760,075) | -0.9% |
| | Unallocated | 8,916,769 | 9,462,494 | 545,724 | 6.1% |

**FY14 Regular Basic School Programs--Current**
**FY14 Scenario Including Flexible Allocation, Less Class Size Reduction Program**

| | WPU Value | $2,899 | $2,928 | $29 | |
|---|---|---|---|---|---|
| ID | LEA | Current | Scenario | Scenario- Current | Scenario- Current |
| | Statewide: | $2,326,219,600 | $2,326,219,600 | $0 | 0.0% |
| 7I | WSU Charter Acaden | 98,748 | 92,542 | (6,206) | -6.3% |
| 5I | Voyage Academy | 1,542,965 | 1,484,467 | (58,498) | -3.8% |
| 6D | Noah Webster Acade | 1,791,780 | 1,725,908 | (65,872) | -3.7% |
| 4B | Wasatch Peak Acade | 1,301,414 | 1,254,233 | (47,181) | -3.6% |
| A7 | Moab Community Sch | 365,283 | 352,260 | (13,023) | -3.6% |
| 5G | Canyon Grove Acade | 1,450,284 | 1,398,666 | (51,618) | -3.6% |
| 3I | Leadership Learning / | 1,426,691 | 1,375,949 | (50,742) | -3.6% |
| 4E | Dual Immersion Acad | 1,358,439 | 1,310,960 | (47,479) | -3.5% |
| 8H | Valley Arts Academy | 1,333,687 | 1,287,129 | (46,558) | -3.5% |
| 9D | Canyon Rim Academ | 1,683,020 | 1,625,182 | (57,838) | -3.4% |
| 7F | Excelsior Academy | 2,142,790 | 2,070,009 | (72,781) | -3.4% |
| 2D | Channing Hall | 2,136,627 | 2,064,713 | (71,914) | -3.4% |
| 1E | Guadalupe Schools | 405,484 | 391,994 | (13,490) | -3.3% |
| 95 | Timpanogos Academ | 1,366,813 | 1,321,572 | (45,241) | -3.3% |
| 6H | Promontory School of | 1,495,575 | 1,446,101 | (49,474) | -3.3% |
| A4 | Summit Academy | 3,266,920 | 3,159,848 | (107,072) | -3.3% |
| 9G | Alianza Academy | 1,550,399 | 1,500,097 | (50,302) | -3.2% |
| 8G | Good Foundations Ac | 1,461,230 | 1,413,952 | (47,278) | -3.2% |
| 1C | Odyssey Charter Sch | 1,676,241 | 1,622,374 | (53,867) | -3.2% |
| 1D | Renaissance Academ | 2,220,664 | 2,151,422 | (69,242) | -3.1% |
| A2 | Ranches Academy | 1,204,195 | 1,166,689 | (37,506) | -3.1% |
| 5D | George Washington A | 3,328,658 | 3,225,000 | (103,658) | -3.1% |
| 3H | Endeavor Hall | 1,980,370 | 1,919,395 | (60,975) | -3.1% |
| 6G | Weilenmann School c | 1,891,199 | 1,833,103 | (58,096) | -3.1% |
| 7E | Gateway Preparatory | 2,197,160 | 2,130,072 | (67,088) | -3.1% |
| 3E | C.S. Lewis Academy | 1,451,645 | 1,407,437 | (44,208) | -3.0% |
| 7B | Reagan Academy | 2,256,027 | 2,187,896 | (68,131) | -3.0% |
| 4G | Maria Montessori Aca | 1,718,003 | 1,666,659 | (51,344) | -3.0% |
| 97 | Salt Lake Arts Acade | 1,335,141 | 1,296,200 | (38,941) | -2.9% |
| 5E | Edith Bowen Lab Sch | 1,031,776 | 1,001,965 | (29,811) | -2.9% |
| 1G | Jefferson Academy | 2,526,416 | 2,454,525 | (71,891) | -2.8% |
| 2G | Vista at Entrada | 2,814,813 | 2,735,575 | (79,238) | -2.8% |
| 4C | Lakeview Academy | 2,983,847 | 2,900,956 | (82,891) | -2.8% |
| 89 | Soldier Hollow Schoo | 994,043 | 966,476 | (27,567) | -2.8% |
| 7H | Pacific Heritage Acad | 1,298,107 | 1,262,759 | (35,348) | -2.7% |
| 8C | Mountainville Acader | 2,462,028 | 2,395,715 | (66,313) | -2.7% |
| A6 | North Davis Preparat | 3,309,309 | 3,220,936 | (88,373) | -2.7% |
| 4H | Aristotle Academy | 785,140 | 764,520 | (20,620) | -2.6% |
| 94 | Thomas Edison | 4,451,205 | 4,337,798 | (113,407) | -2.5% |
| 9B | Navigator Pointe Aca | 1,750,042 | 1,705,668 | (44,374) | -2.5% |
| 93 | John Hancock | 647,103 | 630,745 | (16,358) | -2.5% |
| 3G | Bear River Charter Sc | 639,551 | 623,701 | (15,850) | -2.5% |
| 1F | Quest Academy | 3,233,184 | 3,154,927 | (78,257) | -2.4% |
| 3C | Entheos Academy | 3,414,002 | 3,331,430 | (82,572) | -2.4% |
| 8D | Open Classroom | 1,338,889 | 1,306,726 | (32,163) | -2.4% |

**FY14 Regular Basic School Programs--Current**
**FY14 Scenario Including Flexible Allocation, Less Class Size Reduction Program**

| | WPU Value | $2,899 | $2,928 | $29 | |
|---|---|---|---|---|---|
| **ID** | **LEA** | **Current** | **Scenario** | **Scenario- Current** | **Scenario- Current** |
| | **Statewide:** | $2,326,219,600 | $2,326,219,600 | $0 | 0.0% |
| 8F | Hawthorn Acade | 2,715,601 | 2,650,733 | (64,868) | -2.4% |
| 4I | Mana Academy ( | 2,114,526 | 2,066,167 | (48,359) | -2.3% |
| 5B | North Star Acade | 1,765,740 | 1,725,917 | (39,823) | -2.3% |
| 7C | Monticello Acade | 2,501,340 | 2,445,004 | (56,336) | -2.3% |
| 5C | Legacy Preparat | 3,662,176 | 3,583,685 | (78,491) | -2.1% |
| 82 | Freedom Acade | 3,133,899 | 3,067,327 | (66,572) | -2.1% |
| 6F | Early Light Acad | 2,598,676 | 2,545,132 | (53,544) | -2.1% |
| 4D | Syracuse Arts Ac | 3,581,078 | 3,507,538 | (73,540) | -2.1% |
| 5H | High Mark Chart | 2,231,860 | 2,187,234 | (44,626) | -2.0% |
| 6C | Liberty Academy | 1,399,363 | 1,371,949 | (27,414) | -2.0% |
| 68 | Ogden Preparatc | 3,656,258 | 3,586,156 | (70,102) | -1.9% |
| 2B | Lincoln Academy | 2,396,659 | 2,354,588 | (42,071) | -1.8% |
| 74 | American Prepar | 11,710,081 | 11,521,916 | (188,165) | -1.6% |
| 9E | Providence Hall | 5,583,042 | 5,501,607 | (81,435) | -1.5% |
| 81 | Walden School | 1,909,826 | 1,892,822 | (17,004) | -0.9% |
| A3 | DaVinci Academ | 4,015,826 | 4,007,660 | (8,166) | -0.2% |
| 3F | Venture Academ | 2,490,807 | 2,490,384 | (423) | 0.0% |
| 8B | American Leade | 6,275,100 | 6,284,081 | 8,981 | 0.1% |
| 5F | Utah Virtual Acac | 8,467,504 | 8,509,054 | 41,550 | 0.5% |
| 2H | Utah Connection | 2,497,100 | 2,510,065 | 12,965 | 0.5% |
| 3B | Beehive Science | 1,082,528 | 1,090,692 | 8,164 | 0.8% |
| 86 | Pinnacle Canyon | 2,371,796 | 2,405,813 | 34,017 | 1.4% |
| 4F | SL Center for Sc | 1,498,305 | 1,522,934 | 24,629 | 1.6% |
| 1I | Utah Internationa | 453,466 | 461,365 | 7,899 | 1.7% |
| 2F | Rockwell Charte | 2,888,279 | 2,952,946 | 64,667 | 2.2% |
| 2E | Karl G. Maeser F | 2,372,724 | 2,435,842 | 63,118 | 2.7% |
| 3D | Spectrum Acade | 3,963,673 | 4,074,293 | 110,620 | 2.8% |
| 8E | Merit College Pre | 2,415,062 | 2,493,599 | 78,537 | 3.3% |
| 9C | Paradigm High S | 2,495,729 | 2,579,332 | 83,603 | 3.3% |
| 9F | Mountain Height | 1,544,421 | 1,600,236 | 55,815 | 3.6% |
| 87 | City Academy | 1,072,151 | 1,111,840 | 39,689 | 3.7% |
| 2C | Intech Collegiate | 880,475 | 924,964 | 44,489 | 5.1% |
| 92 | Uintah River Higl | 351,636 | 369,410 | 17,774 | 5.1% |
| 98 | Fast Forward Hig | 1,034,072 | 1,086,407 | 52,335 | 5.1% |
| A1 | NUAMES | 2,180,295 | 2,290,658 | 110,363 | 5.1% |
| 7G | Summit Academ | 2,426,292 | 2,549,149 | 122,857 | 5.1% |
| A8 | East Hollywood H | 1,281,863 | 1,346,796 | 64,933 | 5.1% |
| 9H | Pioneer High Scl | 1,864,963 | 1,959,436 | 94,473 | 5.1% |
| 90 | Tuacahn Perform | 1,567,503 | 1,646,908 | 79,405 | 5.1% |
| 9I | Utah Career Patl | 722,317 | 758,912 | 36,595 | 5.1% |
| 83 | AMES | 2,043,124 | 2,146,660 | 103,536 | 5.1% |
| 1B | UCAS | 1,698,107 | 1,784,184 | 86,077 | 5.1% |
| 7D | Salt Lake SPA | 1,175,444 | 1,235,033 | 59,589 | 5.1% |
| A9 | SUCCESS Acad | 1,473,614 | 1,548,333 | 74,719 | 5.1% |
| A5 | Itineris Early Coll | 1,185,592 | 1,245,710 | 60,118 | 5.1% |

***FY14 Prior-Year ADM plus Fall Enrollment Growth and Administrative Cost Scenarios***
*Sorted by Percent Difference*

| ID | LEA | K-12 | | | Administrative Costs | | | Total Funds Difference | Percent Difference |
|---|---|---|---|---|---|---|---|---|---|
| | | Current | Scenario | Scenario - Current | Current | Scenario | Scenario - Current | | |
| | **Total Charters:** | $152,440,322 | $148,858,000 | ($3,582,322) | $5,490,000 | $9,072,321 | $3,582,321 | ($1) | 0.0% |
| 4E | DUAL IMMERSION ACADEMY | 1,071,789 | 1,043,820 | (27,969) | 43,700 | 72,215 | 28,515 | 546 | 0.0% |
| 6F | EARLY LIGHT ACADEMY AT D | 1,974,451 | 1,925,820 | (48,631) | 75,200 | 124,269 | 49,069 | 438 | 0.0% |
| 7C | MONTICELLO ACADEMY | 1,979,842 | 1,933,474 | (46,368) | 75,200 | 124,269 | 49,069 | 2,701 | 0.1% |
| 8C | MOUNTAINVILLE ACADEMY | 1,934,068 | 1,888,391 | (45,677) | 75,000 | 123,939 | 48,939 | 3,262 | 0.2% |
| 7F | EXCELSIOR ACADEMY | 1,722,296 | 1,681,200 | (41,096) | 68,300 | 112,867 | 44,567 | 3,471 | 0.2% |
| 83 | ACADEMY FOR MATH ENGINE | 1,708,091 | 1,683,693 | (24,398) | 49,100 | 81,139 | 32,039 | 7,641 | 0.4% |
| 4D | SYRACUSE ARTS ACADEMY | 2,679,836 | 2,624,395 | (55,441) | 102,600 | 169,548 | 66,948 | 11,507 | 0.4% |
| 3G | BEAR RIVER CHARTER SCHO | 457,983 | 448,658 | (9,325) | 18,000 | 29,745 | 11,745 | 2,420 | 0.5% |
| 2B | LINCOLN ACADEMY | 1,840,605 | 1,811,640 | (28,965) | 68,400 | 113,032 | 44,632 | 15,667 | 0.8% |
| 8F | HAWTHORN ACADEMY | 2,128,533 | 2,094,209 | (34,324) | 81,100 | 134,019 | 52,919 | 18,595 | 0.8% |
| A6 | NORTH DAVIS PREPARATORY | 2,635,974 | 2,593,988 | (41,986) | 100,800 | 166,574 | 65,774 | 23,788 | 0.9% |
| 8E | MERIT COLLEGE PREPARATO | 1,768,223 | 1,768,222 | (1) | 25,700 | 42,470 | 16,770 | 16,769 | 0.9% |
| 1G | OQUIRRH MOUNTAIN CHARTE | 1,939,923 | 1,907,930 | (31,993) | 76,200 | 125,922 | 49,722 | 17,729 | 0.9% |
| A8 | EAST HOLLYWOOD HIGH | 1,074,949 | 1,066,333 | (8,616) | 30,900 | 51,063 | 20,163 | 11,547 | 1.0% |
| 9H | Pioneer High | 1,666,345 | 1,657,929 | (8,416) | 47,900 | 79,156 | 31,256 | 22,840 | 1.3% |
| 9B | NAVIGATOR POINTE ACADEM | $1,344,267 | $1,330,224 | ($14,043) | $51,800 | $85,600 | $33,800 | $19,757 | 1.42% |
| 5E | EDITH BOWEN LABORATORY | 744,464 | 735,253 | (9,211) | 30,400 | 50,237 | 19,837 | 10,626 | 1.4% |
| 7B | REAGAN ACADEMY | 1,713,077 | 1,695,779 | (17,298) | 67,400 | 111,380 | 43,980 | 26,682 | 1.5% |
| 2F | ROCKWELL CHARTER HIGH S | 2,221,500 | 2,221,501 | 1 | 53,500 | 88,410 | 34,910 | 34,911 | 1.5% |
| 7G | SUMMIT ACADEMY HIGH SCH | 2,091,670 | 2,091,669 | (1) | 49,900 | 82,461 | 32,561 | 32,560 | 1.5% |
| A2 | RANCHES ACADEMY | 896,950 | 887,804 | (9,146) | 36,400 | 60,152 | 23,752 | 14,606 | 1.6% |
| 6H | Promontory School | 1,188,069 | 1,177,916 | (10,153) | 46,400 | 76,677 | 30,277 | 20,124 | 1.6% |
| 2C | INTECH COLLEGIATE HIGH SC | 629,819 | 629,819 | 0 | 18,100 | 29,911 | 11,811 | 11,811 | 1.8% |
| 9I | UT Career Path | 608,790 | 608,790 | 0 | 17,500 | 28,919 | 11,419 | 11,419 | 1.8% |
| 5B | NORTH STAR ACADEMY | 1,400,537 | 1,394,062 | (6,475) | 52,700 | 87,088 | 34,388 | 27,913 | 1.9% |
| 81 | WALDEN SCHOOL OF LIBERA | 1,431,610 | 1,431,610 | 0 | 44,300 | 73,207 | 28,907 | 28,907 | 2.0% |
| A7 | MOAB CHARTER SCHOOL | 281,348 | 279,742 | (1,606) | 11,600 | 19,169 | 7,569 | 5,963 | 2.0% |
| 8B | AMERICAN LEADERSHIP ACA | 4,829,618 | 4,819,466 | (10,152) | 168,100 | 277,788 | 109,688 | 99,536 | 2.0% |
| 4F | SALT LAKE CENTER FOR SCI | 1,186,574 | 1,186,572 | (2) | 37,800 | 62,465 | 24,665 | 24,663 | 2.0% |
| 1I | UT International | 328,312 | 328,312 | 0 | 10,400 | 17,186 | 6,786 | 6,786 | 2.0% |
| 4B | WASATCH PEAK ACADEMY | 1,013,346 | 1,008,493 | (4,853) | 41,600 | 68,745 | 27,145 | 22,292 | 2.1% |
| 2H | UTAH CONNECTIONS ACADE | 2,032,778 | 2,032,779 | 1 | 68,900 | 113,858 | 44,958 | 44,959 | 2.1% |
| 5C | LEGACY PREPARATORY ACA | 2,821,510 | 2,815,970 | (5,540) | 107,300 | 177,315 | 70,015 | 64,475 | 2.2% |
| 5F | UTAH VIRTUAL ACADEMY | 5,632,122 | 5,632,122 | 0 | 195,600 | 323,232 | 127,632 | 127,632 | 2.2% |
| 8H | Valley Arts | 1,041,496 | 1,037,741 | (3,755) | 41,900 | 69,240 | 27,340 | 23,585 | 2.2% |
| 97 | SALT LAKE ARTS ACADEMY | 1,064,187 | 1,064,188 | 1 | 39,000 | 64,448 | 25,448 | 25,449 | 2.3% |
| 9D | CANYON RIM ACADEMY | 1,289,621 | 1,285,991 | (3,630) | 52,800 | 87,253 | 34,453 | 30,823 | 2.3% |
| 9E | PROVIDENCE HALL | 4,242,782 | 4,242,782 | 0 | 154,300 | 254,983 | 100,683 | 100,683 | 2.3% |
| A4 | SUMMIT ACADEMY | 2,562,020 | 2,560,113 | (1,907) | 99,800 | 164,921 | 65,121 | 63,214 | 2.4% |
| 6C | LIBERTY ACADEMY | 1,010,947 | 1,010,945 | (2) | 38,300 | 63,291 | 24,991 | 24,989 | 2.4% |
| 6D | NOAH WEBSTER ACADEMY | 1,399,603 | 1,399,602 | (1) | 53,600 | 88,575 | 34,975 | 34,974 | 2.4% |
| 7E | GATEWAY PREPARATORY AC | 1,681,929 | 1,681,930 | 1 | 63,100 | 104,274 | 41,174 | 41,175 | 2.4% |
| 2G | VISTA AT ENTRADA SCHOOL | 2,081,109 | 2,081,108 | (1) | 79,900 | 132,036 | 52,136 | 52,135 | 2.4% |
| 9G | ALIANZA ACADEMY | 1,190,916 | 1,190,918 | 2 | 45,700 | 75,520 | 29,820 | 29,822 | 2.4% |
| 4I | Mana | 1,717,716 | 1,717,715 | (1) | 65,000 | 107,414 | 42,414 | 42,413 | 2.4% |
| 2D | CHANNING HALL | 1,669,172 | 1,669,172 | 0 | 65,800 | 108,736 | 42,936 | 42,936 | 2.5% |
| 5G | QUAIL RUN PRIMARY SCHOO | 1,091,592 | 1,091,595 | 3 | 45,200 | 74,694 | 29,494 | 29,497 | 2.6% |
| 4H | Aristotle Aca | 539,897 | 539,895 | (2) | 22,000 | 36,355 | 14,355 | 14,353 | 2.6% |
| 3I | Leadership | 1,091,908 | 1,091,908 | 0 | 45,000 | 74,363 | 29,363 | 29,363 | 2.6% |
| 5I | Voyage | 1,223,378 | 1,223,378 | 0 | 50,000 | 82,626 | 32,626 | 32,626 | 2.6% |
| 7I | WSU | 65,372 | 65,372 | 0 | 4,100 | 6,775 | 2,675 | 2,675 | 3.9% |

***FY14 Prior-Year ADM plus Fall Enrollment Growth and Administrative Cost Scenarios***
*Sorted by Percent Difference*

| ID | LEA | K-12 | | | Administrative Costs | | | Total Funds | Percent |
|---|---|---|---|---|---|---|---|---|---|
| | | Current | Scenario | Scenario - Current | Current | Scenario | Scenario - Current | Difference | Difference |
| | **Total Charters:** | $152,440,322 | $148,858,000 | ($3,582,322) | $5,490,000 | $9,072,321 | $3,582,321 | ($1) | 0.0% |
| 92 | UINTAH RIVER HIGH | 257,431 | 220,820 | (36,611) | 7,400 | 12,229 | 4,829 | (31,782) | -12.00% |
| 9F | OPEN HIGH SCHOOL OF UTAH | 1,303,333 | 1,116,553 | (186,780) | 38,900 | 64,283 | 25,383 | (161,397) | -12.0% |
| 87 | CITY ACADEMY | 781,600 | 689,118 | (92,482) | 23,500 | 38,834 | 15,334 | (77,148) | -9.6% |
| 3D | SPECTRUM ACADEMY | 1,574,244 | 1,404,476 | (169,768) | 54,200 | 89,566 | 35,366 | (134,402) | -8.3% |
| 86 | PINNACLE CANYON ACADEMY | 1,507,336 | 1,377,950 | (129,386) | 51,700 | 85,435 | 33,735 | (95,651) | -6.1% |
| A3 | DAVINCI ACADEMY | 3,082,507 | 2,837,251 | (245,256) | 109,700 | 181,281 | 71,581 | (173,675) | -5.4% |
| 1E | GUADALUPE SCHOOL | 326,862 | 301,528 | (25,334) | 13,500 | 22,309 | 8,809 | (16,525) | -4.9% |
| 7H | Pacific Heritage | 1,036,973 | 966,202 | (70,771) | 39,700 | 65,605 | 25,905 | (44,866) | -4.2% |
| 4G | MARIA MONTESSORI ACADEM | 1,358,849 | 1,267,127 | (91,722) | 54,400 | 89,897 | 35,497 | (56,225) | -4.0% |
| 7D | SALT LAKE SCHOOL FOR THE | 1,015,810 | 965,906 | (49,904) | 29,200 | 48,254 | 19,054 | (30,850) | -3.0% |
| 2E | KARL G MAESER PREPARATO | 2,021,878 | 1,918,205 | (103,673) | 61,900 | 102,291 | 40,391 | (63,282) | -3.0% |
| 98 | FAST FORWARD HIGH | 827,954 | 790,615 | (37,339) | 23,800 | 39,330 | 15,530 | (21,809) | -2.6% |
| 3B | BEEHIVE SCIENCE & TECHNO | 901,966 | 859,200 | (42,766) | 29,400 | 48,584 | 19,184 | (23,582) | -2.5% |
| 1C | ODYSSEY CHARTER SCHOOL | 1,305,129 | 1,236,302 | (68,827) | 53,600 | 88,575 | 34,975 | (33,852) | -2.5% |
| 8G | GOOD FOUNDATION ACADEM | 1,146,990 | 1,087,702 | (59,288) | 46,800 | 77,338 | 30,538 | (28,750) | -2.4% |
| 8D | OPEN CLASSROOM | 980,355 | 931,631 | (48,724) | 38,500 | 63,622 | 25,122 | (23,602) | -2.3% |
| 5H | High Mark | 1,827,936 | 1,740,058 | (87,878) | 67,700 | 111,875 | 44,175 | (43,703) | -2.3% |
| 1F | QUEST ACADEMY | 2,435,247 | 2,321,638 | (113,609) | 95,100 | 157,154 | 62,054 | (51,555) | -2.0% |
| 3F | VENTURE ACADEMY | 2,079,685 | 1,992,503 | (87,182) | 72,400 | 119,642 | 47,242 | (39,940) | -1.9% |
| 90 | TUACAHN HIGH SCHOOL FOR | 1,325,423 | 1,278,021 | (47,402) | 38,100 | 62,961 | 24,861 | (22,541) | -1.7% |
| 95 | TIMPANOGOS ACADEMY | 1,109,535 | 1,063,933 | (45,602) | 43,700 | 72,215 | 28,515 | (17,087) | -1.5% |
| 82 | FREEDOM ACADEMY | 2,510,679 | 2,412,246 | (98,433) | 95,500 | 157,815 | 62,315 | (36,118) | -1.4% |
| 3E | CS LEWIS ACADEMY | 1,110,607 | 1,065,148 | (45,459) | 44,900 | 74,198 | 29,298 | (16,161) | -1.4% |
| 3H | ENDEAVOR HALL | 1,551,197 | 1,491,234 | (59,963) | 61,400 | 101,465 | 40,065 | (19,898) | -1.2% |
| 9C | PARADIGM HIGH SCHOOL | 2,097,891 | 2,034,095 | (63,796) | 64,400 | 106,422 | 42,022 | (21,774) | -1.0% |
| 89 | SOLDIER HOLLOW CHARTER | 735,360 | 710,139 | (25,221) | 29,500 | 48,749 | 19,249 | (5,972) | -0.8% |
| 4C | LAKEVIEW ACADEMY | 2,410,027 | 2,334,542 | (75,485) | 93,100 | 153,849 | 60,749 | (14,736) | -0.6% |
| 74 | AMERICAN PREPARATORY AC | 9,245,405 | 8,976,232 | (269,173) | 343,000 | 566,814 | 223,814 | (45,359) | -0.5% |
| A9 | SUCCESS ACADEMY | 1,304,550 | 1,273,049 | (31,501) | 37,500 | 61,969 | 24,469 | (7,032) | -0.5% |
| 1B | UTAH COUNTY ACADEMY OF | 1,398,478 | 1,364,869 | (33,609) | 40,200 | 66,431 | 26,231 | (7,378) | -0.5% |
| 68 | OGDEN PREPARATORY ACAD | 2,737,062 | 2,658,925 | (78,137) | 104,100 | 172,027 | 67,927 | (10,210) | -0.4% |
| A1 | NO UT ACAD FOR MATH ENGI | 1,739,400 | 1,695,840 | (43,560) | 54,800 | 90,558 | 35,758 | (7,802) | -0.4% |
| 94 | THOMAS EDISON - LEA | 3,364,086 | 3,266,193 | (97,893) | 131,500 | 217,306 | 85,806 | (12,087) | -0.3% |
| 1D | RENAISSANCE ACADEMY | 1,808,803 | 1,757,035 | (51,768) | 71,400 | 117,990 | 46,590 | (5,178) | -0.3% |
| 6G | WEILENMANN SCHOOL OF DI | 1,481,708 | 1,438,504 | (43,204) | 58,000 | 95,846 | 37,846 | (5,358) | -0.3% |
| 93 | JOHN HANCOCK CHARTER SC | 470,218 | 456,981 | (13,237) | 18,500 | 30,572 | 12,072 | (1,165) | -0.2% |
| A5 | ITINERIS EARLY COLLEGE HIC | 1,033,204 | 1,011,815 | (21,389) | 29,700 | 49,080 | 19,380 | (2,009) | -0.2% |
| 5D | GEORGE WASHINGTON ACAD | 2,567,471 | 2,496,427 | (71,044) | 102,400 | 169,218 | 66,818 | (4,226) | -0.2% |
| 3C | ENTHEOS ACADEMY | 2,724,219 | 2,656,049 | (68,170) | 103,600 | 171,201 | 67,601 | (569) | 0.0% |

**FY14 Local Replacement School District Contribution Scenario**

| | Current 25.00% | Scenario 100.00% | Change Total | Change Percent |
|---|---|---|---|---|
| Total Districts | $ 11,394,765 | $ 45,579,060 | $ 34,184,295 | 300.0% |
| 1 Alpine | $ 1,241,098 | $ 4,964,393 | $ 3,723,294 | 300.0% |
| 2 Beaver | 3,514 | 14,055 | 10,542 | 300.0% |
| 3 Box Elder | 182,181 | 728,724 | 546,543 | 300.0% |
| 4 Cache | 212,302 | 849,209 | 636,907 | 300.0% |
| 5 Carbon | 137,311 | 549,246 | 411,934 | 300.0% |
| 6 Daggett | 1,622 | 6,487 | 4,865 | 300.0% |
| 7 Davis | 1,440,839 | 5,763,357 | 4,322,518 | 300.0% |
| 8 Duchesne | 13,785 | 55,141 | 41,356 | 300.0% |
| 9 Emery | 17,029 | 68,115 | 51,086 | 300.0% |
| 10 Garfield | 4,809 | 19,235 | 14,426 | 300.0% |
| 11 Grand | 34,598 | 138,393 | 103,794 | 300.0% |
| 12 Granite | 1,500,938 | 6,003,752 | 4,502,814 | 300.0% |
| 13 Iron | 170,473 | 681,893 | 511,420 | 300.0% |
| 14 Jordan | 1,708,284 | 6,833,134 | 5,124,851 | 300.0% |
| 15 Juab | 8,920 | 35,679 | 26,760 | 300.0% |
| 16 Kane | 5,406 | 21,624 | 16,218 | 300.0% |
| 17 Millard | 2,973 | 11,893 | 8,920 | 300.0% |
| 18 Morgan | 5,649 | 22,597 | 16,948 | 300.0% |
| 19 Nebo | 533,562 | 2,134,247 | 1,600,685 | 300.0% |
| 20 No. Sanpete | 16,068 | 64,273 | 48,205 | 300.0% |
| 21 No. Summit | 7,028 | 28,111 | 21,083 | 300.0% |
| 22 Park City | 127,040 | 508,160 | 381,120 | 300.0% |
| 23 Piute | 1,083 | 4,333 | 3,250 | 300.0% |
| 24 Rich | 811 | 3,244 | 2,433 | 300.0% |
| 25 San Juan | 6,217 | 24,867 | 18,651 | 300.0% |
| 26 Sevier | 10,535 | 42,142 | 31,606 | 300.0% |
| 27 So. Sanpete | 13,828 | 55,311 | 41,483 | 300.0% |
| 28 So. Summit | 17,029 | 68,115 | 51,086 | 300.0% |
| 29 Tintic | - | - | - | - |
| 30 Tooele | 108,122 | 432,488 | 324,366 | 300.0% |
| 31 Uintah | 33,517 | 134,068 | 100,551 | 300.0% |
| 32 Wasatch | 98,118 | 392,473 | 294,355 | 300.0% |
| 33 Washington | 787,770 | 3,151,079 | 2,363,310 | 300.0% |
| 34 Wayne | 1,562 | 6,247 | 4,686 | 300.0% |
| 35 Weber | 534,299 | 2,137,196 | 1,602,897 | 300.0% |
| 36 Salt Lake | 691,693 | 2,766,771 | 2,075,078 | 300.0% |
| 37 Ogden | 379,206 | 1,516,825 | 1,137,619 | 300.0% |
| 38 Provo | 330,037 | 1,320,148 | 990,111 | 300.0% |
| 39 Logan | 217,320 | 869,278 | 651,959 | 300.0% |
| 40 Murray | 35,409 | 141,636 | 106,227 | 300.0% |
| 42 Canyons | 752,780 | 3,011,120 | 2,258,340 | 300.0% |

**FY14 Local Replacement School District Contribution Scenario, per Pupil**

| | Current 25.00% | Scenario 100.00% | Change Total | Change Percent |
|---|---|---|---|---|
| Total Districts | $ 224 | $ 897 | $ 673 | 300.0% |
| 1 Alpine | $ 158 | $ 632 | $ 474 | 300.0% |
| 2 Beaver | 270 | 1,081 | 811 | 300.0% |
| 3 Box Elder | 270 | 1,081 | 811 | 300.0% |
| 4 Cache | 149 | 595 | 446 | 300.0% |
| 5 Carbon | 270 | 1,081 | 811 | 300.0% |
| 6 Daggett | 270 | 1,081 | 811 | 300.0% |
| 7 Davis | 227 | 907 | 680 | 300.0% |
| 8 Duchesne | 270 | 1,081 | 811 | 300.0% |
| 9 Emery | 270 | 1,081 | 811 | 300.0% |
| 10 Garfield | 267 | 1,069 | 801 | 300.0% |
| 11 Grand | 270 | 1,081 | 811 | 300.0% |
| 12 Granite | 246 | 984 | 738 | 300.0% |
| 13 Iron | 213 | 851 | 638 | 300.0% |
| 14 Jordan | 270 | 1,081 | 811 | 300.0% |
| 15 Juab | 270 | 1,081 | 811 | 300.0% |
| 16 Kane | 270 | 1,081 | 811 | 300.0% |
| 17 Millard | 270 | 1,081 | 811 | 300.0% |
| 18 Morgan | 84 | 337 | 253 | 300.0% |
| 19 Nebo | 153 | 612 | 459 | 300.0% |
| 20 No. Sanpete | 240 | 959 | 719 | 300.0% |
| 21 No. Summit | 270 | 1,081 | 811 | 300.0% |
| 22 Park City | 270 | 1,081 | 811 | 300.0% |
| 23 Piute | 155 | 619 | 464 | 300.0% |
| 24 Rich | 270 | 1,081 | 811 | 300.0% |
| 25 San Juan | 270 | 1,081 | 811 | 300.0% |
| 26 Sevier | 234 | 936 | 702 | 300.0% |
| 27 So. Sanpete | 184 | 737 | 553 | 300.0% |
| 28 So. Summit | 270 | 1,081 | 811 | 300.0% |
| 29 Tintic | - | - | - | - |
| 30 Tooele | 125 | 499 | 375 | 300.0% |
| 31 Uintah | 270 | 1,081 | 811 | 300.0% |
| 32 Wasatch | 270 | 1,081 | 811 | 300.0% |
| 33 Washington | 266 | 1,066 | 799 | 300.0% |
| 34 Wayne | 260 | 1,041 | 781 | 300.0% |
| 35 Weber | 211 | 845 | 634 | 300.0% |
| 36 Salt Lake | 270 | 1,081 | 811 | 300.0% |
| 37 Ogden | 238 | 952 | 714 | 300.0% |
| 38 Provo | 244 | 975 | 731 | 300.0% |
| 39 Logan | 270 | 1,081 | 811 | 300.0% |
| 40 Murray | 270 | 1,081 | 811 | 300.0% |
| 42 Canyons | 270 | 1,081 | 811 | 300.0% |

**FY14 Pre-Final K12 and Programs Affected by K12: Actual and Scenario Differences**

| ID | LEA | K-12 | Pro Staff | WPU Flex | Gifted | Board Local | Voted Local | Total | Percent |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Alpine | $6,250,565 | $523,573 | $5,260 | $175 | $235,966 | $943,862 | $7,959,401 | 3.41% |
| 2 | Beaver | 11,190 | 1,040 | (1,783) | (186) | 0 | 0 | 10,261 | 0.17% |
| 3 | Box Elder | 1,099,461 | 106,896 | 1,358 | 237 | 41,506 | 62,259 | 1,311,717 | 3.79% |
| 4 | Cache | 1,512,147 | 139,459 | 1,529 | 227 | 57,086 | 228,343 | 1,938,791 | 3.75% |
| 5 | Carbon | 281,890 | 25,056 | (905) | (2) | 0 | 0 | 306,039 | 2.92% |
| 6 | Daggett | 21,198 | 1,773 | (228) | 7 | 0 | 0 | 22,750 | 1.63% |
| 7 | Davis | 6,619,081 | 648,001 | 13,039 | 1,222 | 249,877 | 999,508 | 8,530,728 | 3.86% |
| 8 | Duchesne | 760,187 | 67,108 | 2,745 | 512 | 0 | 0 | 830,552 | 5.02% |
| 9 | Emery | 228,963 | 21,534 | (407) | 50 | 0 | 0 | 250,140 | 2.91% |
| 10 | Garfield | 47,248 | 4,921 | (1,154) | (48) | 0 | 0 | 50,967 | 0.93% |
| 11 | Grand | 169,513 | 15,709 | 104 | 70 | 0 | 0 | 185,396 | 3.91% |
| 12 | Granite | 8,077,134 | 803,643 | 28,405 | 3,509 | 304,919 | 1,219,679 | 10,437,289 | 5.03% |
| 13 | Iron | 653,321 | 64,927 | (1,787) | (126) | 24,664 | 49,327 | 790,326 | 2.88% |
| 14 | Jordan | 4,587,586 | 400,217 | 3,590 | 154 | 149,924 | 599,696 | 5,741,167 | 3.45% |
| 15 | Juab | 192,073 | 15,811 | (107) | (2) | 7,250 | 7,250 | 222,275 | 3.27% |
| 16 | Kane | 72,431 | 6,752 | (1,128) | (47) | 0 | 0 | 78,008 | 1.26% |
| 17 | Millard | 105,501 | 10,773 | (2,434) | (205) | 0 | 0 | 113,635 | 1.12% |
| 18 | Morgan | 161,617 | 13,922 | (393) | (94) | 0 | 0 | 175,052 | 2.20% |
| 19 | Nebo | 3,060,773 | 277,508 | 2,806 | 626 | 115,547 | 375,528 | 3,832,788 | 3.76% |
| 20 | North Sanpete | 345,430 | 31,559 | 996 | 213 | 13,040 | 52,159 | 443,397 | 5.83% |
| 21 | North Summit | 15,694 | 1,646 | (1,051) | (104) | 0 | 0 | 16,185 | 0.39% |
| 22 | Park City | 295,573 | 34,730 | (465) | (154) | 0 | 0 | 329,684 | 2.27% |
| 23 | Piute | 4,908 | 419 | (537) | (31) | 184 | 152 | 5,095 | 0.26% |
| 24 | Rich | 38,005 | 3,634 | (294) | (4) | 0 | 0 | 41,341 | 1.52% |
| 25 | San Juan | 89,447 | 8,550 | (2,540) | (256) | 3,377 | 13,507 | 112,085 | 0.82% |
| 26 | Sevier | 178,515 | 19,068 | (2,957) | (321) | 6,738 | 10,108 | 211,151 | 1.30% |
| 27 | South Sanpete | 289,071 | 29,778 | (402) | 30 | 10,913 | 43,653 | 373,043 | 3.13% |
| 28 | South Summit | 6,955 | 679 | (1,529) | (182) | 0 | 0 | 5,923 | 0.12% |
| 29 | Tintic | 322 | 27 | (525) | (32) | 12 | 49 | (147) | -0.01% |
| 30 | Tooele | 1,622,680 | 143,244 | 3,622 | 644 | 61,258 | 92,500 | 1,923,948 | 4.23% |
| 31 | Uintah | 819,040 | 66,714 | 1,851 | 272 | 0 | 0 | 887,877 | 3.91% |
| 32 | Wasatch | 289,097 | 28,128 | (2,493) | (306) | 0 | 0 | 314,426 | 1.78% |
| 33 | Washington | 1,336,929 | 132,243 | (10,713) | (1,454) | 0 | 0 | 1,457,005 | 1.74% |
| 34 | Wayne | 0 | (1) | (861) | (65) | 1 | 0 | (926) | -0.03% |
| 35 | Weber | 2,596,681 | 248,102 | (3,707) | (59) | 98,027 | 275,213 | 3,214,257 | 3.25% |
| 36 | Salt Lake | 3,459,362 | 378,704 | 15,358 | 2,177 | 0 | 0 | 3,855,601 | 5.42% |
| 37 | Ogden | 1,364,168 | 120,117 | 3,470 | 471 | 51,498 | 165,438 | 1,705,162 | 4.55% |
| 38 | Provo | 2,515,050 | 208,730 | 13,295 | 1,915 | 94,945 | 340,379 | 3,174,314 | 7.19% |
| 39 | Logan | 201,328 | 19,575 | (3,052) | (459) | 0 | 0 | 217,392 | 1.19% |
| 40 | Murray | 497,526 | 52,946 | (235) | (72) | 0 | 0 | 550,165 | 2.81% |
| 42 | Canyons | 1,909,818 | 169,296 | (8,780) | (1,444) | 0 | 0 | 2,068,890 | 2.03% |
| | Charters | 0 | 0 | (46,960) | (6,858) | 0 | 0 | (53,819) | -0.02% |
| | **Statewide:** | **$51,787,478** | **$4,846,510** | **$0** | **$0** | **$1,526,732** | **$5,478,610** | **$63,639,331** | **3.03%** |

**FY14 Pre-Final K12 and Programs Affected by K12: Actual and Scenario Differences**

***Charter 1***

| ID | LEA | K-12 | Pro Staff | WPU Flex | Gifted | Total | Percent |
|---|---|---|---|---|---|---|---|
| 68 | Ogden Preparatory Academy | $0 | $0 | ($878) | ($126) | ($1,004) | -0.03% |
| 74 | American Preparatory Academy | 0 | 0 | (2,725) | (425) | (3,150) | -0.03% |
| 81 | Walden School | 0 | 0 | (473) | (66) | (539) | -0.03% |
| 82 | Freedom Academy | 0 | 0 | (642) | (115) | (757) | -0.03% |
| 83 | AMES | 0 | 0 | (405) | (78) | (483) | -0.03% |
| 86 | Pinnacle Canyon Academy | 0 | 0 | (808) | (70) | (878) | -0.05% |
| 87 | City Academy | 0 | 0 | (298) | (36) | (334) | -0.04% |
| 89 | Soldier Hollow School | 0 | 0 | (246) | (33) | (279) | -0.04% |
| 90 | Tuacahn Performing Arts | 0 | 0 | (316) | (61) | (377) | -0.03% |
| 92 | Uintah River High School | 0 | 0 | (108) | 0 | (109) | -0.04% |
| 93 | John Hancock | 0 | 0 | (153) | (21) | (174) | -0.03% |
| 94 | Thomas Edison | 0 | 0 | (1,063) | (155) | (1,218) | -0.03% |
| 95 | Timpanogos Academy | 0 | 0 | (236) | (51) | (287) | -0.02% |
| 97 | Salt Lake Arts Academy | 0 | 0 | (242) | (49) | (291) | -0.02% |
| 98 | Fast Forward High School | 0 | 0 | (254) | (39) | (294) | -0.03% |
| A1 | NUAMES | 0 | 0 | (520) | (80) | (600) | -0.03% |
| A2 | Ranches Academy | 0 | 0 | (283) | 0 | (283) | -0.03% |
| A3 | DaVinci Academy | 0 | 0 | (982) | (141) | (1,123) | -0.03% |
| A4 | Summit Academy | 0 | 0 | (680) | (118) | (798) | -0.03% |
| A5 | Itineris Early College High School | 0 | 0 | (182) | (47) | (229) | -0.02% |
| A6 | North Davis Preparatory Academy | 0 | 0 | (628) | (121) | (749) | -0.03% |
| A7 | Moab Community School | 0 | 0 | (74) | 0 | (74) | -0.02% |
| A8 | East Hollywood High School | 0 | 0 | (289) | (49) | (338) | -0.03% |
| A9 | SUCCESS Academy | 0 | 0 | (230) | (60) | (290) | -0.02% |
| 1B | UCAS | 0 | 0 | (346) | (64) | (409) | -0.03% |
| 2B | Lincoln Academy | 0 | 0 | (558) | (85) | (643) | -0.03% |
| 3B | Beehive Science & Technology | 0 | 0 | (210) | (41) | (251) | -0.03% |
| 4B | Wasatch Peak Academy | 0 | 0 | (258) | (47) | (305) | -0.03% |
| 5B | North Star Academy | 0 | 0 | (351) | (64) | (415) | -0.03% |
| 7B | Reagan Academy | 0 | 0 | (526) | (78) | (604) | -0.03% |
| 8B | American Leadership Academy | 0 | 0 | (1,502) | (222) | (1,724) | -0.03% |
| 9B | Navigator Pointe Academy | 0 | 0 | (397) | (62) | (459) | -0.03% |
| 1C | Odyssey Charter School | 0 | 0 | (357) | (60) | (417) | -0.03% |
| 2C | Intech Collegiate High School | 0 | 0 | (285) | (29) | (314) | -0.05% |
| 3C | Entheos Academy | 0 | 0 | (713) | (125) | (838) | -0.03% |
| 4C | Lakeview Academy | 0 | 0 | (578) | (110) | (688) | -0.03% |
| 5C | Legacy Preparatory Academy | 0 | 0 | (847) | (130) | (977) | -0.03% |
| 6C | Liberty Academy | 0 | 0 | (368) | (46) | (414) | -0.04% |
| 7C | Monticello Academy | 0 | 0 | (492) | (91) | (583) | -0.03% |
| 8C | Mountainville Academy | 0 | 0 | (515) | (89) | (604) | -0.03% |
| 9C | Paradigm High School | 0 | 0 | (509) | (97) | (606) | -0.03% |
| 1D | Renaissance Academy | 0 | 0 | (430) | (84) | (514) | -0.03% |
| 2D | Channing Hall | 0 | 0 | (450) | (77) | (527) | -0.03% |
| 3D | Spectrum Academy | 0 | 0 | (2,424) | (73) | (2,497) | -0.15% |
| 4D | Syracuse Arts Academy | 0 | 0 | (895) | (124) | (1,019) | -0.04% |
| 5D | George Washington Academy | 0 | 0 | (730) | (118) | (848) | -0.03% |
| 6D | Noah Webster Academy | 0 | 0 | (396) | (65) | (461) | -0.03% |

*Highlighted schools waived G&T funds.

**FY14 Pre-Final K12 and Programs Affected by K12: Actual and Scenario Differences**
***Charter 2***

| ID | LEA | K-12 | Pro Staff | WPU Flex | Gifted | Total | Percent |
|---|---|---|---|---|---|---|---|
| 7D | Salt Lake SPA | $0 | $0 | ($194) | ($47) | ($240) | -0.02% |
| 8D | Open Classroom | 0 | 0 | (285) | (45) | (330) | -0.03% |
| 9D | Canyon Rim Academy | 0 | 0 | (358) | (59) | (417) | -0.03% |
| 1E | Guadalupe Schools | 0 | 0 | (77) | 0 | (77) | -0.02% |
| 2E | Karl G. Maeser Prep Acaden | 0 | 0 | (478) | (93) | (571) | -0.03% |
| 3E | C.S. Lewis Academy | 0 | 0 | (348) | (52) | (400) | -0.03% |
| 4E | Dual Immersion Academy | 0 | 0 | (282) | (49) | (331) | -0.03% |
| 5E | Edith Bowen Lab School | 0 | 0 | (232) | (34) | (266) | -0.03% |
| 7E | Gateway Preparatory | 0 | 0 | (494) | (77) | (571) | -0.03% |
| 8E | Merit College Prep Academy | 0 | 0 | (699) | (82) | (781) | -0.04% |
| 9E | Providence Hall | 0 | 0 | (1,452) | (195) | (1,647) | -0.04% |
| 1F | Quest Academy | 0 | 0 | (774) | (112) | (886) | -0.03% |
| 2F | Rockwell Charter High Schoc | 0 | 0 | (684) | (103) | (787) | -0.03% |
| 3F | Venture Academy | 0 | 0 | (477) | (95) | (572) | -0.03% |
| 4F | SL Center for Science Ed. | 0 | 0 | (325) | (55) | (381) | -0.03% |
| 5F | Utah Virtual Academy | 0 | 0 | (2,953) | (259) | (3,212) | -0.05% |
| 6F | Early Light Academy | 0 | 0 | (611) | (91) | (702) | -0.03% |
| 7F | Excelsior Academy | 0 | 0 | (429) | (79) | (508) | -0.03% |
| 8F | Hawthorn Academy | 0 | 0 | (585) | (98) | (683) | -0.03% |
| 9F | Mountain Heights Academy | 0 | 0 | (321) | (60) | (381) | -0.03% |
| 1G | Jefferson Academy | 0 | 0 | (589) | (89) | (678) | -0.03% |
| 2G | Vista at Entrada | 0 | 0 | (728) | (96) | (824) | -0.04% |
| 3G | Bear River Charter School | 0 | 0 | (183) | (21) | (204) | -0.04% |
| 4G | Maria Montessori Academy | 0 | 0 | (357) | (62) | (419) | -0.03% |
| 5G | Canyon Grove Academy | 0 | 0 | (353) | (51) | (404) | -0.04% |
| 6G | Weilenmann School of Disco | 0 | 0 | (391) | (68) | (459) | -0.03% |
| 7G | Summit Academy High Scho | 0 | 0 | (538) | (96) | (634) | -0.03% |
| 8G | Good Foundations Academy | 0 | 0 | (301) | (53) | (354) | -0.03% |
| 9G | Alianza Academy | 0 | 0 | (356) | (54) | (410) | -0.03% |
| 2H | Utah Connections Academy | 0 | 0 | (541) | (93) | (634) | -0.03% |
| 3H | Endeavor Hall | 0 | 0 | (445) | (72) | (517) | -0.03% |
| 4H | Aristotle Academy | 0 | 0 | (228) | 0 | (228) | -0.04% |
| 5H | High Mark Charter School | 0 | 0 | (449) | (85) | (534) | -0.03% |
| 6H | Promontory School of EL | 0 | 0 | (313) | (55) | (368) | -0.03% |
| 7H | Pacific Heritage Academy | 0 | 0 | (275) | (48) | (323) | -0.03% |
| 8H | Valley Arts Academy | 0 | 0 | (290) | 0 | (290) | -0.03% |
| 9H | Pioneer High School | 0 | 0 | (376) | (76) | (452) | -0.03% |
| 1I | Utah International School | 0 | 0 | (131) | (15) | (146) | -0.04% |
| 3I | Leadership Learning Acaden | 0 | 0 | (318) | (50) | (368) | -0.03% |
| 4I | Mana Academy Charter Sch | 0 | 0 | (399) | (79) | (478) | -0.03% |
| 5I | Voyage Academy | 0 | 0 | (325) | (57) | (382) | -0.03% |
| 7I | WSU Charter Academy | 0 | 0 | (23) | (3) | (26) | -0.04% |
| 9I | Utah Career Path High Scho | 0 | 0 | (141) | (28) | (169) | -0.03% |

*Highlighted schools waived G&T funds.

The remarkable thing about the time series is the dramatic drop in dually enrolled students with the introduction of UTREX in 2012. Another interesting thing is the relative stability of the rate for the period in question.

| School Year | Dually Enrolled | Total Enrollment | % Dually Enrolled |
|---|---|---|---|
| 2009 | 2,526 | 550,603 | 0.46% |
| 2010 | 2,871 | 563,419 | 0.51% |
| 2011 | 2,547 | 575,063 | 0.44% |
| **2009-11** | **7,944** | **1,689,085** | **0.47%** |
| 2012 | 1,377 | 585,757 | 0.24% |
| 2013 | 1,431 | 599,643 | 0.24% |
| 2014 | 1,721 | 611,643 | 0.28% |
| **2012-14** | **4,529** | **1,797,043** | **0.25%** |

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## FY14 Local Replacement Current and Scenarios

| | Current Funds | | | | | | |
|---|---|---|---|---|---|---|---|
| | Local at 25% | State | Total | Scenario Local at 100% | Scenario-Current Difference | Scenario Local Actual per Pupil | Scenario-Current Difference |
| Total | $ 11,394,765 | $ 73,360,235 | $ 84,755,000 | $ 45,579,060 | $ 34,184,295 | $ 54,912,669 | $ 43,517,904 |
| 1 Alpine | $ 1,241,098 | $ 7,990,270 | $ 9,231,368 | $ 4,964,393 | $ 3,723,294 | $ 4,964,393 | $ 3,723,294 |
| 2 Beaver | 3,514 | 22,623 | 26,136 | 14,055 | 10,542 | 24,236 | 20,723 |
| 3 Box Elder | 182,181 | 1,172,892 | 1,355,073 | 728,724 | 546,543 | 832,244 | 650,063 |
| 4 Cache | 212,302 | 1,366,816 | 1,579,118 | 849,209 | 636,907 | 849,209 | 636,907 |
| 5 Carbon | 137,311 | 884,020 | 1,021,331 | 549,246 | 411,934 | 1,011,774 | 874,463 |
| 6 Daggett | 1,622 | 10,441 | 12,063 | 6,487 | 4,865 | 10,911 | 9,289 |
| 7 Davis | 1,440,839 | 9,276,217 | 10,717,056 | 5,763,357 | 4,322,518 | 5,763,357 | 4,322,518 |
| 8 Duchesne | 13,785 | 88,750 | 102,535 | 55,141 | 41,356 | 118,646 | 104,860 |
| 9 Emery | 17,029 | 109,632 | 126,661 | 68,115 | 51,086 | 173,478 | 156,449 |
| 10 Garfield | 4,809 | 30,959 | 35,768 | 19,235 | 14,426 | 19,235 | 14,426 |
| 11 Grand | 34,598 | 222,745 | 257,343 | 138,393 | 103,794 | 171,530 | 136,932 |
| 12 Granite | 1,500,938 | 9,663,136 | 11,164,074 | 6,003,752 | 4,502,814 | 6,003,752 | 4,502,814 |
| 13 Iron | 170,473 | 1,097,518 | 1,267,991 | 681,893 | 511,420 | 681,893 | 511,420 |
| 14 Jordan | 1,708,284 | 10,998,041 | 12,706,324 | 6,833,134 | 5,124,851 | 8,296,861 | 6,588,577 |
| 15 Juab | 8,920 | 57,426 | 66,346 | 35,679 | 26,760 | 40,369 | 31,450 |
| 16 Kane | 5,406 | 34,804 | 40,210 | 21,624 | 16,218 | 40,746 | 35,340 |
| 17 Millard | 2,973 | 19,142 | 22,115 | 11,893 | 8,920 | 30,986 | 28,012 |
| 18 Morgan | 5,649 | 36,370 | 42,019 | 22,597 | 16,948 | 22,597 | 16,948 |
| 19 Nebo | 533,562 | 3,435,104 | 3,968,666 | 2,134,247 | 1,600,685 | 2,134,247 | 1,600,685 |
| 20 No. Sanpete | 16,068 | 103,449 | 119,518 | 64,273 | 48,205 | 64,273 | 48,205 |
| 21 No. Summit | 7,028 | 45,245 | 52,273 | 28,111 | 21,083 | 84,793 | 77,765 |
| 22 Park City | 127,040 | 817,892 | 944,932 | 508,160 | 381,120 | 2,367,318 | 2,240,278 |
| 23 Piute | 1,083 | 6,974 | 8,057 | 4,333 | 3,250 | 4,333 | 3,250 |
| 24 Rich | 811 | 5,221 | 6,031 | 3,244 | 2,433 | 11,368 | 10,557 |
| 25 San Juan | 6,217 | 40,025 | 46,241 | 24,867 | 18,651 | 45,307 | 39,090 |
| 26 Sevier | 10,535 | 67,828 | 78,363 | 42,142 | 31,606 | 42,142 | 31,606 |
| 27 So. Sanpete | 13,828 | 89,024 | 102,851 | 55,311 | 41,483 | 55,311 | 41,483 |
| 28 So. Summit | 17,029 | 109,632 | 126,661 | 68,115 | 51,086 | 260,798 | 243,769 |
| 29 Tintic | - | - | - | - | - | - | - |
| 30 Tooele | 108,122 | 696,097 | 804,219 | 432,488 | 324,366 | 432,488 | 324,366 |
| 31 Uintah | 33,517 | 215,784 | 249,301 | 134,068 | 100,551 | 296,282 | 262,765 |
| 32 Wasatch | 98,118 | 631,691 | 729,809 | 392,473 | 294,355 | 923,852 | 825,734 |
| 33 Washington | 787,770 | 5,071,713 | 5,859,483 | 3,151,079 | 2,363,310 | 3,151,079 | 2,363,310 |
| 34 Wayne | 1,562 | 10,055 | 11,617 | 6,247 | 4,686 | 6,247 | 4,686 |
| 35 Weber | 534,299 | 3,439,852 | 3,974,151 | 2,137,196 | 1,602,897 | 2,137,196 | 1,602,897 |
| 36 Salt Lake | 691,693 | 4,453,162 | 5,144,855 | 2,766,771 | 2,075,078 | 4,693,868 | 4,002,176 |
| 37 Ogden | 379,206 | 2,441,355 | 2,820,562 | 1,516,825 | 1,137,619 | 1,516,825 | 1,137,619 |
| 38 Provo | 330,037 | 2,124,799 | 2,454,836 | 1,320,148 | 990,111 | 1,320,148 | 990,111 |
| 39 Logan | 217,320 | 1,399,118 | 1,616,437 | 869,278 | 651,959 | 1,108,027 | 890,707 |
| 40 Murray | 35,409 | 227,966 | 263,375 | 141,636 | 106,227 | 193,511 | 158,102 |
| 42 Canyons | 752,780 | 4,846,447 | 5,599,227 | 3,011,120 | 2,258,340 | 5,007,038 | 4,254,258 |

FY14 Statewide Levy Scenario

| ID | District | Tax Commission Actual Assessed Valuations | Actual Redevelopment Adjustments | Adjusted Assessed Valuations | Tax Rate | Collection Rate (5 Yr Avg) | Yield |
|---|---|---|---|---|---|---|---|
| 1 | Alpine | $16,203,603,413 | ($1,497,418,241) | $14,706,185,172 | 0.000456 | 100.00% | $6,706,020 |
| 2 | Beaver | 1,085,558,911 | 0 | 1,085,558,911 | 0.000456 | 100.00% | 495,015 |
| 3 | Box Elder | 3,997,479,529 | (525,444,139) | 3,472,035,390 | 0.000456 | 94.62% | 1,498,069 |
| 4 | Cache | 3,655,579,481 | (28,610,423) | 3,626,969,058 | 0.000456 | 100.00% | 1,653,898 |
| 5 | Carbon | 1,959,181,933 | (17,994,137) | 1,941,187,796 | 0.000456 | 100.00% | 885,182 |
| 6 | Daggett | 269,820,844 | 0 | 269,820,844 | 0.000456 | 100.00% | 123,038 |
| 7 | Davis | 16,337,970,059 | (642,666,450) | 15,695,303,609 | 0.000456 | 100.00% | 7,157,058 |
| 8 | Duchesne | 2,295,919,857 | 0 | 2,295,919,857 | 0.000456 | 100.00% | 1,046,939 |
| 9 | Emery | 2,037,155,907 | 0 | 2,037,155,907 | 0.000456 | 100.00% | 928,943 |
| 10 | Garfield | 594,159,881 | 0 | 594,159,881 | 0.000456 | 100.00% | 270,937 |
| 11 | Grand | 1,432,254,530 | 0 | 1,432,254,530 | 0.000456 | 100.00% | 653,108 |
| 12 | Granite | 21,078,380,098 | (822,834,632) | 20,255,545,466 | 0.000456 | 92.26% | 8,521,621 |
| 13 | Iron | 2,827,413,874 | (35,989,577) | 2,791,424,297 | 0.000456 | 100.00% | 1,272,889 |
| 14 | Jordan | 14,222,085,853 | (1,263,214,825) | 12,958,871,028 | 0.000456 | 95.52% | 5,644,511 |
| 15 | Juab | 786,892,545 | 0 | 786,892,545 | 0.000456 | 100.00% | 358,823 |
| 16 | Kane | 1,123,334,561 | 0 | 1,123,334,561 | 0.000456 | 100.00% | 512,241 |
| 17 | Millard | 2,149,863,314 | 0 | 2,149,863,314 | 0.000456 | 100.00% | 980,338 |
| 18 | Morgan | 856,634,515 | (5,334,202) | 851,300,313 | 0.000456 | 100.00% | 388,193 |
| 19 | Nebo | 5,707,804,546 | (126,648,860) | 5,581,155,686 | 0.000456 | 100.00% | 2,545,007 |
| 20 | No. Sanpete | 626,515,490 | (7,509,446) | 619,006,044 | 0.000456 | 100.00% | 282,267 |
| 21 | No. Summit | 914,061,147 | 0 | 914,061,147 | 0.000456 | 100.00% | 416,812 |
| 22 | Park City | 11,371,674,527 | (246,688,599) | 11,124,985,928 | 0.000456 | 100.00% | 5,072,994 |
| 23 | Piute | 103,842,114 | 0 | 103,842,114 | 0.000456 | 100.00% | 47,352 |
| 24 | Rich | 803,282,604 | (12,709,446) | 790,573,158 | 0.000456 | 100.00% | 360,501 |
| 25 | San Juan | 914,670,295 | 0 | 914,670,295 | 0.000456 | 100.00% | 417,090 |
| 26 | Sevier | 1,340,102,728 | 0 | 1,340,102,728 | 0.000456 | 100.00% | 611,087 |
| 27 | So. Sanpete | 519,406,214 | 0 | 519,406,214 | 0.000456 | 100.00% | 236,849 |
| 28 | So. Summit | 1,461,152,298 | 0 | 1,461,152,298 | 0.000456 | 100.00% | 666,285 |
| 29 | Tintic | 55,181,685 | 0 | 55,181,685 | 0.000456 | 100.00% | 25,163 |
| 30 | Tooele | 3,743,816,565 | (57,252,117) | 3,686,564,448 | 0.000456 | 100.00% | 1,681,073 |
| 31 | Uintah | 5,217,118,979 | (512,052) | 5,216,606,927 | 0.000456 | 100.00% | 2,378,773 |
| 32 | Wasatch | 3,713,011,242 | (1,249,985) | 3,711,761,257 | 0.000456 | 99.91% | 1,691,040 |
| 33 | Washington | 10,636,267,792 | (189,322,476) | 10,446,945,316 | 0.000456 | 100.00% | 4,763,807 |
| 34 | Wayne | 271,906,981 | 0 | 271,906,981 | 0.000456 | 100.00% | 123,990 |
| 35 | Weber | 7,816,208,260 | (315,290,960) | 7,500,917,300 | 0.000456 | 93.74% | 3,206,300 |
| 36 | Salt Lake | 19,118,099,209 | (2,150,840,050) | 16,967,259,159 | 0.000456 | 90.94% | 7,036,092 |
| 37 | Ogden | 3,782,374,610 | (751,353,094) | 3,031,021,516 | 0.000456 | 100.00% | 1,382,146 |
| 38 | Provo | 4,446,946,269 | (161,559,609) | 4,285,386,660 | 0.000456 | 100.00% | 1,954,136 |
| 39 | Logan | 2,154,309,727 | (351,513,767) | 1,802,795,960 | 0.000456 | 99.21% | 815,581 |
| 40 | Murray | 3,000,554,161 | (193,575,449) | 2,806,978,712 | 0.000456 | 94.35% | 1,207,663 |
| 42 | Canyons | 15,969,815,978 | (1,172,632,385) | 14,797,183,593 | 0.000456 | 83.55% | 5,637,549 |
| | **TOTAL** | **$196,601,412,526** | **($10,578,164,921)** | **$186,023,247,605** | ----- | ----- | $81,656,380 |

| | | | |
|---|---|---|---|
| **Target:** | **$** | **84,755,000** | 0.000456 |
| Distribution | $ | 92,726,100 | |
| Appropriation | $ | 84,755,000 | |
| Unallocated | $ | (7,971,100) | |

| | |
|---|---|
| Tax $250,000 residence/year: | $63 |
| Tax $250,000 non-residence or business/year: | $114 |

## FY14 To-and-From Pupil Transportation Data

| District | Students | | | Route Info | | | | | Costs | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2013 Total Enrollment | Students Transported | Percent Students Transported | Number of Routes | Total Daily To/From Miles | Total Daily To/From Minutes | Average Daily Miles Per Route | Average Daily Minutes Per Route | FY 2014 Estimated To/From Costs | Avg Cost Per Student |
| ID Total: | 557,651 | 161,034 | 28.88% | 12,748 | 228,367 | 841,510 | 17.9 | 66 | $ 101,407,638 | $630 |
| 1 Alpine | 72,419 | 20,469 | 28.26% | 1,376 | 20,826.5 | 82,179 | 15.1 | 60 | $ 12,468,881 | $609 |
| 2 Beaver | 1,579 | 260 | 16.47% | 14 | 368.4 | 946 | 26.3 | 68 | 229,326 | 882 |
| 3 Box Elder | 11,131 | 5,696 | 51.17% | 282 | 7,919.2 | 22,976 | 28.1 | 81 | 4,295,765 | 754 |
| 4 Cache | 16,038 | 8,982 | 56.00% | 461 | 13,138.9 | 46,652 | 28.5 | 101 | 5,622,019 | 626 |
| 5 Carbon | 3,369 | 1,590 | 47.20% | 68 | 2,183.7 | 6,999 | 32.1 | 103 | 1,136,304 | 715 |
| 6 Daggett | 194 | 159 | 81.96% | 7 | 196.9 | 407 | 28.1 | 58 | 107,049 | 673 |
| 7 Davis | 68,573 | 14,894 | 21.72% | 1,514 | 26,899.9 | 94,720 | 17.8 | 63 | 9,511,028 | 639 |
| 8 Duchesne | 5,021 | 2,588 | 51.54% | 112 | 3,475.5 | 8,777 | 31.0 | 78 | 1,418,151 | 548 |
| 9 Emery | 2,310 | 965 | 41.77% | 52 | 1,744.4 | 4,072 | 33.5 | 78 | 794,628 | 823 |
| 10 Garfield | 930 | 215 | 23.12% | 19 | 616.0 | 1,433 | 32.4 | 75 | 224,893 | 1,046 |
| 11 Grand | 1,455 | 710 | 48.80% | 43 | 1,478.2 | 4,381 | 34.4 | 102 | 297,390 | 419 |
| 12 Granite | 68,106 | 9,886 | 14.52% | 797 | 11,734.5 | 46,642 | 14.7 | 59 | 6,807,945 | 689 |
| 13 Iron | 8,685 | 3,438 | 39.59% | 217 | 4,382.2 | 12,567 | 20.2 | 58 | 2,095,299 | 609 |
| 14 Jordan | 52,855 | 12,460 | 23.57% | 1,933 | 27,035.8 | 113,748 | 14.0 | 59 | 8,604,781 | 691 |
| 15 Juab | 2,287 | 695 | 30.39% | 32 | 750.3 | 1,967 | 23.4 | 61 | 402,497 | 579 |
| 16 Kane | 1,212 | 616 | 50.83% | 28 | 647.0 | 1,919 | 23.1 | 69 | 432,414 | 702 |
| 17 Millard | 2,841 | 1,292 | 45.48% | 72 | 1,850.7 | 4,953 | 25.7 | 69 | 915,740 | 709 |
| 18 Morgan | 2,632 | 1,236 | 46.96% | 58 | 1,368.0 | 3,566 | 23.6 | 61 | 771,369 | 624 |
| 19 Nebo | 31,230 | 8,228 | 26.35% | 568 | 12,161.9 | 46,928 | 21.4 | 83 | 5,344,903 | 650 |
| 20 North Sanpete | 2,408 | 1,040 | 43.19% | 52 | 1,824.6 | 4,880 | 35.1 | 94 | 750,398 | 722 |
| 21 North Summit | 990 | 581 | 58.69% | 26 | 755.7 | 1,849 | 29.1 | 71 | 387,548 | 667 |
| 22 Park City | 4,630 | 2,386 | 51.53% | 260 | 4,050.1 | 14,087 | 15.6 | 54 | 1,182,063 | 495 |
| 23 Piute | 304 | 225 | 74.01% | 26 | 584.0 | 1,145 | 22.5 | 44 | 228,353 | 1,015 |
| 24 Rich | 479 | 307 | 64.09% | 14 | 530.6 | 928 | 37.9 | 66 | 257,847 | 840 |
| 25 San Juan | 3,020 | 1,518 | 50.26% | 115 | 5,353.7 | 12,361 | 46.6 | 107 | 2,281,997 | 1,503 |
| 26 Sevier | 4,585 | 1,793 | 39.11% | 88 | 1,784.1 | 6,736 | 20.3 | 77 | 1,088,471 | 607 |
| 27 South Sanpete | 3,162 | 1,346 | 42.57% | 115 | 1,761.4 | 5,901 | 15.3 | 51 | 620,308 | 461 |
| 28 South Summit | 1,495 | 656 | 43.88% | 34 | 634.1 | 1,833 | 18.7 | 54 | 351,774 | 536 |
| 29 Tintic | 250 | 29 | 11.60% | 4 | 103.6 | 159 | 25.9 | 40 | 59,331 | 2,046 |
| 30 Tooele | 14,107 | 3,686 | 26.13% | 413 | 8,755.6 | 34,062 | 21.2 | 82 | 3,048,335 | 827 |
| 31 Uintah | 7,591 | 4,306 | 56.73% | 220 | 4,191.1 | 13,905 | 19.1 | 63 | 2,231,526 | 518 |
| 32 Wasatch | 5,786 | 2,473 | 42.74% | 151 | 2,188.8 | 8,497 | 14.5 | 56 | 1,283,994 | 519 |
| 33 Washington | 27,099 | 9,105 | 33.60% | 745 | 14,097.8 | 46,417 | 18.9 | 62 | 5,478,574 | 602 |
| 34 Wayne | 501 | 308 | 61.48% | 15 | 550.0 | 1,069 | 36.7 | 71 | 218,586 | 710 |
| 35 Weber | 31,028 | 12,003 | 38.68% | 604 | 12,144.9 | 44,068 | 20.1 | 73 | 6,218,379 | 518 |
| 36 Salt Lake | 23,965 | 4,122 | 17.20% | 350 | 5,796.0 | 23,261 | 16.6 | 66 | 4,326,828 | 1,050 |
| 37 Ogden | 12,489 | 1,689 | 13.52% | 152 | 2,165.3 | 10,237 | 14.2 | 67 | 1,230,740 | 729 |
| 38 Provo | 14,799 | 5,960 | 40.27% | 357 | 3,889.9 | 20,069 | 10.9 | 56 | 1,506,356 | 253 |
| 39 Logan | 5,987 | 1,572 | 26.26% | 99 | 1,760.0 | 9,648 | 17.8 | 97 | 998,475 | 635 |
| 40 Murray | 6,435 | 1,046 | 16.25% | 69 | 822.4 | 4,780 | 11.9 | 69 | 370,080 | 354 |
| 42 Canyons | 33,674 | 10,504 | 31.19% | 1,186 | 15,845.2 | 69,786 | 13.4 | 59 | 5,807,293 | 553 |

## FY14 Current Basic Programs and Transportation Funds Scenario

| | | Actual Funds | | | | Scenario | Scenario - | Scenario - |
|---|---|---|---|---|---|---|---|---|
| ID | LEA | Basic Programs | Transportation | Guarantee | Total | Total | Actual | Actual |
| 1 | Alpine | $261,651,891 | $7,978,541 | $0 | $269,630,432 | $269,218,914 | ($411,518) | -0.2% |
| 2 | Beaver | 7,437,498 | 176,153 | 0 | 7,613,651 | 7,652,592 | 38,941 | 0.5% |
| 3 | Box Elder | 42,467,947 | 2,768,399 | 0 | 45,236,346 | 43,696,128 | (1,540,218) | -3.4% |
| 4 | Cache | 59,802,986 | 3,613,850 | 0 | 63,416,836 | 61,532,500 | (1,884,336) | -3.0% |
| 5 | Carbon | 14,155,410 | 754,327 | 0 | 14,909,737 | 14,564,787 | (344,950) | -2.3% |
| 6 | Daggett | 1,933,729 | 90,992 | 29,241 | 2,053,962 | 1,989,653 | (64,309) | -3.1% |
| 7 | Davis | 250,299,269 | 6,092,989 | 0 | 256,392,258 | 257,537,972 | 1,145,714 | 0.4% |
| 8 | Duchesne | 20,923,200 | 933,997 | 13,267 | 21,870,464 | 21,528,303 | (342,161) | -1.6% |
| 9 | Emery | 11,063,911 | 536,518 | 0 | 11,600,429 | 11,383,881 | (216,548) | -1.9% |
| 10 | Garfield | 6,740,084 | 173,327 | 69,786 | 6,983,197 | 6,935,009 | (48,188) | -0.7% |
| 11 | Grand | 6,386,800 | 219,542 | 0 | 6,606,342 | 6,571,507 | (34,835) | -0.5% |
| 12 | Granite | 248,074,531 | 4,369,846 | 0 | 252,444,377 | 255,248,895 | 2,804,518 | 1.1% |
| 13 | Iron | 34,167,837 | 1,365,661 | 0 | 35,533,498 | 35,155,977 | (377,521) | -1.1% |
| 14 | Jordan | 192,766,693 | 5,515,281 | 0 | 198,281,974 | 198,341,543 | 59,569 | 0.0% |
| 15 | Juab | 8,629,778 | 286,545 | 0 | 8,916,323 | 8,879,353 | (36,970) | -0.4% |
| 16 | Kane | 7,661,688 | 305,616 | 0 | 7,967,304 | 7,883,266 | (84,038) | -1.1% |
| 17 | Millard | 13,012,367 | 613,724 | 0 | 13,626,091 | 13,388,687 | (237,404) | -1.7% |
| 18 | Morgan | 9,603,534 | 521,691 | 0 | 10,125,225 | 9,881,270 | (243,955) | -2.4% |
| 19 | Nebo | 117,415,870 | 3,437,196 | 0 | 120,853,066 | 120,811,560 | (41,506) | 0.0% |
| 20 | North Sanpete | 9,487,661 | 508,322 | 22,945 | 10,018,928 | 9,762,046 | (256,882) | -2.6% |
| 21 | North Summit | 5,167,153 | 277,015 | 0 | 5,444,168 | 5,316,588 | (127,580) | -2.3% |
| 22 | Park City | 17,054,766 | 783,497 | 0 | 17,838,263 | 17,547,993 | (290,270) | -1.6% |
| 23 | Piute | 2,521,146 | 175,533 | 34,567 | 2,731,246 | 2,594,058 | (137,188) | -5.0% |
| 24 | Rich | 3,381,903 | 194,335 | 0 | 3,576,238 | 3,479,708 | (96,530) | -2.7% |
| 25 | San Juan | 15,108,298 | 1,484,676 | 222,704 | 16,815,678 | 15,545,233 | (1,270,445) | -7.6% |
| 26 | Sevier | 19,656,166 | 723,835 | 4,623 | 20,384,624 | 20,224,626 | (159,998) | -0.8% |
| 27 | South Sanpete | 13,516,830 | 425,393 | 32,898 | 13,975,121 | 13,907,739 | (67,382) | -0.5% |
| 28 | South Summit | 6,335,054 | 254,211 | 0 | 6,589,265 | 6,518,265 | (71,000) | -1.1% |
| 29 | Tintic | 2,391,258 | 50,431 | 38,101 | 2,479,790 | 2,460,414 | (19,376) | -0.8% |
| 30 | Tooele | 54,367,044 | 1,973,195 | 0 | 56,340,239 | 55,939,349 | (400,890) | -0.7% |
| 31 | Uintah | 28,444,731 | 1,452,502 | 0 | 29,897,233 | 29,267,358 | (629,875) | -2.1% |
| 32 | Wasatch | 21,937,272 | 848,475 | 0 | 22,785,747 | 22,571,702 | (214,045) | -0.9% |
| 33 | Washington | 102,905,502 | 3,522,408 | 0 | 106,427,910 | 105,881,549 | (546,361) | -0.5% |
| 34 | Wayne | 3,548,135 | 169,307 | 31,868 | 3,749,310 | 3,650,748 | (98,562) | -2.6% |
| 35 | Weber | 118,806,252 | 3,994,014 | 0 | 122,800,266 | 122,242,152 | (558,114) | -0.5% |
| 36 | Salt Lake | 89,430,154 | 2,788,200 | 0 | 92,218,354 | 92,016,491 | (201,863) | -0.2% |
| 37 | Ogden | 45,754,718 | 814,528 | 0 | 46,569,246 | 47,077,953 | 508,707 | 1.1% |
| 38 | Provo | 54,207,731 | 990,225 | 0 | 55,197,956 | 55,775,429 | 577,473 | 1.0% |
| 39 | Logan | 22,369,047 | 666,465 | 0 | 23,035,512 | 23,015,964 | (19,548) | -0.1% |
| 40 | Murray | 23,777,681 | 265,880 | 0 | 24,043,561 | 24,465,336 | 421,775 | 1.8% |
| 42 | Canyons | 123,937,975 | 3,731,958 | 0 | 127,669,933 | 127,522,285 | (147,645) | -0.1% |
| | Charters | 195,894,732 | 0 | | 195,894,732 | 201,560,046 | 5,665,314 | 2.9% |
| | **Statewide** | $2,294,196,232 | $65,848,600 | $500,000 | $2,360,544,832 | $2,360,544,829 | $0 | 0.0% |

## FY14 Current Basic Programs and Transportation Funds Scenario

| | | Actual Funds | | | | Scenario | Scenario - | Scenario - |
|---|---|---|---|---|---|---|---|---|
| ID | LEA | Basic Programs | Transportation | Guarantee | Total | Total | Actual | Actual |
| 68 | Ogden Preparator | $3,619,786 | $0 | $0 | $3,619,786 | $3,724,471 | $104,685 | 2.9% |
| 74 | American Prepara | 11,593,358 | 0 | 0 | 11,593,358 | 11,928,640 | 335,282 | 2.9% |
| 81 | Walden School | 1,890,817 | 0 | 0 | 1,890,817 | 1,945,500 | 54,683 | 2.9% |
| 82 | Freedom Acaden | 3,102,747 | 0 | 0 | 3,102,747 | 3,192,479 | 89,732 | 2.9% |
| 83 | AMES | 2,022,857 | 0 | 0 | 2,022,857 | 2,081,358 | 58,501 | 2.9% |
| 86 | Pinnacle Canyon | 2,347,901 | 0 | 0 | 2,347,901 | 2,415,803 | 67,902 | 2.9% |
| 87 | City Academy | 1,061,501 | 0 | 0 | 1,061,501 | 1,092,200 | 30,699 | 2.9% |
| 89 | Soldier Hollow Sc | 984,120 | 0 | 0 | 984,120 | 1,012,581 | 28,461 | 2.9% |
| 90 | Tuacahn Performi | 1,551,927 | 0 | 0 | 1,551,927 | 1,596,809 | 44,882 | 2.9% |
| 92 | Uintah River High | 348,105 | 0 | 0 | 348,105 | 358,172 | 10,067 | 2.9% |
| 93 | John Hancock | 640,650 | 0 | 0 | 640,650 | 659,178 | 18,528 | 2.9% |
| 94 | Thomas Edison | 4,406,810 | 0 | 0 | 4,406,810 | 4,534,256 | 127,446 | 2.9% |
| 95 | Timpanogos Acad | 1,353,270 | 0 | 0 | 1,353,270 | 1,392,407 | 39,137 | 2.9% |
| 97 | Salt Lake Arts Ac | 1,321,901 | 0 | 0 | 1,321,901 | 1,360,131 | 38,230 | 2.9% |
| 98 | Fast Forward Higl | 1,023,751 | 0 | 0 | 1,023,751 | 1,053,358 | 29,607 | 2.9% |
| A1 | NUAMES | 2,158,550 | 0 | 0 | 2,158,550 | 2,220,976 | 62,426 | 2.9% |
| A2 | Ranches Academ | 1,192,189 | 0 | 0 | 1,192,189 | 1,226,667 | 34,478 | 2.9% |
| A3 | DaVinci Academy | 3,975,948 | 0 | 0 | 3,975,948 | 4,090,933 | 114,985 | 2.9% |
| A4 | Summit Academy | 3,234,436 | 0 | 0 | 3,234,436 | 3,327,977 | 93,541 | 2.9% |
| A5 | Itineris Early Colle | 1,173,867 | 0 | 0 | 1,173,867 | 1,207,815 | 33,948 | 2.9% |
| A6 | North Davis Prepa | 3,276,463 | 0 | 0 | 3,276,463 | 3,371,219 | 94,756 | 2.9% |
| A7 | Moab Community | 361,653 | 0 | 0 | 361,653 | 372,112 | 10,459 | 2.9% |
| A8 | East Hollywood H | 1,269,123 | 0 | 0 | 1,269,123 | 1,305,826 | 36,703 | 2.9% |
| A9 | SUCCESS Acade | 1,459,037 | 0 | 0 | 1,459,037 | 1,501,233 | 42,196 | 2.9% |
| 1B | UCAS | 1,681,286 | 0 | 0 | 1,681,286 | 1,729,909 | 48,623 | 2.9% |
| 2B | Lincoln Academy | 2,372,769 | 0 | 0 | 2,372,769 | 2,441,390 | 68,621 | 2.9% |
| 3B | Beehive Science | 1,071,836 | 0 | 0 | 1,071,836 | 1,102,834 | 30,998 | 2.9% |
| 4B | Wasatch Peak Ac | 1,288,486 | 0 | 0 | 1,288,486 | 1,325,749 | 37,263 | 2.9% |
| 5B | North Star Acade | 1,748,199 | 0 | 0 | 1,748,199 | 1,798,757 | 50,558 | 2.9% |
| 7B | Reagan Academy | 2,233,538 | 0 | 0 | 2,233,538 | 2,298,132 | 64,594 | 2.9% |
| 8B | American Leaders | 6,212,566 | 0 | 0 | 6,212,566 | 6,392,235 | 179,669 | 2.9% |
| 9B | Navigator Pointe | 1,732,608 | 0 | 0 | 1,732,608 | 1,782,715 | 50,107 | 2.9% |
| 1C | Odyssey Charter | 1,659,565 | 0 | 0 | 1,659,565 | 1,707,560 | 47,995 | 2.9% |
| 2C | Intech Collegiate I | 871,619 | 0 | 0 | 871,619 | 896,826 | 25,207 | 2.9% |
| 3C | Entheos Academy | 3,380,053 | 0 | 0 | 3,380,053 | 3,477,805 | 97,752 | 2.9% |
| 4C | Lakeview Academ | 2,954,220 | 0 | 0 | 2,954,220 | 3,039,657 | 85,437 | 2.9% |
| 5C | Legacy Preparato | 3,625,790 | 0 | 0 | 3,625,790 | 3,730,649 | 104,859 | 2.9% |
| 6C | Liberty Academy | 1,385,373 | 0 | 0 | 1,385,373 | 1,425,438 | 40,065 | 2.9% |
| 7C | Monticello Acader | 2,476,496 | 0 | 0 | 2,476,496 | 2,548,117 | 71,621 | 2.9% |
| 8C | Mountainville Aca | 2,437,544 | 0 | 0 | 2,437,544 | 2,508,038 | 70,494 | 2.9% |
| 9C | Paradigm High Sc | 2,471,008 | 0 | 0 | 2,471,008 | 2,542,470 | 71,462 | 2.9% |
| 1D | Renaissance Aca | 2,198,615 | 0 | 0 | 2,198,615 | 2,262,199 | 63,584 | 2.9% |
| 2D | Channing Hall | 2,115,376 | 0 | 0 | 2,115,376 | 2,176,553 | 61,177 | 2.9% |
| 3D | Spectrum Acaden | 3,922,677 | 0 | 0 | 3,922,677 | 4,036,122 | 113,445 | 2.9% |
| 4D | Syracuse Arts Ac | 3,545,322 | 0 | 0 | 3,545,322 | 3,647,853 | 102,531 | 2.9% |
| 5D | George Washingt | 3,295,523 | 0 | 0 | 3,295,523 | 3,390,830 | 95,307 | 2.9% |
| 6D | Noah Webster Ac | 1,773,941 | 0 | 0 | 1,773,941 | 1,825,244 | 51,303 | 2.9% |

## FY14 Current Basic Programs and Transportation Funds Scenario

| | | Actual Funds | | | | Scenario | Scenario - | Scenario - |
|---|---|---|---|---|---|---|---|---|
| ID | LEA | Basic Programs | Transportation | Guarantee | Total | Total | Actual | Actual |
| 7D | Salt Lake SPA | $1,163,806 | $0 | $0 | $1,163,806 | $1,197,463 | $33,657 | 2.9% |
| 8D | Open Classroom | 1,325,570 | 0 | 0 | 1,325,570 | 1,363,906 | 38,336 | 2.9% |
| 9D | Canyon Rim Acad | 1,666,277 | 0 | 0 | 1,666,277 | 1,714,466 | 48,189 | 2.9% |
| 1E | Guadalupe Schoo | 401,459 | 0 | 0 | 401,459 | 413,069 | 11,610 | 2.9% |
| 2E | Karl G. Maeser Pr | 2,349,147 | 0 | 0 | 2,349,147 | 2,417,085 | 67,938 | 2.9% |
| 3E | C.S. Lewis Acade | 1,437,165 | 0 | 0 | 1,437,165 | 1,478,728 | 41,563 | 2.9% |
| 4E | Dual Immersion A | 1,344,932 | 0 | 0 | 1,344,932 | 1,383,828 | 38,896 | 2.9% |
| 5E | Edith Bowen Lab | 1,021,500 | 0 | 0 | 1,021,500 | 1,051,042 | 29,542 | 2.9% |
| 7E | Gateway Preparat | 2,175,276 | 0 | 0 | 2,175,276 | 2,238,185 | 62,909 | 2.9% |
| 8E | Merit College Pre | 2,391,051 | 0 | 0 | 2,391,051 | 2,460,201 | 69,150 | 2.9% |
| 9E | Providence Hall | 5,527,240 | 0 | 0 | 5,527,240 | 5,687,089 | 159,849 | 2.9% |
| 1F | Quest Academy | 3,200,935 | 0 | 0 | 3,200,935 | 3,293,507 | 92,572 | 2.9% |
| 2F | Rockwell Charter | 2,859,590 | 0 | 0 | 2,859,590 | 2,942,290 | 82,700 | 2.9% |
| 3F | Venture Academy | 2,466,081 | 0 | 0 | 2,466,081 | 2,537,401 | 71,320 | 2.9% |
| 4F | SL Center for Scie | 1,483,450 | 0 | 0 | 1,483,450 | 1,526,352 | 42,902 | 2.9% |
| 5F | Utah Virtual Acad | 8,382,129 | 0 | 0 | 8,382,129 | 8,624,542 | 242,413 | 2.9% |
| 6F | Early Light Acade | 2,572,767 | 0 | 0 | 2,572,767 | 2,647,172 | 74,405 | 2.9% |
| 7F | Excelsior Academ | 2,121,500 | 0 | 0 | 2,121,500 | 2,182,854 | 61,354 | 2.9% |
| 8F | Hawthorn Academ | 2,688,579 | 0 | 0 | 2,688,579 | 2,766,333 | 77,754 | 2.9% |
| 9F | Mountain Heights | 1,529,065 | 0 | 0 | 1,529,065 | 1,573,286 | 44,221 | 2.9% |
| 1G | Jefferson Academ | 2,501,232 | 0 | 0 | 2,501,232 | 2,573,568 | 72,336 | 2.9% |
| 2G | Vista at Entrada | 2,786,683 | 0 | 0 | 2,786,683 | 2,867,274 | 80,591 | 2.9% |
| 3G | Bear River Charte | 633,142 | 0 | 0 | 633,142 | 651,453 | 18,311 | 2.9% |
| 4G | Maria Montessori | 1,700,921 | 0 | 0 | 1,700,921 | 1,750,112 | 49,191 | 2.9% |
| 5G | Canyon Grove Ac | 1,435,813 | 0 | 0 | 1,435,813 | 1,477,337 | 41,524 | 2.9% |
| 6G | Weilenmann Scho | 1,872,397 | 0 | 0 | 1,872,397 | 1,926,547 | 54,150 | 2.9% |
| 7G | Summit Academy | 2,402,134 | 0 | 0 | 2,402,134 | 2,471,604 | 69,470 | 2.9% |
| 8G | Good Foundations | 1,446,703 | 0 | 0 | 1,446,703 | 1,488,542 | 41,839 | 2.9% |
| 9G | Alianza Academy | 1,534,950 | 0 | 0 | 1,534,950 | 1,579,341 | 44,391 | 2.9% |
| 2H | Utah Connections | 2,472,249 | 0 | 0 | 2,472,249 | 2,543,747 | 71,498 | 2.9% |
| 3H | Endeavor Hall | 1,960,646 | 0 | 0 | 1,960,646 | 2,017,348 | 56,702 | 2.9% |
| 4H | Aristotle Academy | 777,269 | 0 | 0 | 777,269 | 799,748 | 22,479 | 2.9% |
| 5H | High Mark Charte | 2,209,683 | 0 | 0 | 2,209,683 | 2,273,587 | 63,904 | 2.9% |
| 6H | Promontory Scho | 1,480,702 | 0 | 0 | 1,480,702 | 1,523,524 | 42,822 | 2.9% |
| 7H | Pacific Heritage A | 1,285,195 | 0 | 0 | 1,285,195 | 1,322,363 | 37,168 | 2.9% |
| 8H | Valley Arts Acade | 1,320,413 | 0 | 0 | 1,320,413 | 1,358,600 | 38,187 | 2.9% |
| 9H | Pioneer High Sch | 1,846,431 | 0 | 0 | 1,846,431 | 1,899,830 | 53,399 | 2.9% |
| 1I | Utah International | 448,921 | 0 | 0 | 448,921 | 461,904 | 12,983 | 2.9% |
| 3I | Leadership Learni | 1,412,484 | 0 | 0 | 1,412,484 | 1,453,333 | 40,849 | 2.9% |
| 4I | Mana Academy C | 2,093,541 | 0 | 0 | 2,093,541 | 2,154,087 | 60,546 | 2.9% |
| 5I | Voyage Academy | 1,527,619 | 0 | 0 | 1,527,619 | 1,571,798 | 44,179 | 2.9% |
| 7I | WSU Charter Aca | 97,764 | 0 | 0 | 97,764 | 100,591 | 2,827 | 2.9% |
| 9I | Utah Career Path | 715,144 | 0 | 0 | 715,144 | 735,826 | 20,682 | 2.9% |

## FY14 Current Basic Programs and Transportation Funds Scenario

| | |
|---|---|
| WPU Value Increase | 2.87% |
| | |
| FY14 WPU Value-Basic Programs | $2,899 |
| FY14 WPU Value-Add-on Programs | $2,659 |
| | |
| FY14 WPU Value-Basic Programs Scenario | $2,982 |
| FY14 WPU Value-Add-on Programs Scenario | $2,735 |

**FY14 Scenarios, Statewide**

| | Current | Scenario |
|---|---|---|
| **Scenario I**<br>Formula Change:<br>CY October 1 K12 for Districts<br>Local Replacement District Contribution<br>Elimination of:<br>Administrative Costs (All LEAs)<br>Class Size Reduction<br>Transportation<br>WPU Flex<br>Increase in WPU Value | $2,176,727,785 | $2,176,727,785 |
| **Scenario II**<br>Formula Change:<br>CY October 1 K12 for Districts<br>Local Replacement District Contribution<br>Elimination of:<br>Transportation<br>Increase in WPU Value | $2,055,837,285 | $2,055,837,285 |
| **Scenario III**<br>Formula Change:<br>CY October 1 K12 for Districts<br>Elimination of:<br>WPU Flex<br>Dollar Reduction:<br>Class Size Reduction | $2,019,209,350 | $2,019,209,350 |
| **Scenario IV**<br>Formula Change:<br>CY October 1 K12 for Districts<br>Local Replacement District Contribution<br>Administrative Costs (All LEAs)<br>Revenue Change:<br>Freeze Basic Levy | $1,999,327,185 | $2,023,568,223 |

## FY14 Current-Scenarios Differences, by Local Education Agency

| ID | LEA | Scenario I | Scenario II | Scenario III | Scenario IV |
|---|---|---|---|---|---|
| | Charters | $ (1,773,465) | $ 3,783,770 | $ (5,607,135) | $ 3,474,822 |
| | Districts | $ 1,773,465 | $ (3,783,770) | $ 5,607,135 | $ 20,766,217 |
| | Statewide | $ - | $ - | $ - | $ 24,241,039 |
| 1 | Alpine | $1,223,747 | $1,525,882 | $218,719 | $4,225,402 |
| 2 | Beaver | (113,307) | (38,628) | (156,200) | 9,341 |
| 3 | Box Elder | (902,958) | (1,246,906) | 175,861 | 662,569 |
| 4 | Cache | (992,140) | (1,103,797) | 221,380 | 1,301,452 |
| 5 | Carbon | (1,031,088) | (1,036,645) | (43,828) | (402,007) |
| 6 | Daggett | (286,488) | (67,003) | (8,194) | (214,630) |
| 7 | Davis | 3,309,571 | 3,173,789 | 1,232,177 | 4,201,328 |
| 8 | Duchesne | 566,575 | 208,898 | 323,223 | 728,404 |
| 9 | Emery | (164,231) | (217,718) | 3,449 | 247,373 |
| 10 | Garfield | (88,562) | (69,572) | (70,776) | (44,065) |
| 11 | Grand | (126,702) | (40,781) | 40,361 | 50,291 |
| 12 | Granite | 6,755,277 | 6,613,072 | 3,157,325 | 5,929,486 |
| 13 | Iron | (138,770) | (399,125) | (121,998) | 280,446 |
| 14 | Jordan | (2,450,634) | (2,479,930) | 114,798 | (853,802) |
| 15 | Juab | (31,875) | 78,155 | (5,462) | 349,771 |
| 16 | Kane | (87,801) | (107,457) | (68,442) | 12,310 |
| 17 | Millard | (194,535) | (267,554) | (178,520) | 199,335 |
| 18 | Morgan | (275,510) | (171,666) | (75,424) | 250,055 |
| 19 | Nebo | 1,657,652 | 1,170,284 | 543,293 | 2,232,659 |
| 20 | North Sanpete | (106,091) | 58,545 | 179,904 | 591,570 |
| 21 | North Summit | (365,828) | (235,179) | (93,526) | (134,447) |
| 22 | Park City | (2,342,442) | (2,352,886) | (101,446) | (1,619,083) |
| 23 | Piute | (380,382) | (157,117) | (37,508) | (228,393) |
| 24 | Rich | (284,016) | (94,560) | (22,031) | (149,117) |
| 25 | San Juan | (1,307,379) | (1,331,592) | (246,342) | 230,362 |
| 26 | Sevier | (131,983) | (156,180) | (282,799) | 496,339 |
| 27 | South Sanpete | 55,617 | 147,076 | 18,680 | 503,931 |
| 28 | South Summit | (497,436) | (366,687) | (145,994) | (230,776) |
| 29 | Tintic | (300,005) | (40,138) | (40,125) | (254,055) |
| 30 | Tooele | 1,193,521 | 732,163 | 469,918 | 1,601,415 |
| 31 | Uintah | (45,050) | (250,251) | 120,730 | 625,421 |
| 32 | Wasatch | (690,407) | (922,165) | (244,716) | (511,360) |
| 33 | Washington | (1,280,967) | (2,375,876) | (1,163,430) | (906,161) |
| 34 | Wayne | (278,123) | (135,297) | (67,073) | (163,045) |
| 35 | Weber | 775,084 | 11,889 | (15,020) | 1,613,443 |
| 36 | Salt Lake | (62,863) | (1,099,003) | 1,531,006 | (145,070) |
| 37 | Ogden | 749,082 | 681,409 | 381,169 | 566,907 |
| 38 | Provo | 2,519,233 | 2,313,658 | 1,615,386 | 2,184,236 |
| 39 | Logan | (709,728) | (895,854) | (364,888) | (673,656) |
| 40 | Murray | 860,101 | 604,150 | (60,215) | 391,580 |
| 42 | Canyons | (2,224,694) | (3,443,173) | (1,126,287) | (2,189,542) |

## FY14 Current-Scenarios Differences, by Local Education Agency

| ID | LEA | Scenario I | Scenario II | Scenario III | Scenario IV |
|---|---|---|---|---|---|
| 68 | Ogden Preparatory Academy | $ (73,982) | $ 70,024 | $ (115,208) | $ 40,475 |
| 74 | American Preparatory Academy | (209,852) | 223,633 | (357,745) | (4,368) |
| 81 | Walden School | (8,394) | 36,553 | (54,108) | 43,667 |
| 82 | Freedom Academy | (76,608) | 59,884 | (100,680) | 56,163 |
| 83 | AMES | 114,318 | 38,944 | (20,345) | 48,261 |
| 86 | Pinnacle Canyon Academy | 50,051 | 45,590 | (50,393) | 30,434 |
| 87 | City Academy | 47,353 | 20,517 | (15,192) | 34,890 |
| 89 | Soldier Hollow School | (30,053) | 19,044 | (33,947) | 43,940 |
| 90 | Tuacahn Performing Arts | 87,227 | 29,852 | (15,637) | 37,432 |
| 92 | Uintah River High School | 20,732 | 6,736 | (3,532) | 10,991 |
| 93 | John Hancock | (17,214) | 12,418 | (21,605) | 27,567 |
| 94 | Thomas Edison | (123,762) | 85,206 | (148,899) | 51,140 |
| 95 | Timpanogos Academy | (52,160) | 26,140 | (48,875) | 43,226 |
| 97 | Salt Lake Arts Academy | (41,830) | 25,553 | (46,131) | 38,556 |
| 98 | Fast Forward High School | 58,871 | 19,690 | (10,361) | 35,255 |
| A1 | NUAMES | 119,592 | 41,598 | (21,825) | 32,028 |
| A2 | Ranches Academy | (41,188) | 23,160 | (42,340) | 36,114 |
| A3 | DaVinci Academy | (5,924) | 76,760 | (105,214) | 42,448 |
| A4 | Summit Academy | (118,793) | 62,499 | (116,564) | 58,768 |
| A5 | Itineris Early College High | 65,106 | 22,590 | (11,772) | 44,054 |
| A6 | North Davis Prep Academy | (99,428) | 63,310 | (111,850) | 39,193 |
| A7 | Moab Community School | (14,745) | 7,038 | (13,343) | 17,325 |
| A8 | East Hollywood High School | 71,596 | 24,391 | (12,789) | 30,332 |
| A9 | SUCCESS Academy | 80,303 | 28,043 | (14,637) | 36,849 |
| 1B | UCAS | 95,671 | 32,381 | (16,884) | 39,517 |
| 2B | Lincoln Academy | (44,735) | 45,848 | (74,314) | 40,224 |
| 3B | Beehive Science & Technology | 9,133 | 20,640 | (25,133) | 43,661 |
| 4B | Wasatch Peak Academy | (53,815) | 24,921 | (47,821) | 41,181 |
| 5B | North Star Academy | (44,416) | 33,773 | (57,431) | 31,012 |
| 7B | Reagan Academy | (74,452) | 43,187 | (78,740) | 39,701 |
| 8B | American Leadership Academy | 16,443 | 119,981 | (157,860) | 65,040 |
| 9B | Navigator Pointe Academy | (48,571) | 33,488 | (58,463) | 30,494 |
| 1C | Odyssey Charter School | (62,228) | 32,073 | (59,484) | 31,595 |
| 2C | Intech Collegiate High School | 52,352 | 16,831 | (8,885) | 26,839 |
| 3C | Entheos Academy | (93,345) | 65,238 | (112,783) | 40,205 |
| 4C | Lakeview Academy | (95,215) | 57,021 | (101,847) | 54,782 |
| 5C | Legacy Preparatory Academy | (85,784) | 70,039 | (117,850) | 41,652 |
| 6C | Liberty Academy | (27,319) | 26,823 | (44,292) | 37,877 |
| 7C | Monticello Academy | (63,379) | 47,853 | (81,330) | 44,269 |
| 8C | Mountainville Academy | (74,522) | 47,092 | (83,418) | 44,153 |
| 9C | Paradigm High School | 91,070 | 47,523 | (38,036) | 37,568 |
| 1D | Renaissance Academy | (80,771) | 42,413 | (78,126) | 42,013 |
| 2D | Channing Hall | (80,154) | 40,879 | (76,820) | 38,756 |
| 3D | Spectrum Academy | 172,611 | 76,522 | (68,321) | 31,897 |
| 4D | Syracuse Arts Academy | (78,121) | 68,550 | (114,366) | 39,866 |
| 5D | George Washington Academy | (116,091) | 63,707 | (117,115) | 39,855 |
| 6D | Noah Webster Academy | (71,364) | 34,263 | (66,148) | 31,535 |

## FY14 Current-Scenarios Differences, by Local Education Agency

| ID | LEA | Scenario I | Scenario II | Scenario III | Scenario IV |
|---|---|---|---|---|---|
| 7D | Salt Lake SPA | $ 64,793 | $ 22,396 | $ (11,684) | $ 43,307 |
| 8D | Open Classroom | (34,119) | 25,713 | (44,162) | 38,144 |
| 9D | Canyon Rim Academy | (65,294) | 32,235 | (60,879) | 31,145 |
| 1E | Guadalupe Schools | (15,997) | 7,817 | (14,510) | 20,172 |
| 2E | Karl G. Maeser Prep Academy | 69,044 | 45,163 | (41,254) | 36,104 |
| 3E | C.S. Lewis Academy | (49,830) | 27,766 | (50,787) | 44,402 |
| 4E | Dual Immersion Academy | (54,639) | 25,990 | (49,380) | 43,240 |
| 5E | Edith Bowen Lab School | (32,179) | 19,819 | (35,588) | 30,130 |
| 7E | Gateway Preparatory | (70,745) | 42,058 | (76,901) | 37,138 |
| 8E | Merit College Prep Academy | 122,705 | 46,172 | (37,583) | 37,699 |
| 9E | Providence Hall | (82,050) | 106,717 | (168,108) | 59,735 |
| 1F | Quest Academy | (85,229) | 61,902 | (106,887) | 56,010 |
| 2F | Rockwell Charter High School | 93,724 | 55,222 | (53,948) | 31,082 |
| 3F | Venture Academy | (3,496) | 47,501 | (63,831) | 42,443 |
| 4F | SL Center for Science Ed. | 29,345 | 28,625 | (30,717) | 37,251 |
| 5F | Utah Virtual Academy | 85,055 | 162,301 | (204,574) | 75,693 |
| 6F | Early Light Academy | (57,665) | 49,738 | (83,022) | 44,262 |
| 7F | Excelsior Academy | (83,447) | 40,947 | (77,232) | 40,204 |
| 8F | Hawthorn Academy | (72,050) | 51,932 | (89,471) | 47,717 |
| 9F | Mountain Heights Academy | 61,511 | 29,405 | (22,320) | 38,234 |
| 1G | Jefferson Academy | (79,596) | 48,331 | (86,822) | 44,859 |
| 2G | Vista at Entrada | (82,678) | 53,895 | (96,513) | 47,031 |
| 3G | Bear River Charter School | (16,393) | 12,250 | (21,276) | 26,797 |
| 4G | Maria Montessori Academy | (59,298) | 32,849 | (59,769) | 32,039 |
| 5G | Canyon Grove Academy | (57,767) | 27,762 | (53,037) | 44,724 |
| 6G | Weilenmann School of Discovery | (64,992) | 36,185 | (66,279) | 34,161 |
| 7G | Summit Academy High School | 143,974 | 46,095 | (24,254) | 48,753 |
| 8G | Good Foundations Academy | (54,666) | 27,955 | (51,947) | 46,303 |
| 9G | Alianza Academy | (54,149) | 29,665 | (55,181) | 45,177 |
| 2H | Utah Connections Academy | 14,036 | 47,637 | (59,907) | 40,355 |
| 3H | Endeavor Hall | (68,865) | 37,855 | (69,471) | 36,136 |
| 4H | Aristotle Academy | (21,180) | 15,056 | (26,454) | 32,770 |
| 5H | High Mark Charter School | (51,441) | 42,595 | (70,841) | 39,757 |
| 6H | Promontory School of EL | (55,588) | 28,587 | (53,506) | 45,866 |
| 7H | Pacific Heritage Academy | (39,869) | 24,799 | (44,104) | 39,225 |
| 8H | Valley Arts Academy | (52,362) | 25,675 | (48,424) | 41,607 |
| 9H | Pioneer High School | 101,074 | 35,382 | (18,608) | 46,969 |
| 1I | Utah International School | 10,428 | 8,679 | (9,191) | 15,450 |
| 3I | Leadership Learning Academy | (57,352) | 27,313 | (52,144) | 44,534 |
| 4I | Mana Academy Charter School | (55,830) | 40,405 | (68,970) | 38,231 |
| 5I | Voyage Academy | (67,150) | 29,493 | (57,500) | 29,451 |
| 7I | WSU Charter Academy | (7,712) | 1,905 | (4,439) | 6,133 |
| 9I | Utah Career Path High School | 40,260 | 13,764 | (7,201) | 25,950 |

**FY14 Scenario--Delete all Programs Except SPED and School LAND Trust: Distribute per Pupil**

| ID | LEA | Enrollment | per Pupil Funds | SPED | School LAND | Total | Percent |
|---|---|---|---|---|---|---|---|
| | Charters | 54,900 | ($29,551,877) | $0 | $0 | ($29,551,877) | -9.3% |
| | Districts | 557,651 | $29,551,877 | $0 | $0 | $29,551,877 | 1.0% |
| | Statewide | 612,551 | $0 | $0 | $0 | $0 | 0.0% |
| 1 | Alpine | 72,419 | $15,116,894 | $0 | $0 | $15,116,894 | 4.1% |
| 2 | Beaver | 1,579 | (2,320,150) | 0 | 0 | (2,320,150) | -21.5% |
| 3 | Box Elder | 11,131 | 3,262,720 | 0 | 0 | 3,262,720 | 5.8% |
| 4 | Cache | 16,038 | 1,528,341 | 0 | 0 | 1,528,341 | 1.8% |
| 5 | Carbon | 3,369 | (1,687,163) | 0 | 0 | (1,687,163) | -8.2% |
| 6 | Daggett | 194 | (1,461,621) | 0 | 0 | (1,461,621) | -56.6% |
| 7 | Davis | 68,573 | 17,790,792 | 0 | 0 | 17,790,792 | 5.2% |
| 8 | Duchesne | 5,021 | (1,705,843) | 0 | 0 | (1,705,843) | -5.9% |
| 9 | Emery | 2,310 | (4,654,412) | 0 | 0 | (4,654,412) | -26.7% |
| 10 | Garfield | 930 | (3,207,522) | 0 | 0 | (3,207,522) | -38.7% |
| 11 | Grand | 1,455 | (400,088) | 0 | 0 | (400,088) | -4.8% |
| 12 | Granite | 68,106 | 14,209,975 | 0 | 0 | 14,209,975 | 4.1% |
| 13 | Iron | 8,685 | 1,275,589 | 0 | 0 | 1,275,589 | 2.8% |
| 14 | Jordan | 52,855 | 15,047,386 | 0 | 0 | 15,047,386 | 5.7% |
| 15 | Juab | 2,287 | 1,310,846 | 0 | 0 | 1,310,846 | 12.0% |
| 16 | Kane | 1,212 | (2,841,789) | 0 | 0 | (2,841,789) | -29.8% |
| 17 | Millard | 2,841 | (3,027,630) | 0 | 0 | (3,027,630) | -16.3% |
| 18 | Morgan | 2,632 | 1,731,067 | 0 | 0 | 1,731,067 | 14.6% |
| 19 | Nebo | 31,230 | 3,573,985 | 0 | 0 | 3,573,985 | 2.2% |
| 20 | North Sanpete | 2,408 | (1,173,027) | 0 | 0 | (1,173,027) | -8.3% |
| 21 | North Summit | 990 | (1,482,132) | 0 | 0 | (1,482,132) | -21.8% |
| 22 | Park City | 4,630 | (19,695,556) | 0 | 0 | (19,695,556) | -45.3% |
| 23 | Piute | 304 | (1,972,982) | 0 | 0 | (1,972,982) | -53.4% |
| 24 | Rich | 479 | (3,096,804) | 0 | 0 | (3,096,804) | -54.1% |
| 25 | San Juan | 3,020 | (6,655,029) | 0 | 0 | (6,655,029) | -29.5% |
| 26 | Sevier | 4,585 | (836,158) | 0 | 0 | (836,158) | -3.3% |
| 27 | South Sanpete | 3,162 | (3,182,174) | 0 | 0 | (3,182,174) | -15.5% |
| 28 | South Summit | 1,495 | (1,448,395) | 0 | 0 | (1,448,395) | -15.6% |
| 29 | Tintic | 250 | (2,232,260) | 0 | 0 | (2,232,260) | -61.4% |
| 30 | Tooele | 14,107 | 5,013,685 | 0 | 0 | 5,013,685 | 7.2% |
| 31 | Uintah | 7,591 | 4,094,481 | 0 | 0 | 4,094,481 | 11.2% |
| 32 | Wasatch | 5,786 | (3,484,715) | 0 | 0 | (3,484,715) | -10.2% |
| 33 | Washington | 27,099 | 4,563,292 | 0 | 0 | 4,563,292 | 3.3% |
| 34 | Wayne | 501 | (1,928,548) | 0 | 0 | (1,928,548) | -41.1% |
| 35 | Weber | 31,028 | 8,858,643 | 0 | 0 | 8,858,643 | 5.6% |
| 36 | Salt Lake | 23,965 | (6,233,147) | 0 | 0 | (6,233,147) | -4.6% |
| 37 | Ogden | 12,489 | 2,269,943 | 0 | 0 | 2,269,943 | 3.5% |
| 38 | Provo | 14,799 | 4,761,510 | 0 | 0 | 4,761,510 | 6.4% |
| 39 | Logan | 5,987 | 2,054,141 | 0 | 0 | 2,054,141 | 6.9% |
| 40 | Murray | 6,435 | (317,491) | 0 | 0 | (317,491) | -0.9% |
| 42 | Canyons | 33,674 | (1,866,777) | 0 | 0 | (1,866,777) | -1.0% |

**FY14 Scenario--Delete all Programs Except SPED and School LAND Trust: Distribute per Pupil**

***Charter 2***

| ID | LEA | Enrollment | per Pupil Funds | SPED | School LAND | Total | Percent |
|---|---|---|---|---|---|---|---|
| | Charters | 54,900 | ($29,551,877) | $0 | $0 | ($29,551,877) | -9.3% |
| | Districts | 557,651 | $29,551,877 | $0 | $0 | $29,551,877 | 1.0% |
| | Statewide | 612,551 | $0 | $0 | $0 | $0 | 0.0% |
| 68 | Ogden Preparatory Academy | 1,041 | ($456,175) | $0 | $0 | ($456,175) | -7.7% |
| 74 | American Preparatory Academ | 3,430 | (1,359,962) | 0 | 0 | (1,359,962) | -7.1% |
| 81 | Walden School | 443 | (561,863) | 0 | 0 | (561,863) | -19.0% |
| 82 | Freedom Academy | 955 | (385,240) | 0 | 0 | (385,240) | -7.3% |
| 83 | AMES | 491 | (727,957) | 0 | 0 | (727,957) | -22.9% |
| 86 | Pinnacle Canyon Academy | 517 | (450,755) | 0 | 0 | (450,755) | -12.4% |
| 87 | City Academy | 235 | (304,996) | 0 | 0 | (304,996) | -18.7% |
| 89 | Soldier Hollow School | 295 | (102,632) | 0 | 0 | (102,632) | -6.2% |
| 90 | Tuacahn Performing Arts | 381 | (431,620) | 0 | 0 | (431,620) | -18.1% |
| 92 | Uintah River High School | 74 | (146,003) | 0 | 0 | (146,003) | -25.9% |
| 93 | John Hancock | 185 | (96,351) | 0 | 0 | (96,351) | -8.9% |
| 94 | Thomas Edison | 1,315 | (424,499) | 0 | 0 | (424,499) | -5.8% |
| 95 | Timpanogos Academy | 437 | (121,564) | 0 | 0 | (121,564) | -5.3% |
| 97 | Salt Lake Arts Academy | 390 | (204,726) | 0 | 0 | (204,726) | -9.5% |
| 98 | Fast Forward High School | 238 | (312,910) | 0 | 0 | (312,910) | -19.8% |
| A1 | NUAMES | 548 | (687,473) | 0 | 0 | (687,473) | -20.4% |
| A2 | Ranches Academy | 364 | (78,176) | 0 | 0 | (78,176) | -3.9% |
| A3 | DaVinci Academy | 1,097 | (495,826) | 0 | 0 | (495,826) | -7.8% |
| A4 | Summit Academy | 998 | (397,388) | 0 | 0 | (397,388) | -7.2% |
| A5 | Itineris Early College High Sch | 297 | (532,916) | 0 | 0 | (532,916) | -26.9% |
| A6 | North Davis Preparatory Acad | 1,008 | (418,186) | 0 | 0 | (418,186) | -7.6% |
| A7 | Moab Community School | 116 | (79,068) | 0 | 0 | (79,068) | -11.6% |
| A8 | East Hollywood High School | 309 | (335,268) | 0 | 0 | (335,268) | -17.1% |
| A9 | SUCCESS Academy | 375 | (643,071) | 0 | 0 | (643,071) | -26.0% |
| 1B | UCAS | 402 | (649,656) | 0 | 0 | (649,656) | -24.7% |
| 2B | Lincoln Academy | 684 | (287,699) | 0 | 0 | (287,699) | -7.4% |
| 3B | Beehive Science & Technolog | 294 | (224,848) | 0 | 0 | (224,848) | -13.0% |
| 4B | Wasatch Peak Academy | 416 | (96,406) | 0 | 0 | (96,406) | -4.4% |
| 5B | North Star Academy | 527 | (243,342) | 0 | 0 | (243,342) | -8.3% |
| 7B | Reagan Academy | 674 | (269,262) | 0 | 0 | (269,262) | -7.1% |
| 8B | American Leadership Academ | 1,681 | (1,165,269) | 0 | 0 | (1,165,269) | -11.6% |
| 9B | Navigator Pointe Academy | 518 | (180,308) | 0 | 0 | (180,308) | -6.2% |
| 1C | Odyssey Charter School | 536 | (79,728) | 0 | 0 | (79,728) | -2.8% |
| 2C | Intech Collegiate High School | 181 | (362,155) | 0 | 0 | (362,155) | -28.1% |
| 3C | Entheos Academy | 1,036 | (358,233) | 0 | 0 | (358,233) | -6.3% |
| 4C | Lakeview Academy | 931 | (275,938) | 0 | 0 | (275,938) | -5.5% |
| 5C | Legacy Preparatory Academy | 1,073 | (412,788) | 0 | 0 | (412,788) | -6.8% |
| 6C | Liberty Academy | 383 | (236,500) | 0 | 0 | (236,500) | -10.2% |
| 7C | Monticello Academy | 752 | (301,544) | 0 | 0 | (301,544) | -7.2% |
| 8C | Mountainville Academy | 750 | (232,390) | 0 | 0 | (232,390) | -5.7% |
| 9C | Paradigm High School | 644 | (598,026) | 0 | 0 | (598,026) | -15.3% |
| 1D | Renaissance Academy | 714 | (166,418) | 0 | 0 | (166,418) | -4.4% |
| 2D | Channing Hall | 658 | (223,391) | 0 | 0 | (223,391) | -6.2% |
| 3D | Spectrum Academy | 542 | (433,126) | 0 | 0 | (433,126) | -8.2% |
| 4D | Syracuse Arts Academy | 1,026 | (432,904) | 0 | 0 | (432,904) | -7.4% |
| 5D | George Washington Academy | 1,024 | (231,467) | 0 | 0 | (231,467) | -4.2% |
| 6D | Noah Webster Academy | 536 | (172,964) | 0 | 0 | (172,964) | -5.8% |

**FY14 Scenario--Delete all Programs Except SPED and School LAND Trust: Distribute per Pupil**

***Charter 2***

| ID | LEA | Enrollment | per Pupil Funds | SPED | School LAND | Total | Percent |
|---|---|---|---|---|---|---|---|
| 7D | Salt Lake SPA | 292 | ($299,367) | $0 | $0 | ($299,367) | -17.0% |
| 8D | Open Classroom | 385 | (200,024) | 0 | 0 | (200,024) | -9.1% |
| 9D | Canyon Rim Academy | 528 | (119,510) | 0 | 0 | (119,510) | -4.2% |
| 1E | Guadalupe Schools | 135 | (193,247) | 0 | 0 | (193,247) | -21.9% |
| 2E | Karl G. Maeser Prep Academy | 619 | (590,786) | 0 | 0 | (590,786) | -15.7% |
| 3E | C.S. Lewis Academy | 449 | (54,630) | 0 | 0 | (54,630) | -2.3% |
| 4E | Dual Immersion Academy | 437 | (155,723) | 0 | 0 | (155,723) | -6.5% |
| 5E | Edith Bowen Lab School | 304 | (182,867) | 0 | 0 | (182,867) | -10.3% |
| 7E | Gateway Preparatory | 631 | (290,306) | 0 | 0 | (290,306) | -8.1% |
| 8E | Merit College Prep Academy | 257 | (1,292,569) | 0 | 0 | (1,292,569) | -42.5% |
| 9E | Providence Hall | 1,543 | (692,625) | 0 | 0 | (692,625) | -7.7% |
| 1F | Quest Academy | 951 | (256,004) | 0 | 0 | (256,004) | -4.8% |
| 2F | Rockwell Charter High School | 535 | (986,953) | 0 | 0 | (986,953) | -24.3% |
| 3F | Venture Academy | 724 | (371,205) | 0 | 0 | (371,205) | -9.1% |
| 4F | SL Center for Science Ed. | 378 | (356,671) | 0 | 0 | (356,671) | -15.3% |
| 5F | Utah Virtual Academy | 1,956 | (1,010,613) | 0 | 0 | (1,010,613) | -8.0% |
| 6F | Early Light Academy | 752 | (313,505) | 0 | 0 | (313,505) | -7.3% |
| 7F | Excelsior Academy | 683 | (168,566) | 0 | 0 | (168,566) | -4.6% |
| 8F | Hawthorn Academy | 811 | (323,455) | 0 | 0 | (323,455) | -7.2% |
| 9F | Mountain Heights Academy | 389 | (390,954) | 0 | 0 | (390,954) | -16.2% |
| 1G | Jefferson Academy | 762 | (185,803) | 0 | 0 | (185,803) | -4.4% |
| 2G | Vista at Entrada | 799 | (282,694) | 0 | 0 | (282,694) | -6.2% |
| 3G | Bear River Charter School | 180 | (135,451) | 0 | 0 | (135,451) | -12.3% |
| 4G | Maria Montessori Academy | 544 | (76,940) | 0 | 0 | (76,940) | -2.7% |
| 5G | Canyon Grove Academy | 452 | (53,584) | 0 | 0 | (53,584) | -2.2% |
| 6G | Weilenmann School of Discover | 580 | (221,118) | 0 | 0 | (221,118) | -6.9% |
| 7G | Summit Academy High School | 499 | (826,630) | 0 | 0 | (826,630) | -23.6% |
| 8G | Good Foundations Academy | 468 | (82,242) | 0 | 0 | (82,242) | -3.3% |
| 9G | Alianza Academy | 457 | (148,648) | 0 | 0 | (148,648) | -5.8% |
| 2H | Utah Connections Academy | 689 | (339,363) | 0 | 0 | (339,363) | -8.7% |
| 3H | Endeavor Hall | 614 | (131,609) | 0 | 0 | (131,609) | -4.0% |
| 4H | Aristotle Academy | 220 | (139,234) | 0 | 0 | (139,234) | -10.3% |
| 5H | High Mark Charter School | 677 | (240,025) | 0 | 0 | (240,025) | -6.5% |
| 6H | Promontory School of EL | 464 | (104,300) | 0 | 0 | (104,300) | -4.2% |
| 7H | Pacific Heritage Academy | 397 | (105,605) | 0 | 0 | (105,605) | -4.9% |
| 8H | Valley Arts Academy | 419 | (100,967) | 0 | 0 | (100,967) | -4.4% |
| 9H | Pioneer High School | 479 | (335,546) | 0 | 0 | (335,546) | -12.0% |
| 1I | Utah International School | 104 | (107,109) | 0 | 0 | (107,109) | -15.5% |
| 3I | Leadership Learning Academy | 450 | (34,647) | 0 | 0 | (34,647) | -1.5% |
| 4I | Mana Academy Charter School | 650 | (73,332) | 0 | 0 | (73,332) | -2.2% |
| 5I | Voyage Academy | 500 | (38,378) | 0 | 0 | (38,378) | -1.5% |
| 7I | WSU Charter Academy | 41 | 27,089 | 0 | 0 | 27,089 | 14.6% |
| 9I | Utah Career Path High School | 175 | (177,174) | 0 | 0 | (177,174) | -16.5% |

**Scenario V and Current Comparison by Program**

*Uses average of CY Feb and CY Oct to calculate "growth" and current year, and 100% LRF per Pupil*

| ID | LEA | K-12 | Pro Staff | WPU Flex | Gifted | Board Local | Voted Local | LRF | Total | Percent |
|---|---|---|---|---|---|---|---|---|---|---|
| | **Charters** | $ (1,630,406) | $ (91,939) | $ (42,475) | $ (20,900) | $ - | $ - | $ - | $ (1,785,720) | -0.70% |
| | **Districts** | $ 46,803,637 | $ 4,369,091 | $ 42,475 | $ 20,900 | $ 1,397,304 | $ 5,033,620 | $ (43,517,903) | $ 14,149,124 | 0.80% |
| | **Statewide** | $ 45,173,231 | $ 4,277,152 | $ - | $ - | $ 1,397,304 | $ 5,033,620 | $ (43,517,903) | $ 12,363,404 | 0.61% |
| 1 | Alpine | $6,019,080 | $504,182 | $8,932 | ($9,487) | $227,227 | $908,907 | ($3,723,295) | $3,935,546 | 1.69% |
| 2 | Beaver | (10,697) | ($996) | (1,848) | 1,299 | 0 | 0 | (20,722) | (32,964) | -0.56% |
| 3 | Box Elder | 913,055 | $88,772 | 342 | 1,145 | 34,469 | 51,703 | (650,063) | 439,423 | 1.28% |
| 4 | Cache | 1,430,685 | $131,846 | 2,059 | (1) | 54,010 | 216,042 | (636,907) | 1,197,834 | 2.32% |
| 5 | Carbon | 260,002 | $23,111 | (809) | 1,724 | 0 | 0 | (874,463) | (590,435) | -5.72% |
| 6 | Daggett | 6,703 | $560 | (338) | 1,287 | 0 | 0 | (9,289) | (1,077) | -0.08% |
| 7 | Davis | 6,367,303 | $623,352 | 16,212 | (4,698) | 240,372 | 961,489 | (4,322,518) | 3,881,512 | 1.77% |
| 8 | Duchesne | 656,838 | $57,985 | 2,135 | 3,210 | 0 | 0 | (104,861) | 615,307 | 3.72% |
| 9 | Emery | 212,874 | $20,021 | (322) | 2,679 | 0 | 0 | (156,449) | 78,803 | 0.92% |
| 10 | Garfield | 29,654 | $3,109 | (1,188) | 3,385 | 0 | 0 | (14,426) | 20,734 | 0.38% |
| 11 | Grand | 141,827 | $13,144 | (43) | 1,118 | 0 | 0 | (136,932) | 19,114 | 0.41% |
| 12 | Granite | 6,806,067 | $677,177 | 20,517 | (1,724) | 256,935 | 1,027,743 | (4,502,814) | 4,283,901 | 2.08% |
| 13 | Iron | 571,859 | $56,831 | (1,871) | 1,488 | 21,588 | 43,177 | (511,420) | 181,652 | 0.67% |
| 14 | Jordan | 4,545,406 | $396,537 | 7,666 | (5,322) | 148,331 | 593,327 | (6,588,577) | (902,632) | -0.55% |
| 15 | Juab | 177,578 | $14,618 | (59) | 93 | 6,703 | 6,703 | (31,449) | 174,187 | 2.57% |
| 16 | Kane | 50,543 | $4,712 | (1,187) | 3,220 | 0 | 0 | (35,340) | 21,948 | 0.36% |
| 17 | Millard | 72,017 | $7,354 | (2,497) | 2,172 | 0 | 0 | (28,013) | 51,033 | 0.50% |
| 18 | Morgan | 203,797 | $17,556 | 283 | (398) | 341 | 0 | (16,948) | 204,631 | 2.58% |
| 19 | Nebo | 2,725,938 | $247,149 | 1,972 | 1,380 | 102,907 | 334,447 | (1,600,685) | 1,813,108 | 1.79% |
| 20 | North Sanpete | 224,687 | $20,528 | (77) | 738 | 6,482 | 33,926 | (48,205) | 240,079 | 3.16% |
| 21 | North Summit | (6,193) | ($650) | (1,171) | 1,350 | 0 | 0 | (77,765) | (84,429) | -2.05% |
| 22 | Park City | 262,090 | $30,796 | (436) | (809) | 0 | 0 | (2,240,278) | (1,948,637) | -13.56% |
| 23 | Piute | 4,908 | $419 | (479) | 1,432 | 184 | 152 | (3,250) | 3,366 | 0.17% |
| 24 | Rich | 32,207 | $3,080 | (278) | 1,668 | 0 | 0 | (10,557) | 26,120 | 0.96% |
| 25 | San Juan | 67,559 | $6,458 | (2,428) | 3,530 | 2,551 | 10,202 | (39,090) | 48,782 | 0.36% |
| 26 | Sevier | 124,739 | $13,324 | (3,089) | 1,989 | 4,708 | 7,062 | (31,607) | 117,126 | 0.72% |
| 27 | South Sanpete | 229,497 | $23,641 | (733) | 1,734 | 8,664 | 34,657 | (41,483) | 255,977 | 2.15% |
| 28 | South Summit | 25,943 | $2,535 | (1,179) | 502 | 0 | 0 | (243,769) | (215,968) | -4.34% |
| 29 | Tintic | (14,778) | ($1,241) | (632) | 1,468 | (558) | (2,232) | 0 | (17,973) | -0.82% |
| 30 | Tooele | 1,482,949 | $130,909 | 3,409 | 2,588 | 55,983 | 84,535 | (324,366) | 1,436,007 | 3.17% |
| 31 | Uintah | 669,017 | $54,494 | 924 | 550 | 0 | 0 | (262,765) | 462,220 | 2.04% |
| 32 | Wasatch | 280,400 | $27,282 | (2,078) | (259) | 0 | 0 | (825,734) | (520,389) | -2.96% |
| 33 | Washington | 1,066,162 | $105,460 | (11,256) | (1,120) | 0 | 0 | (2,363,309) | (1,204,063) | -1.45% |
| 34 | Wayne | 0 | ($1) | (780) | 1,662 | 1 | 0 | (4,685) | (3,803) | -0.14% |
| 35 | Weber | 2,320,117 | $221,677 | (3,908) | 2,294 | 87,587 | 245,901 | (1,602,897) | 1,270,771 | 1.29% |
| 36 | Salt Lake | 3,064,663 | $335,495 | 13,178 | 3,667 | 0 | 0 | (4,002,175) | (585,172) | -0.83% |
| 37 | Ogden | 1,039,335 | $91,515 | 1,068 | (313) | 39,236 | 126,044 | (1,137,619) | 159,266 | 0.43% |
| 38 | Provo | 2,584,916 | $214,528 | 15,344 | 2,306 | 97,583 | 349,835 | (990,111) | 2,274,401 | 5.19% |
| 39 | Logan | 154,654 | $15,036 | (3,040) | (744) | 0 | 0 | (890,707) | (724,801) | -4.02% |
| 40 | Murray | 478,538 | $50,926 | 114 | (460) | 0 | 0 | (158,102) | 371,016 | 1.90% |
| 42 | Canyons | 1,531,498 | $135,760 | (9,954) | (5,443) | 0 | 0 | (4,254,258) | (2,602,397) | -2.57% |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 68 | Ogden Preparatory Academ | $ (26,468) | $ (1,953) | $ (795) | $ (269) | $ - | $ (29,485) | -0.62% |
| 74 | American Preparatory Acade | (115,438) | ($4,374) | (2,459) | (1,587) | 0 | (123,858) | -0.80% |
| 81 | Walden School | (82,703) | ($5,129) | (430) | (150) | 0 | (88,412) | -3.86% |
| 82 | Freedom Academy | (57,139) | ($3,130) | (571) | (480) | 0 | (61,320) | -1.43% |
| 83 | AMES | (24,352) | ($2,416) | (358) | (424) | 0 | (27,550) | -1.01% |
| 86 | Pinnacle Canyon Academy | (58,909) | ($3,329) | (754) | 234 | 0 | (62,758) | -2.52% |
| 87 | City Academy | (19,655) | ($1,367) | (274) | (57) | 0 | (21,353) | -1.72% |
| 89 | Soldier Hollow School | (9,421) | ($630) | (224) | (59) | 0 | (10,334) | -0.80% |
| 90 | Tuacahn Performing Arts | (48,703) | ($4,071) | (280) | (345) | 0 | (53,399) | -2.55% |
| 92 | Uintah River High School | (6,957) | ($570) | (100) | 0 | 0 | (7,627) | -1.87% |
| 93 | John Hancock | (2,610) | ($226) | (139) | (26) | 0 | (3,001) | -0.36% |
| 94 | Thomas Edison | (32,411) | ($1,569) | (962) | (376) | 0 | (35,318) | -0.61% |
| 95 | Timpanogos Academy | (14,901) | ($1,036) | (205) | (231) | 0 | (16,373) | -0.84% |
| 97 | Salt Lake Arts Academy | (2,806) | ($235) | (211) | (196) | 0 | (3,448) | -0.19% |
| 98 | Fast Forward High School | (20,872) | ($1,219) | (231) | (184) | 0 | (22,506) | -1.72% |
| A1 | NUAMES | 0 | $0 | (470) | (322) | 0 | (792) | -0.03% |
| A2 | Ranches Academy | 0 | $0 | (256) | 0 | 0 | (256) | -0.02% |
| A3 | DaVinci Academy | (30,557) | ($1,389) | (891) | (432) | 0 | (33,269) | -0.65% |
| A4 | Summit Academy | 5,047 | $284 | (605) | (416) | 0 | 4,310 | 0.10% |
| A5 | Itineris Early College High S | (27,831) | ($3,144) | (155) | (308) | 0 | (31,438) | -1.89% |
| A6 | North Davis Preparatory Aca | (31,686) | ($2,398) | (553) | (483) | 0 | (35,120) | -0.77% |
| A7 | Moab Community School | 2,609 | $193 | (66) | 0 | 0 | 2,736 | 0.55% |
| A8 | East Hollywood High School | (8,616) | ($428) | (260) | (273) | 0 | (9,577) | -0.58% |
| A9 | SUCCESS Academy | (27,830) | ($2,590) | (197) | (414) | 0 | (31,031) | -1.49% |
| 1B | UCAS | (27,831) | ($2,844) | (307) | (331) | 0 | (31,313) | -1.40% |
| 2B | Lincoln Academy | (14,176) | ($790) | (504) | (247) | 0 | (15,717) | -0.50% |
| 3B | Beehive Science & Technok | (18,177) | ($950) | (185) | (224) | 0 | (19,536) | -1.34% |
| 4B | Wasatch Peak Academy | 0 | $0 | (229) | (155) | 0 | (384) | -0.02% |
| 5B | North Star Academy | (2,609) | ($181) | (311) | (249) | 0 | (3,350) | -0.14% |
| 7B | Reagan Academy | 2,609 | $141 | (475) | (202) | 0 | 2,073 | 0.07% |
| 8B | American Leadership Acade | 4,662 | $303 | (1,360) | (667) | 0 | 2,938 | 0.04% |
| 9B | Navigator Pointe Academy | (5,218) | ($259) | (357) | (180) | 0 | (6,014) | -0.26% |
| 1C | Odyssey Charter School | (9,421) | ($555) | (319) | (200) | 0 | (10,495) | -0.46% |
| 2C | Intech Collegiate High Scho | (14,071) | ($1,151) | (265) | (22) | 0 | (15,509) | -1.55% |
| 3C | Entheos Academy | (12,292) | ($607) | (635) | (506) | 0 | (14,040) | -0.30% |
| 4C | Lakeview Academy | (54,676) | ($2,905) | (510) | (486) | 0 | (58,577) | -1.41% |
| 5C | Legacy Preparatory Academ | 125,074 | $5,322 | (765) | (403) | 0 | 129,228 | 2.70% |
| 6C | Liberty Academy | 31,364 | $1,966 | (336) | (48) | 0 | 32,946 | 1.90% |
| 7C | Monticello Academy | (7,073) | ($359) | (436) | (346) | 0 | (8,214) | -0.24% |
| 8C | Mountainville Academy | (31,686) | ($1,683) | (460) | (319) | 0 | (34,148) | -1.03% |
| 9C | Paradigm High School | (6,611) | ($394) | (453) | (552) | 0 | (8,010) | -0.24% |
| 1D | Renaissance Academy | (26,932) | ($1,070) | (379) | (385) | 0 | (28,766) | -0.92% |
| 2D | Channing Hall | 8,100 | $444 | (402) | (263) | 0 | 7,879 | 0.27% |
| 3D | Spectrum Academy | (15,046) | ($780) | (2,334) | 1,820 | 0 | (16,340) | -0.62% |
| 4D | Syracuse Arts Academy | (37,745) | ($2,302) | (813) | (262) | 0 | (41,122) | -0.89% |
| 5D | George Washington Acaden | (22,729) | ($1,273) | (654) | (359) | 0 | (25,015) | -0.56% |
| 6D | Noah Webster Academy | 8,828 | $308 | (355) | (220) | 0 | 8,561 | 0.36% |

*Highlighted schools waived G&T funds.

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 7D | Salt Lake SPA | $ (31,310) | $ (3,300) | $ (168) | $ (294) | $ - | $ (35,072) | -2.15% |
| 8D | Open Classroom | (2,609) | ($262) | (254) | (65) | 0 | (3,190) | -0.18% |
| 9D | Canyon Rim Academy | 434 | $31 | (320) | (169) | 0 | (24) | 0.00% |
| 1E | Guadalupe Schools | 0 | $0 | (68) | 0 | 0 | (68) | -0.01% |
| 2E | Karl G. Maeser Prep Acaden | (32,961) | ($1,627) | (424) | (547) | 0 | (35,559) | -1.11% |
| 3E | C.S. Lewis Academy | (19,858) | ($752) | (315) | (143) | 0 | (21,068) | -1.09% |
| 4E | Dual Immersion Academy | (17,510) | ($912) | (251) | (171) | 0 | (18,844) | -1.01% |
| 5E | Edith Bowen Lab School | (2,609) | ($285) | (208) | (33) | 0 | (3,135) | -0.23% |
| 7E | Gateway Preparatory | (30,100) | ($1,530) | (445) | (218) | 0 | (32,293) | -1.13% |
| 8E | Merit College Prep Academy | (33,927) | ($1,551) | (645) | (141) | 0 | (36,264) | -1.57% |
| 9E | Providence Hall | (38,187) | ($1,463) | (1,326) | (506) | 0 | (41,482) | -0.59% |
| 1F | Quest Academy | (59,633) | ($3,245) | (701) | (260) | 0 | (63,839) | -1.52% |
| 2F | Rockwell Charter High Schoc | (26,396) | ($1,020) | (619) | (319) | 0 | (28,354) | -0.87% |
| 3F | Venture Academy | (34,295) | ($1,438) | (420) | (509) | 0 | (36,662) | -1.07% |
| 4F | SL Center for Science Ed. | (475) | ($42) | (291) | (216) | 0 | (1,024) | -0.05% |
| 5F | Utah Virtual Academy | (28,584) | ($1,674) | (2,761) | 447 | 0 | (32,572) | -0.35% |
| 6F | Early Light Academy | (1,594) | ($96) | (552) | (235) | 0 | (2,477) | -0.07% |
| 7F | Excelsior Academy | (20,844) | ($841) | (381) | (336) | 0 | (22,402) | -0.75% |
| 8F | Hawthorn Academy | (7,074) | ($372) | (523) | (345) | 0 | (8,314) | -0.23% |
| 9F | Mountain Heights Academy | (26,613) | ($1,573) | (286) | (338) | 0 | (28,810) | -1.40% |
| 1G | Jefferson Academy | (27,884) | ($1,109) | (532) | (259) | 0 | (29,784) | -0.89% |
| 2G | Vista at Entrada | (16,160) | ($656) | (665) | (168) | 0 | (17,649) | -0.50% |
| 3G | Bear River Charter School | (2,609) | ($77) | (169) | (16) | 0 | (2,871) | -0.37% |
| 4G | Maria Montessori Academy | (25,338) | ($948) | (318) | (236) | 0 | (26,840) | -1.14% |
| 5G | Canyon Grove Academy | (46,738) | ($958) | (320) | (116) | 0 | (48,132) | -2.54% |
| 6G | Wellenmann School of Discc | (22,728) | ($1,263) | (348) | (238) | 0 | (24,577) | -0.96% |
| 7G | Summit Academy High Scho | 0 | $0 | (483) | (597) | 0 | (1,080) | -0.04% |
| 8G | Good Foundations Academy | (24,062) | ($1,319) | (268) | (188) | 0 | (25,837) | -1.28% |
| 9G | Alianza Academy | 7,598 | $355 | (321) | (159) | 0 | 7,473 | 0.37% |
| 2H | Utah Connections Academy | 83,722 | $4,281 | (485) | (431) | 0 | 87,087 | 2.62% |
| 3H | Endeavor Hall | (43,108) | ($1,578) | (400) | (250) | 0 | (45,336) | -1.70% |
| 4H | Aristotle Academy | (3,102) | ($230) | (210) | 0 | 0 | (3,542) | -0.37% |
| 5H | High Mark Charter School | (26,729) | ($976) | (398) | (403) | 0 | (28,506) | -0.93% |
| 6H | Promontory School of EL | (8,089) | ($327) | (279) | (214) | 0 | (8,909) | -0.44% |
| 7H | Pacific Heritage Academy | 0 | $0 | (245) | (194) | 0 | (439) | -0.02% |
| 8H | Valley Arts Academy | (15,879) | ($920) | (260) | 0 | 0 | (17,059) | -0.94% |
| 9H | Pioneer High School | (118,279) | ($2,957) | (334) | (546) | 0 | (122,116) | -4.81% |
| 1I | Utah International School | 0 | $0 | (120) | (16) | 0 | (136) | -0.03% |
| 3I | Leadership Learning Acaden | (19,858) | ($1,115) | (286) | (141) | 0 | (21,400) | -1.11% |
| 4I | Mana Academy Charter Sch | (77,404) | ($4,542) | (351) | (359) | 0 | (82,656) | -2.81% |
| 5I | Voyage Academy | (2,609) | ($90) | (290) | (217) | 0 | (3,206) | -0.15% |
| 7I | WSU Charter Academy | 0 | $0 | (20) | 6 | 0 | (14) | -0.01% |
| 9I | Utah Career Path High Scho | (59,140) | ($5,213) | (125) | (156) | 0 | (64,634) | -6.69% |

*Highlighted schools waived G&T funds.

**Scenario VI and Current Comparison by Program** *Uses average of CY Oct 1 and PY Feb 1 as current year; LRF at 100% per Pupil*

| ID | LEA | K-12 | Pro Staff | WPU Flex | Gifted | Board Local | Voted Local | LRF | Total | Percent |
|---|---|---|---|---|---|---|---|---|---|---|
| | Charters | $(14,029,907) | $ (674,337) | $ (37,291) | $ (20,346) | $ - | $ - | $ - | $ (14,761,881) | -5.8% |
| | Districts | $ 41,097,476 | $ 3,792,484 | $ 37,291 | $ 20,349 | $ 1,394,991 | $ 5,026,435 | $ (43,517,903) | $ 7,851,123 | 0.4% |
| | Statewide | $ 27,067,569 | $ 3,118,147 | $ - | $ 3 | $ 1,394,991 | $ 5,026,435 | $ (43,517,903) | $ (6,910,758) | -0.3% |
| 1 | Alpine | $6,019,080 | $504,182 | $16,031 | ($8,713) | $227,227 | $908,907 | ($3,723,295) | $3,943,419 | 1.70% |
| 2 | Beaver | (98,827) | ($9,193) | (2,604) | 1,217 | 0 | 0 | (20,722) | (130,129) | -2.20% |
| 3 | Box Elder | 913,055 | $88,772 | 1,493 | 1,271 | 34,469 | 51,703 | (650,063) | 440,700 | 1.28% |
| 4 | Cache | 1,430,685 | $131,946 | 3,684 | 177 | 54,010 | 216,042 | (636,907) | 1,199,637 | 2.33% |
| 5 | Carbon | 260,002 | $23,111 | (427) | 1,765 | 0 | 0 | (874,463) | (590,012) | -5.71% |
| 6 | Daggett | (35,214) | ($2,946) | (735) | 1,244 | 0 | 0 | (9,289) | (46,940) | -3.36% |
| 7 | Davis | 6,367,303 | $623,352 | 23,023 | (3,955) | 240,372 | 961,489 | (4,322,518) | 3,889,066 | 1.77% |
| 8 | Duchesne | 656,838 | $57,985 | 2,708 | 3,273 | 0 | 0 | (104,861) | 615,943 | 3.72% |
| 9 | Emery | 212,874 | $20,021 | (23) | 2,712 | 0 | 0 | (156,449) | 79,135 | 0.92% |
| 10 | Garfield | 29,854 | $3,109 | (1,009) | 3,404 | 0 | 0 | (14,426) | 20,932 | 0.38% |
| 11 | Grand | 141,827 | $13,144 | 130 | 1,136 | 0 | 0 | (136,932) | 19,305 | 0.41% |
| 12 | Granite | 6,806,067 | $677,177 | 27,285 | (986) | 256,935 | 1,027,743 | (4,502,814) | 4,291,407 | 2.08% |
| 13 | Iron | 571,859 | $56,831 | (950) | 1,589 | 21,568 | 43,177 | (511,420) | 182,674 | 0.67% |
| 14 | Jordan | 4,545,406 | $396,537 | 12,899 | (4,752) | 148,331 | 593,327 | (6,588,577) | (896,829) | -0.54% |
| 15 | Juab | 177,578 | $14,818 | 175 | 118 | 6,703 | 6,703 | (31,449) | 174,446 | 2.57% |
| 16 | Kane | 50,543 | $4,712 | (983) | 3,242 | 0 | 0 | (35,340) | 22,174 | 0.36% |
| 17 | Millard | 72,017 | $7,354 | (2,150) | 2,210 | 0 | 0 | (28,013) | 51,418 | 0.51% |
| 18 | Morgan | 203,797 | $17,556 | 543 | (369) | 341 | 0 | (16,948) | 204,920 | 2.58% |
| 19 | Nebo | 2,725,938 | $247,149 | 5,158 | 1,727 | 102,907 | 334,447 | (1,600,685) | 1,816,641 | 1.79% |
| 20 | North Sanpete | 224,887 | $20,528 | 181 | 766 | 8,482 | 33,926 | (48,205) | 240,365 | 3.17% |
| 21 | North Summit | (35,363) | ($3,709) | (1,353) | 1,331 | 0 | 0 | (77,765) | (116,859) | -2.84% |
| 22 | Park City | (574,390) | ($67,491) | (9,214) | (1,764) | 0 | 0 | (2,240,278) | (2,893,137) | -20.13% |
| 23 | Piute | 4,908 | $419 | (412) | 1,439 | 184 | 152 | (3,250) | 3,440 | 0.17% |
| 24 | Rich | 32,207 | $3,080 | (187) | 1,677 | 0 | 0 | (10,557) | 26,220 | 0.96% |
| 25 | San Juan | 67,559 | $6,458 | (2,026) | 3,574 | 2,551 | 10,202 | (39,090) | 49,228 | 0.36% |
| 26 | Sevier | 124,739 | $13,324 | (2,565) | 2,047 | 4,708 | 7,062 | (31,607) | 117,708 | 0.73% |
| 27 | South Sanpete | 229,497 | $23,641 | (369) | 1,774 | 8,664 | 34,657 | (41,483) | 256,381 | 2.16% |
| 28 | South Summit | (73,603) | ($7,193) | (2,090) | 403 | 0 | 0 | (243,769) | (326,252) | -6.56% |
| 29 | Tintic | (62,363) | ($5,238) | (1,079) | 1,419 | (2,355) | (9,417) | 0 | (79,033) | -3.61% |
| 30 | Tooele | 1,482,949 | $130,909 | 4,891 | 2,750 | 55,983 | 84,535 | (324,366) | 1,437,651 | 3.17% |
| 31 | Uintah | 669,017 | $54,494 | 1,696 | 635 | 0 | 0 | (262,765) | 463,077 | 2.04% |
| 32 | Wasatch | (552,059) | ($53,712) | (10,516) | (1,178) | 0 | 0 | (825,734) | (1,443,199) | -8.21% |
| 33 | Washington | (2,651,040) | ($262,227) | (48,870) | (5,213) | 0 | 0 | (2,363,309) | (5,330,659) | -6.44% |
| 34 | Wayne | (13,672) | ($1,153) | (832) | 1,656 | (515) | 0 | (4,685) | (19,201) | -0.69% |
| 35 | Weber | 2,320,117 | $221,677 | (696) | 2,644 | 87,587 | 245,901 | (1,602,897) | 1,274,333 | 1.29% |
| 36 | Salt Lake | 3,064,663 | $335,495 | 15,637 | 3,935 | 0 | 0 | (4,002,175) | (582,445) | -0.83% |
| 37 | Ogden | 1,039,335 | $91,515 | 2,309 | (177) | 39,236 | 126,044 | (1,137,619) | 160,643 | 0.43% |
| 38 | Provo | 2,584,916 | $214,528 | 16,853 | 2,471 | 97,583 | 349,835 | (990,111) | 2,276,075 | 5.19% |
| 39 | Logan | 154,654 | $15,036 | (2,444) | (679) | 0 | 0 | (890,707) | (724,140) | -4.01% |
| 40 | Murray | 478,538 | $50,926 | 757 | (390) | 0 | 0 | (158,102) | 371,729 | 1.90% |
| 42 | Canyons | 1,531,498 | $135,760 | (6,628) | (5,081) | 0 | 0 | (4,254,258) | (2,598,709) | -2.57% |

**Scenario VI and Current Comparison by Program** *Uses average of CY Oct 1 and PY Feb 1 as current year; LRF at 100% per Pupil*

| ID | LEA | K-12 | Pro Staff | WPU Flex | Gifted | Board Local | Voted Local | LRF | Total | Percent |
|---|---|---|---|---|---|---|---|---|---|---|
| 68 | Ogden Preparatory Academy | $ (26,468) | $ (1,953) | $ (700) | $ (259) | $ - | $ - | $ - | $ (29,380) | -0.62% |
| 74 | American Preparatory Academy | (3,169,768) | ($120,109) | (2,152) | (1,553) | 0 | 0 | 0 | (3,293,582) | -21.22% |
| 81 | Walden School | (229,801) | ($14,252) | (380) | (144) | 0 | 0 | 0 | (244,577) | -10.68% |
| 82 | Freedom Academy | (592,556) | ($32,454) | (489) | (471) | 0 | 0 | 0 | (625,970) | -14.57% |
| 83 | AMES | (31,309) | ($3,107) | (305) | (418) | 0 | 0 | 0 | (35,139) | -1.29% |
| 86 | Pinnacle Canyon Academy | (58,909) | ($3,329) | (692) | 240 | 0 | 0 | 0 | (62,690) | -2.52% |
| 87 | City Academy | (19,655) | ($1,367) | (246) | (54) | 0 | 0 | 0 | (21,322) | -1.71% |
| 89 | Soldier Hollow School | (9,421) | ($630) | (197) | (56) | 0 | 0 | 0 | (10,304) | -0.80% |
| 90 | Tuacahn Performing Arts | (100,885) | ($8,432) | (239) | (341) | 0 | 0 | 0 | (109,897) | -5.24% |
| 92 | Uintah River High School | (6,957) | ($570) | (91) | 0 | 0 | 0 | 0 | (7,618) | -1.87% |
| 93 | John Hancock | (2,610) | ($226) | (122) | (24) | 0 | 0 | 0 | (2,982) | -0.36% |
| 94 | Thomas Edison | (361,040) | ($17,481) | (845) | (363) | 0 | 0 | 0 | (379,729) | -6.55% |
| 95 | Timpanogos Academy | (14,901) | ($1,036) | (169) | (227) | 0 | 0 | 0 | (16,333) | -0.84% |
| 97 | Salt Lake Arts Academy | (241,799) | ($20,252) | (176) | (192) | 0 | 0 | 0 | (262,419) | -14.36% |
| 98 | Fast Forward High School | (20,872) | ($1,219) | (204) | (181) | 0 | 0 | 0 | (22,476) | -1.72% |
| A1 | NUAMES | 0 | $0 | (413) | (316) | 0 | 0 | 0 | (729) | -0.03% |
| A2 | Ranches Academy | 0 | $0 | (224) | 0 | 0 | 0 | 0 | (224) | -0.01% |
| A3 | DaVinci Academy | (30,557) | ($1,389) | (786) | (420) | 0 | 0 | 0 | (33,152) | -0.65% |
| A4 | Summit Academy | (2,609) | ($146) | (520) | (407) | 0 | 0 | 0 | (3,682) | -0.08% |
| A5 | Itineris Early College High School | (222,644) | ($25,152) | (124) | (304) | 0 | 0 | 0 | (248,224) | -14.91% |
| A6 | North Davis Preparatory Academy | (31,686) | ($2,398) | (466) | (474) | 0 | 0 | 0 | (35,024) | -0.77% |
| A7 | Moab Community School | (27,685) | ($2,054) | (56) | 0 | 0 | 0 | 0 | (29,795) | -5.94% |
| A8 | East Hollywood High School | (24,351) | ($1,209) | (227) | (269) | 0 | 0 | 0 | (26,056) | -1.56% |
| A9 | SUCCESS Academy | (48,703) | ($4,532) | (158) | (410) | 0 | 0 | 0 | (53,803) | -2.59% |
| 1B | UCAS | (52,182) | ($5,332) | (263) | (326) | 0 | 0 | 0 | (58,103) | -2.59% |
| 2B | Lincoln Academy | (143,530) | ($8,003) | (441) | (240) | 0 | 0 | 0 | (152,214) | -4.87% |
| 3B | Beehive Science & Technology | (215,164) | ($11,251) | (157) | (221) | 0 | 0 | 0 | (226,793) | -15.56% |
| 4B | Wasatch Peak Academy | (89,870) | ($6,486) | (195) | (151) | 0 | 0 | 0 | (96,702) | -5.36% |
| 5B | North Star Academy | (59,257) | ($4,123) | (264) | (244) | 0 | 0 | 0 | (63,888) | -2.65% |
| 7B | Reagan Academy | 2,609 | $141 | (416) | (196) | 0 | 0 | 0 | 2,138 | 0.07% |
| 8B | American Leadership Academy | (89,115) | ($5,788) | (1,196) | (649) | 0 | 0 | 0 | (96,748) | -1.20% |
| 9B | Navigator Pointe Academy | (5,218) | ($259) | (312) | (175) | 0 | 0 | 0 | (5,964) | -0.26% |
| 1C | Odyssey Charter School | (9,421) | ($555) | (275) | (195) | 0 | 0 | 0 | (10,446) | -0.45% |
| 2C | Intech Collegiate High School | (90,605) | ($7,413) | (242) | (19) | 0 | 0 | 0 | (98,279) | -9.85% |
| 3C | Entheos Academy | (12,292) | ($607) | (546) | (496) | 0 | 0 | 0 | (13,941) | -0.30% |
| 4C | Lakeview Academy | (326,023) | ($17,323) | (432) | (477) | 0 | 0 | 0 | (344,255) | -8.31% |
| 5C | Legacy Preparatory Academy | (38,760) | ($1,649) | (669) | (393) | 0 | 0 | 0 | (41,471) | -0.86% |
| 6C | Liberty Academy | (12,790) | ($801) | (299) | (44) | 0 | 0 | 0 | (13,934) | -0.80% |
| 7C | Monticello Academy | (7,073) | ($359) | (370) | (339) | 0 | 0 | 0 | (8,141) | -0.24% |
| 8C | Mountainville Academy | (31,686) | ($1,683) | (395) | (312) | 0 | 0 | 0 | (34,076) | -1.02% |
| 9C | Paradigm High School | (334,139) | ($19,923) | (387) | (545) | 0 | 0 | 0 | (354,994) | -10.61% |
| 1D | Renaissance Academy | (151,474) | ($6,021) | (321) | (379) | 0 | 0 | 0 | (158,195) | -5.08% |
| 2D | Channing Hall | (17,698) | ($970) | (346) | (257) | 0 | 0 | 0 | (19,271) | -0.67% |
| 3D | Spectrum Academy | (15,046) | ($780) | (2,230) | 1,831 | 0 | 0 | 0 | (16,225) | -0.62% |
| 4D | Syracuse Arts Academy | (37,745) | ($2,302) | (719) | (252) | 0 | 0 | 0 | (41,018) | -0.89% |
| 5D | George Washington Academy | (166,404) | ($9,320) | (567) | (349) | 0 | 0 | 0 | (176,640) | -3.94% |
| 6D | Noah Webster Academy | (105,054) | ($3,666) | (308) | (215) | 0 | 0 | 0 | (109,243) | -4.60% |

**Scenario VI and Current Comparison by Program** *Uses average of CY Oct 1 and PY Feb 1 as current year; LRF at 100% per Pupil*

| ID | LEA | K-12 | Pro Staff | WPU Flex | Gifted | Board Local | Voted Local | LRF | Total | Percent |
|---|---|---|---|---|---|---|---|---|---|---|
| 7D | Salt Lake SPA | $ (236,559) | $ (24,936) | $ (137) | $ (290) | $ - | $ - | $ - | $ (261,922) | -16.07% |
| 8D | Open Classroom | (2,609) | ($262) | (219) | (61) | 0 | 0 | 0 | (3,151) | -0.18% |
| 9D | Canyon Rim Academy | 434 | $31 | (276) | (164) | 0 | 0 | 0 | 25 | 0.00% |
| 1E | Guadalupe Schools | 0 | $0 | (58) | 0 | 0 | 0 | 0 | (58) | -0.01% |
| 2E | Karl G. Maeser Prep Ac | (32,961) | ($1,627) | (362) | (540) | 0 | 0 | 0 | (35,490) | -1.11% |
| 3E | C.S. Lewis Academy | (19,858) | ($752) | (277) | (139) | 0 | 0 | 0 | (21,026) | -1.09% |
| 4E | Dual Immersion Academ | (56,762) | ($2,955) | (216) | (167) | 0 | 0 | 0 | (60,100) | -3.21% |
| 5E | Edith Bowen Lab School | (2,609) | ($285) | (181) | (30) | 0 | 0 | 0 | (3,105) | -0.23% |
| 7E | Gateway Preparatory | (81,131) | ($4,123) | (387) | (211) | 0 | 0 | 0 | (85,852) | -3.00% |
| 8E | Merit College Prep Acad | (891,912) | ($40,795) | (582) | (134) | 0 | 0 | 0 | (933,423) | -40.39% |
| 9E | Providence Hall | (362,180) | ($13,875) | (1,179) | (490) | 0 | 0 | 0 | (377,724) | -5.34% |
| 1F | Quest Academy | (262,476) | ($14,282) | (616) | (251) | 0 | 0 | 0 | (277,625) | -6.59% |
| 2F | Rockwell Charter High S | (442,791) | ($17,111) | (544) | (311) | 0 | 0 | 0 | (460,757) | -14.20% |
| 3F | Venture Academy | (492,685) | ($20,655) | (355) | (501) | 0 | 0 | 0 | (514,196) | -15.05% |
| 4F | SL Center for Science E | (109,188) | ($9,599) | (252) | (212) | 0 | 0 | 0 | (119,251) | -6.13% |
| 5F | Utah Virtual Academy | (118,484) | ($6,939) | (2,539) | 471 | 0 | 0 | 0 | (127,491) | -1.36% |
| 6F | Early Light Academy | (1,594) | ($96) | (484) | (228) | 0 | 0 | 0 | (2,402) | -0.07% |
| 7F | Excelsior Academy | (20,844) | ($841) | (324) | (330) | 0 | 0 | 0 | (22,339) | -0.75% |
| 8F | Hawthorn Academy | (7,074) | ($372) | (452) | (337) | 0 | 0 | 0 | (8,235) | -0.23% |
| 9F | Mountain Heights Acade | (26,613) | ($1,573) | (245) | (333) | 0 | 0 | 0 | (28,764) | -1.40% |
| 1G | Jefferson Academy | (51,543) | ($2,050) | (466) | (252) | 0 | 0 | 0 | (54,311) | -1.63% |
| 2G | Vista at Entrada | (22,876) | ($929) | (591) | (160) | 0 | 0 | 0 | (24,556) | -0.69% |
| 3G | Bear River Charter Scho | (2,609) | ($77) | (152) | (14) | 0 | 0 | 0 | (2,852) | -0.36% |
| 4G | Maria Montessori Acade | (244,618) | ($9,157) | (273) | (231) | 0 | 0 | 0 | (254,279) | -10.83% |
| 5G | Canyon Grove Academy | (222,011) | ($4,552) | (282) | (112) | 0 | 0 | 0 | (226,957) | -11.99% |
| 6G | Wellenmann School of D | (22,728) | ($1,263) | (298) | (233) | 0 | 0 | 0 | (24,522) | -0.96% |
| 7G | Summit Academy High S | (387,057) | ($13,491) | (419) | (590) | 0 | 0 | 0 | (401,557) | -13.23% |
| 8G | Good Foundations Acad | (24,062) | ($1,319) | (230) | (184) | 0 | 0 | 0 | (25,795) | -1.28% |
| 9G | Allanza Academy | (84,399) | ($3,944) | (280) | (155) | 0 | 0 | 0 | (88,778) | -4.36% |
| 2H | Utah Connections Acade | (707,936) | ($36,201) | (419) | (424) | 0 | 0 | 0 | (744,980) | -22.38% |
| 3H | Endeavor Hall | (164,315) | ($6,017) | (348) | (244) | 0 | 0 | 0 | (170,924) | -6.41% |
| 4H | Aristotle Academy | (43,586) | ($3,230) | (190) | 0 | 0 | 0 | 0 | (47,006) | -4.90% |
| 5H | High Mark Charter Scho | (428,559) | ($15,643) | (340) | (396) | 0 | 0 | 0 | (444,938) | -14.53% |
| 6H | Promontory School of El | (49,834) | ($2,017) | (240) | (209) | 0 | 0 | 0 | (52,300) | -2.57% |
| 7H | Pacific Heritage Academ | 0 | $0 | (211) | (191) | 0 | 0 | 0 | (402) | -0.02% |
| 8H | Valley Arts Academy | (17,511) | ($1,014) | (225) | 0 | 0 | 0 | 0 | (18,750) | -1.04% |
| 9H | Pioneer High School | (946,233) | ($23,656) | (285) | (541) | 0 | 0 | 0 | (970,715) | -38.25% |
| 1I | Utah International Schoo | 0 | $0 | (109) | (15) | 0 | 0 | 0 | (124) | -0.02% |
| 3I | Leadership Learning Ac | (19,858) | ($1,115) | (248) | (137) | 0 | 0 | 0 | (21,358) | -1.11% |
| 4I | Mana Academy Charter | (77,404) | ($4,542) | (296) | (353) | 0 | 0 | 0 | (82,595) | -2.81% |
| 5I | Voyage Academy | (2,609) | ($90) | (249) | (213) | 0 | 0 | 0 | (3,161) | -0.15% |
| 7I | WSU Charter Academy | 0 | $0 | (18) | 6 | 0 | 0 | 0 | (12) | -0.01% |
| 9I | Utah Career Path High S | (59,140) | ($5,213) | (106) | (154) | 0 | 0 | 0 | (64,613) | -6.69% |

*Highlighted schools waived G&T funds.

**Scenario PY ADM+ or CY FE Three-Year Phase-In**

*All LEAs K-12 Funds based on the Greater of Prior-Year ADM plus Growth, or Current-Year Fall Enrollment*

| ID | LEA | K-12 | Pro Staff | WPU Flex | Gifted | Board Local | Voted Local | Total | Percent | Change per Year |
|---|---|---|---|---|---|---|---|---|---|---|
| | Charters | $0 | $0 | ($46,960) | ($6,857) | $0 | $0 | ($53,817) | 0.0% | ($17,937) |
| | Districts | $51,787,478 | $4,846,510 | $46,960 | $6,857 | $1,669,793 | $5,992,892 | $64,350,490 | 3.6% | $21,450,161 |
| | Statewide | $51,787,478 | $4,846,510 | $0 | $0 | $1,669,793 | $5,992,892 | $64,296,673 | 3.3% | $21,432,224 |
| 1 | Alpine | $6,250,565 | $523,571 | $5,260 | $180 | $255,731 | $1,022,923 | $8,058,230 | 3.4% | $2,686,077 |
| 2 | Beaver | 11,190 | 1,040 | (1,783) | (186) | 0 | 0 | 10,261 | 0.2% | 3,420 |
| 3 | Box Elder | 1,099,461 | 106,896 | 1,358 | 237 | 45,542 | 68,312 | 1,321,806 | 3.8% | 440,602 |
| 4 | Cache | 1,512,147 | 139,459 | 1,529 | 227 | 62,350 | 249,402 | 1,965,114 | 3.8% | 655,038 |
| 5 | Carbon | 281,890 | 25,056 | (905) | (2) | 0 | 0 | 306,039 | 2.9% | 102,013 |
| 6 | Daggett | 21,198 | 1,773 | (228) | 7 | 0 | 0 | 22,750 | 1.6% | 7,583 |
| 7 | Davis | 6,619,081 | 648,001 | 13,039 | 1,221 | 274,339 | 1,097,358 | 8,653,039 | 3.9% | 2,884,346 |
| 8 | Duchesne | 760,187 | 67,108 | 2,745 | 512 | 0 | 0 | 830,552 | 5.0% | 276,851 |
| 9 | Emery | 228,963 | 21,534 | (407) | 50 | 0 | 0 | 250,140 | 2.9% | 83,380 |
| 10 | Garfield | 47,248 | 4,921 | (1,154) | (48) | 0 | 0 | 50,967 | 0.9% | 16,989 |
| 11 | Grand | 169,513 | 15,709 | 104 | 70 | 0 | 0 | 185,396 | 3.9% | 61,799 |
| 12 | Granite | 8,077,134 | 803,643 | 28,405 | 3,508 | 335,258 | 1,341,032 | 10,588,980 | 5.1% | 3,529,660 |
| 13 | Iron | 653,321 | 64,927 | (1,787) | (126) | 27,115 | 54,229 | 797,679 | 2.9% | 265,893 |
| 14 | Jordan | 4,587,586 | 400,217 | 3,590 | 153 | 165,032 | 660,131 | 5,816,709 | 3.5% | 1,938,903 |
| 15 | Juab | 192,073 | 15,811 | (107) | (2) | 7,847 | 7,847 | 223,469 | 3.3% | 74,490 |
| 16 | Kane | 72,431 | 6,752 | (1,128) | (47) | 0 | 0 | 78,008 | 1.3% | 26,003 |
| 17 | Millard | 105,501 | 10,773 | (2,434) | (205) | 0 | 0 | 113,635 | 1.1% | 37,878 |
| 18 | Morgan | 161,617 | 13,922 | (393) | (94) | 0 | 0 | 175,052 | 2.2% | 58,351 |
| 19 | Nebo | 3,060,773 | 277,508 | 2,806 | 626 | 126,023 | 409,575 | 3,877,311 | 3.8% | 1,292,437 |
| 20 | North Sanpete | 345,430 | 31,559 | 996 | 213 | 14,231 | 56,925 | 449,354 | 5.9% | 149,785 |
| 21 | North Summit | 15,694 | 1,646 | (1,051) | (104) | 0 | 0 | 16,185 | 0.4% | 5,395 |
| 22 | Park City | 295,573 | 34,730 | (465) | (155) | 0 | 0 | 329,683 | 2.3% | 109,894 |
| 23 | Piute | 4,908 | 419 | (537) | (31) | 200 | 165 | 5,124 | 0.3% | 1,708 |
| 24 | Rich | 38,005 | 3,634 | (294) | (4) | 0 | 0 | 41,341 | 1.5% | 13,780 |
| 25 | San Juan | 89,447 | 8,550 | (2,540) | (256) | 3,700 | 14,799 | 113,700 | 0.8% | 37,900 |
| 26 | Sevier | 178,515 | 19,068 | (2,957) | (321) | 7,458 | 11,187 | 212,950 | 1.3% | 70,983 |
| 27 | South Sanpete | 289,071 | 29,778 | (402) | 30 | 12,037 | 48,149 | 378,663 | 3.2% | 126,221 |
| 28 | South Summit | 6,955 | 679 | (1,529) | (182) | 0 | 0 | 5,923 | 0.1% | 1,974 |
| 29 | Tintic | 322 | 27 | (525) | (32) | 13 | 53 | (142) | 0.0% | (47) |
| 30 | Tooele | 1,622,680 | 143,244 | 3,622 | 644 | 66,665 | 100,666 | 1,937,521 | 4.3% | 645,840 |
| 31 | Uintah | 819,040 | 66,714 | 1,851 | 272 | 0 | 0 | 887,877 | 3.9% | 295,959 |
| 32 | Wasatch | 289,097 | 28,128 | (2,493) | (306) | 0 | 0 | 314,426 | 1.8% | 104,809 |
| 33 | Washington | 1,336,929 | 132,243 | (10,713) | (1,454) | 0 | 0 | 1,457,005 | 1.7% | 485,668 |
| 34 | Wayne | 0 | 0 | (861) | (65) | 0 | 0 | (926) | 0.0% | (309) |
| 35 | Weber | 2,596,681 | 248,102 | (3,707) | (59) | 107,394 | 301,507 | 3,249,918 | 3.3% | 1,083,306 |
| 36 | Salt Lake | 3,459,362 | 378,704 | 15,358 | 2,177 | 0 | 0 | 3,855,601 | 5.4% | 1,285,200 |
| 37 | Ogden | 1,364,168 | 120,117 | 3,470 | 471 | 56,033 | 180,004 | 1,724,263 | 4.6% | 574,754 |
| 38 | Provo | 2,515,050 | 208,730 | 13,295 | 1,914 | 102,825 | 368,628 | 3,210,442 | 7.3% | 1,070,147 |
| 39 | Logan | 201,328 | 19,575 | (3,052) | (459) | 0 | 0 | 217,392 | 1.2% | 72,464 |
| 40 | Murray | 497,526 | 52,946 | (235) | (72) | 0 | 0 | 550,165 | 2.8% | 183,388 |
| 42 | Canyons | 1,909,818 | 169,296 | (8,781) | (1,445) | 0 | 0 | 2,068,888 | 2.0% | 689,629 |

**Scenario PY ADM+ or CY FE Three-Year Phase-In**

*All LEAs K-12 Funds based on the Greater of Prior-Year ADM plus Growth, or Current-Year Fall Enrollment*

| ID | LEA | K-12 | Pro Staff | WPU Flex | Gifted | Board Local | Voted Local | Total | Percent | Change per Year |
|---|---|---|---|---|---|---|---|---|---|---|
| 68 | Ogden Preparatc | $0 | $0 | ($878) | ($127) | $0 | $0 | ($1,005) | 0.0% | ($335) |
| 74 | American Prepar | 0 | 0 | (2,725) | (425) | 0 | 0 | (3,150) | 0.0% | (1,050) |
| 81 | Walden School | 0 | 0 | (473) | (66) | 0 | 0 | (539) | 0.0% | (180) |
| 82 | Freedom Acade | 0 | 0 | (642) | (116) | 0 | 0 | (758) | 0.0% | (253) |
| 83 | AMES | 0 | 0 | (405) | (80) | 0 | 0 | (485) | 0.0% | (162) |
| 86 | Pinnacle Canyon | 0 | 0 | (808) | (68) | 0 | 0 | (876) | -0.1% | (292) |
| 87 | City Academy | 0 | 0 | (298) | (35) | 0 | 0 | (333) | 0.0% | (111) |
| 89 | Soldier Hollow S | 0 | 0 | (246) | (32) | 0 | 0 | (278) | 0.0% | (93) |
| 90 | Tuacahn Perform | 0 | 0 | (316) | (61) | 0 | 0 | (377) | 0.0% | (126) |
| 92 | Uintah River Higl | 0 | 0 | (108) | 0 | 0 | 0 | (108) | 0.0% | (36) |
| 93 | John Hancock | 0 | 0 | (153) | (22) | 0 | 0 | (175) | 0.0% | (58) |
| 94 | Thomas Edison | 0 | 0 | (1,063) | (157) | 0 | 0 | (1,220) | 0.0% | (407) |
| 95 | Timpanogos Aca | 0 | 0 | (236) | (50) | 0 | 0 | (286) | 0.0% | (95) |
| 97 | Salt Lake Arts Ac | 0 | 0 | (242) | (49) | 0 | 0 | (291) | 0.0% | (97) |
| 98 | Fast Forward Hig | 0 | 0 | (254) | (37) | 0 | 0 | (291) | 0.0% | (97) |
| A1 | NUAMES | 0 | 0 | (520) | (80) | 0 | 0 | (600) | 0.0% | (200) |
| A2 | Ranches Acader | 0 | 0 | (283) | 0 | 0 | 0 | (283) | 0.0% | (94) |
| A3 | DaVinci Academ | 0 | 0 | (982) | (143) | 0 | 0 | (1,125) | 0.0% | (375) |
| A4 | Summit Academ | 0 | 0 | (680) | (117) | 0 | 0 | (797) | 0.0% | (266) |
| A5 | Itineris Early Coll | 0 | 0 | (182) | (49) | 0 | 0 | (231) | 0.0% | (77) |
| A6 | North Davis Prep | 0 | 0 | (628) | (122) | 0 | 0 | (750) | 0.0% | (250) |
| A7 | Moab Communit | 0 | 0 | (74) | 0 | 0 | 0 | (74) | 0.0% | (25) |
| A8 | East Hollywood H | 0 | 0 | (289) | (49) | 0 | 0 | (338) | 0.0% | (113) |
| A9 | SUCCESS Acad | 0 | 0 | (230) | (60) | 0 | 0 | (290) | 0.0% | (97) |
| 1B | UCAS | 0 | 0 | (346) | (64) | 0 | 0 | (410) | 0.0% | (137) |
| 2B | Lincoln Academy | 0 | 0 | (558) | (85) | 0 | 0 | (643) | 0.0% | (214) |
| 3B | Beehive Science | 0 | 0 | (210) | (42) | 0 | 0 | (252) | 0.0% | (84) |
| 4B | Wasatch Peak A | 0 | 0 | (258) | (45) | 0 | 0 | (303) | 0.0% | (101) |
| 5B | North Star Acade | 0 | 0 | (351) | (65) | 0 | 0 | (416) | 0.0% | (139) |
| 7B | Reagan Academ | 0 | 0 | (526) | (78) | 0 | 0 | (604) | 0.0% | (201) |
| 8B | American Leader | 0 | 0 | (1,502) | (222) | 0 | 0 | (1,724) | 0.0% | (575) |
| 9B | Navigator Pointe | 0 | 0 | (397) | (61) | 0 | 0 | (458) | 0.0% | (153) |
| 1C | Odyssey Charter | 0 | 0 | (357) | (61) | 0 | 0 | (418) | 0.0% | (139) |
| 2C | Intech Collegiate | 0 | 0 | (285) | (28) | 0 | 0 | (313) | 0.0% | (104) |
| 3C | Entheos Academ | 0 | 0 | (713) | (124) | 0 | 0 | (837) | 0.0% | (279) |
| 4C | Lakeview Acader | 0 | 0 | (578) | (112) | 0 | 0 | (690) | 0.0% | (230) |
| 5C | Legacy Preparat | 0 | 0 | (847) | (131) | 0 | 0 | (978) | 0.0% | (326) |
| 6C | Liberty Academy | 0 | 0 | (368) | (46) | 0 | 0 | (414) | 0.0% | (138) |
| 7C | Monticello Acade | 0 | 0 | (492) | (91) | 0 | 0 | (583) | 0.0% | (194) |
| 8C | Mountainville Ac | 0 | 0 | (515) | (90) | 0 | 0 | (605) | 0.0% | (202) |
| 9C | Paradigm High S | 0 | 0 | (509) | (98) | 0 | 0 | (607) | 0.0% | (202) |
| 1D | Renaissance Ac | 0 | 0 | (430) | (83) | 0 | 0 | (513) | 0.0% | (171) |
| 2D | Channing Hall | 0 | 0 | (450) | (76) | 0 | 0 | (526) | 0.0% | (175) |
| 3D | Spectrum Acade | 0 | 0 | (2,424) | (73) | 0 | 0 | (2,497) | -0.1% | (832) |
| 4D | Syracuse Arts Ac | 0 | 0 | (895) | (125) | 0 | 0 | (1,020) | 0.0% | (340) |
| 5D | George Washing | 0 | 0 | (730) | (116) | 0 | 0 | (846) | 0.0% | (282) |
| 6D | Noah Webster A | 0 | 0 | (396) | (64) | 0 | 0 | (460) | 0.0% | (153) |

*Highlighted schools waived G&T funds.

**Scenario PY ADM+ or CY FE Three-Year Phase-In**

*All LEAs K-12 Funds based on the Greater of Prior-Year ADM plus Growth, or Current-Year Fall Enrollment*

| ID | LEA | K-12 | Pro Staff | WPU Flex | Gifted | Board Local | Voted Local | Total | Percent | Change per Year |
|---|---|---|---|---|---|---|---|---|---|---|
| 7D | Salt Lake SPA | $0 | $0 | ($194) | ($45) | $0 | $0 | ($239) | 0.0% | ($80) |
| 8D | Open Classroom | 0 | 0 | (285) | (46) | 0 | 0 | (331) | 0.0% | (110) |
| 9D | Canyon Rim Academy | 0 | 0 | (358) | (59) | 0 | 0 | (417) | 0.0% | (139) |
| 1E | Guadalupe Schools | 0 | 0 | (77) | 0 | 0 | 0 | (77) | 0.0% | (26) |
| 2E | Karl G. Maeser Prep Ac | 0 | 0 | (478) | (95) | 0 | 0 | (573) | 0.0% | (191) |
| 3E | C.S. Lewis Academy | 0 | 0 | (348) | (52) | 0 | 0 | (400) | 0.0% | (133) |
| 4E | Dual Immersion Acader | 0 | 0 | (282) | (49) | 0 | 0 | (331) | 0.0% | (110) |
| 5E | Edith Bowen Lab Schoc | 0 | 0 | (232) | (33) | 0 | 0 | (265) | 0.0% | (88) |
| 7E | Gateway Preparatory | 0 | 0 | (494) | (78) | 0 | 0 | (572) | 0.0% | (191) |
| 8E | Merit College Prep Aca | 0 | 0 | (699) | (83) | 0 | 0 | (782) | 0.0% | (261) |
| 9E | Providence Hall | 0 | 0 | (1,452) | (193) | 0 | 0 | (1,645) | 0.0% | (548) |
| 1F | Quest Academy | 0 | 0 | (774) | (112) | 0 | 0 | (886) | 0.0% | (295) |
| 2F | Rockwell Charter High S | 0 | 0 | (684) | (104) | 0 | 0 | (788) | 0.0% | (263) |
| 3F | Venture Academy | 0 | 0 | (477) | (97) | 0 | 0 | (574) | 0.0% | (191) |
| 4F | SL Center for Science E | 0 | 0 | (325) | (57) | 0 | 0 | (382) | 0.0% | (127) |
| 5F | Utah Virtual Academy | 0 | 0 | (2,953) | (261) | 0 | 0 | (3,214) | -0.1% | (1,071) |
| 6F | Early Light Academy | 0 | 0 | (611) | (91) | 0 | 0 | (702) | 0.0% | (234) |
| 7F | Excelsior Academy | 0 | 0 | (429) | (79) | 0 | 0 | (508) | 0.0% | (169) |
| 8F | Hawthorn Academy | 0 | 0 | (585) | (99) | 0 | 0 | (684) | 0.0% | (228) |
| 9F | Mountain Heights Acad | 0 | 0 | (321) | (59) | 0 | 0 | (380) | 0.0% | (127) |
| 1G | Jefferson Academy | 0 | 0 | (589) | (90) | 0 | 0 | (679) | 0.0% | (226) |
| 2G | Vista at Entrada | 0 | 0 | (728) | (96) | 0 | 0 | (824) | 0.0% | (275) |
| 3G | Bear River Charter Sch | 0 | 0 | (183) | (21) | 0 | 0 | (204) | 0.0% | (68) |
| 4G | Maria Montessori Acad | 0 | 0 | (357) | (61) | 0 | 0 | (418) | 0.0% | (139) |
| 5G | Canyon Grove Academ | 0 | 0 | (353) | (49) | 0 | 0 | (402) | 0.0% | (134) |
| 6G | Weilenmann School of | 0 | 0 | (391) | (68) | 0 | 0 | (459) | 0.0% | (153) |
| 7G | Summit Academy High | 0 | 0 | (538) | (96) | 0 | 0 | (634) | 0.0% | (211) |
| 8G | Good Foundations Aca | 0 | 0 | (301) | (52) | 0 | 0 | (353) | 0.0% | (118) |
| 9G | Allanza Academy | 0 | 0 | (356) | (54) | 0 | 0 | (410) | 0.0% | (137) |
| 2H | Utah Connections Acad | 0 | 0 | (541) | (94) | 0 | 0 | (635) | 0.0% | (212) |
| 3H | Endeavor Hall | 0 | 0 | (445) | (72) | 0 | 0 | (517) | 0.0% | (172) |
| 4H | Aristotle Academy | 0 | 0 | (228) | 0 | 0 | 0 | (228) | 0.0% | (76) |
| 5H | High Mark Charter Sch | 0 | 0 | (449) | (83) | 0 | 0 | (532) | 0.0% | (177) |
| 6H | Promontory School of E | 0 | 0 | (313) | (54) | 0 | 0 | (367) | 0.0% | (122) |
| 7H | Pacific Heritage Acader | 0 | 0 | (275) | (47) | 0 | 0 | (322) | 0.0% | (107) |
| 8H | Valley Arts Academy | 0 | 0 | (290) | 0 | 0 | 0 | (290) | 0.0% | (97) |
| 9H | Pioneer High School | 0 | 0 | (376) | (75) | 0 | 0 | (451) | 0.0% | (150) |
| 1I | Utah International Scho | 0 | 0 | (131) | (16) | 0 | 0 | (147) | 0.0% | (49) |
| 3I | Leadership Learning Ac | 0 | 0 | (318) | (49) | 0 | 0 | (367) | 0.0% | (122) |
| 4I | Mana Academy Charter | 0 | 0 | (399) | (77) | 0 | 0 | (476) | 0.0% | (159) |
| 5I | Voyage Academy | 0 | 0 | (325) | (57) | 0 | 0 | (382) | 0.0% | (127) |
| 7I | WSU Charter Academy | 0 | 0 | (23) | (1) | 0 | 0 | (24) | 0.0% | (8) |
| 9I | Utah Career Path High | 0 | 0 | (141) | (28) | 0 | 0 | (169) | 0.0% | (56) |

*Highlighted schools waived G&T funds.

**Scenario X: FY14 October 1 LEA Formula, Basic Levy Change**

| | FY14 Current K12 and Associated Programs | | | FY14 K12 and Associated Programs Scenario | | | Current - Scenario Change | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | K-12+ Funds | Basic Levy Rate | Basic Levy Yield | K-12+ Funds | Basic Levy Rate | Basic Levy Yield | K-12+ Funds | Basic Levy Rate | Basic Levy Yield | Net | Percent |
| Total | $ 1,771,636,112 | 0.001535 | $ 306,814,191 | $ 1,835,986,602 | 0.001857 | $ 371,175,208 | $ 64,350,490 | 0.000322 | $ 64,361,017 | $ (10,527) | 0.0% |
| Alpine | $ 233,576,402 | 0.001535 | $ 25,446,597 | $ 241,634,632 | 0.001857 | $ 30,784,580 | $ 8,058,230 | 0.000322 | $ 5,337,983 | $ 2,720,247 | 1.2% |
| Beaver | 5,911,850 | 0.001535 | 1,874,027 | 5,922,111 | 0.001857 | 2,267,146 | 10,261 | 0.000322 | 393,119 | (382,858) | -6.5% |
| Box Elder | 34,579,196 | 0.001535 | 5,515,946 | 35,901,002 | 0.001857 | 6,673,037 | 1,321,806 | 0.000322 | 1,157,091 | 164,715 | 0.5% |
| Cache | 51,735,072 | 0.001535 | 6,076,079 | 53,700,186 | 0.001857 | 7,350,670 | 1,965,114 | 0.000322 | 1,274,591 | 690,523 | 1.3% |
| Carbon | 10,465,654 | 0.001535 | 3,219,558 | 10,771,693 | 0.001857 | 3,894,931 | 306,039 | 0.000322 | 675,373 | (369,334) | -3.5% |
| Daggett | 1,399,601 | 0.001535 | 434,261 | 1,422,351 | 0.001857 | 525,357 | 22,750 | 0.000322 | 91,096 | (68,346) | -4.9% |
| Davis | 220,838,281 | 0.001535 | 26,136,922 | 229,491,320 | 0.001857 | 31,619,716 | 8,653,039 | 0.000322 | 5,482,794 | 3,170,245 | 1.4% |
| Duchesne | 16,558,286 | 0.001535 | 3,940,836 | 17,388,838 | 0.001857 | 4,767,513 | 830,552 | 0.000322 | 826,677 | 3,875 | 0.0% |
| Emery | 8,590,438 | 0.001535 | 3,201,550 | 8,840,578 | 0.001857 | 3,873,145 | 250,140 | 0.000322 | 671,595 | (421,455) | -4.9% |
| Garfield | 5,484,856 | 0.001535 | 1,186,426 | 5,535,823 | 0.001857 | 1,435,304 | 50,967 | 0.000322 | 248,878 | (197,911) | -3.6% |
| Grand | 4,745,665 | 0.001535 | 2,321,555 | 4,931,061 | 0.001857 | 2,808,553 | 185,396 | 0.000322 | 486,998 | (301,602) | -6.4% |
| Granite | 207,382,998 | 0.001535 | 32,736,812 | 217,971,978 | 0.001857 | 39,604,078 | 10,588,980 | 0.000322 | 6,867,266 | 3,721,714 | 1.8% |
| Iron | 27,399,261 | 0.001535 | 4,536,991 | 28,196,940 | 0.001857 | 5,488,724 | 797,679 | 0.000322 | 951,733 | (154,054) | -0.6% |
| Jordan | 166,472,559 | 0.001535 | 21,713,399 | 172,289,268 | 0.001857 | 26,268,261 | 5,816,709 | 0.000322 | 4,554,862 | 1,261,847 | 0.8% |
| Juab | 6,795,035 | 0.001535 | 1,238,264 | 7,018,504 | 0.001857 | 1,498,017 | 223,469 | 0.000322 | 259,753 | (36,284) | -0.5% |
| Kane | 6,184,253 | 0.001535 | 1,897,047 | 6,262,261 | 0.001857 | 2,294,995 | 78,008 | 0.000322 | 397,948 | (319,940) | -5.2% |
| Millard | 10,136,555 | 0.001535 | 3,399,808 | 10,250,190 | 0.001857 | 4,112,992 | 113,635 | 0.000322 | 713,184 | (599,549) | -5.9% |
| Morgan | 7,939,427 | 0.001535 | 1,430,914 | 8,114,479 | 0.001857 | 1,731,079 | 175,052 | 0.000322 | 300,165 | (125,113) | -1.6% |
| Nebo | 101,817,068 | 0.001535 | 9,484,371 | 105,694,379 | 0.001857 | 11,473,926 | 3,877,311 | 0.000322 | 1,989,555 | 1,887,756 | 1.9% |
| North Sanpete | 7,601,710 | 0.001535 | 1,041,862 | 8,051,064 | 0.001857 | 1,260,415 | 449,354 | 0.000322 | 218,553 | 230,801 | 3.0% |
| North Summit | 4,122,020 | 0.001535 | 1,505,886 | 4,138,205 | 0.001857 | 1,821,778 | 16,185 | 0.000322 | 315,892 | (299,707) | -7.3% |
| Park City | 14,497,293 | 0.001535 | 17,501,148 | 14,826,976 | 0.001857 | 21,172,398 | 329,683 | 0.000322 | 3,671,250 | (3,341,567) | -23.0% |
| Piute | 1,988,282 | 0.001535 | 186,835 | 1,993,406 | 0.001857 | 226,028 | 5,124 | 0.000322 | 39,193 | (34,069) | -1.7% |
| Rich | 2,725,726 | 0.001535 | 1,239,224 | 2,767,067 | 0.001857 | 1,499,178 | 41,341 | 0.000322 | 259,954 | (218,613) | -8.0% |
| San Juan | 13,613,278 | 0.001535 | 1,459,867 | 13,726,978 | 0.001857 | 1,766,106 | 113,700 | 0.000322 | 306,239 | (192,539) | -1.4% |
| Sevier | 16,215,519 | 0.001535 | 2,327,887 | 16,428,469 | 0.001857 | 2,816,213 | 212,950 | 0.000322 | 488,326 | (275,376) | -1.7% |
| South Sanpete | 11,907,315 | 0.001535 | 863,974 | 12,285,978 | 0.001857 | 1,045,211 | 378,663 | 0.000322 | 181,237 | 197,426 | 1.7% |
| South Summit | 4,992,156 | 0.001535 | 2,417,135 | 4,998,079 | 0.001857 | 2,924,182 | 5,923 | 0.000322 | 507,047 | (501,124) | -10.0% |
| Tintic | 2,187,169 | 0.001535 | 84,683 | 2,187,027 | 0.001857 | 102,447 | (142) | 0.000322 | 17,764 | (17,906) | -0.8% |
| Tooele | 45,466,938 | 0.001535 | 4,917,649 | 47,404,459 | 0.001857 | 5,949,234 | 1,937,521 | 0.000322 | 1,031,585 | 905,936 | 2.0% |
| Uintah | 22,693,269 | 0.001535 | 8,453,025 | 23,581,146 | 0.001857 | 10,226,233 | 887,877 | 0.000322 | 1,773,208 | (885,331) | -3.9% |
| Wasatch | 17,678,228 | 0.001535 | 6,134,789 | 17,992,654 | 0.001857 | 7,421,696 | 314,426 | 0.000322 | 1,286,907 | (972,481) | -5.5% |
| Washington | 83,562,949 | 0.001535 | 17,675,768 | 85,019,954 | 0.001857 | 21,383,649 | 1,457,005 | 0.000322 | 3,707,881 | (2,250,876) | -2.7% |
| Wayne | 2,778,801 | 0.001535 | 491,694 | 2,777,875 | 0.001857 | 594,838 | (926) | 0.000322 | 103,144 | (104,070) | -3.7% |
| Weber | 98,977,040 | 0.001535 | 12,615,263 | 102,226,958 | 0.001857 | 15,261,591 | 3,249,918 | 0.000322 | 2,646,328 | 603,590 | 0.6% |
| Salt Lake | 71,153,349 | 0.001535 | 27,479,103 | 75,008,950 | 0.001857 | 33,243,449 | 3,855,601 | 0.000322 | 5,764,346 | (1,908,745) | -2.7% |
| Ogden | 37,439,679 | 0.001535 | 5,137,072 | 39,163,942 | 0.001857 | 6,214,686 | 1,724,263 | 0.000322 | 1,077,614 | 646,649 | 1.7% |
| Provo | 44,166,062 | 0.001535 | 7,139,499 | 47,376,504 | 0.001857 | 8,637,166 | 3,210,442 | 0.000322 | 1,497,667 | 1,712,775 | 3.9% |
| Logan | 18,260,317 | 0.001535 | 3,356,049 | 18,477,709 | 0.001857 | 4,060,054 | 217,392 | 0.000322 | 704,005 | (486,613) | -2.7% |
| Murray | 19,592,111 | 0.001535 | 4,546,954 | 20,142,276 | 0.001857 | 5,500,777 | 550,165 | 0.000322 | 953,823 | (403,658) | -2.1% |
| Canyons | 102,004,444 | 0.001535 | 24,447,462 | 104,073,332 | 0.001857 | 29,575,854 | 2,068,888 | 0.000322 | 5,128,392 | (3,059,504) | -3.0% |

*Note: Associated Programs are Professional Staff Cost, WPU Flex, Gifted and Talented, and Board and Voted Local Levies.*

**Scenario X: FY14 State Board Levy in Lieu of Implied Current Property Tax**

| | | FY14 Current Implied Tax | | FY14 Scenario State Board | Current - Scenario Change *Changes in Taxes Paid* | |
|---|---|---|---|---|---|---|
| | | Contribution | Rate | 0.000057 | Change | Percent |
| | Total | $ 11,394,765 | ---- | $ 11,393,100 | $ (1,665) | 0.0% |
| 1 | Alpine | $ 1,241,098 | 0.007164 | $ 944,922 | $ (296,176) | -24% |
| 2 | Beaver | 3,514 | 0.005100 | 69,589 | 66,075 | 1880% |
| 3 | Box Elder | 182,181 | 0.007079 | 204,827 | 22,646 | 12% |
| 4 | Cache | 212,302 | 0.005391 | 225,626 | 13,324 | 6% |
| 5 | Carbon | 137,311 | 0.005651 | 119,554 | (17,758) | -13% |
| 6 | Daggett | 1,622 | 0.002908 | 16,126 | 14,504 | 894% |
| 7 | Davis | 1,440,839 | 0.007175 | 970,557 | (470,283) | -33% |
| 8 | Duchesne | 13,785 | 0.006156 | 146,337 | 132,552 | 962% |
| 9 | Emery | 17,029 | 0.004118 | 118,885 | 101,856 | 598% |
| 10 | Garfield | 4,809 | 0.005121 | 44,056 | 39,247 | 816% |
| 11 | Grand | 34,598 | 0.004179 | 86,208 | 51,609 | 149% |
| 12 | Granite | 1,500,938 | 0.004859 | 1,215,634 | (285,304) | -19% |
| 13 | Iron | 170,473 | 0.006507 | 168,475 | (1,999) | -1% |
| 14 | Jordan | 1,708,284 | 0.004997 | 806,296 | (901,988) | -53% |
| 15 | Juab | 8,920 | 0.006535 | 45,981 | 37,061 | 415% |
| 16 | Kane | 5,406 | 0.003484 | 70,444 | 65,038 | 1203% |
| 17 | Millard | 2,973 | 0.004449 | 126,247 | 123,274 | 4146% |
| 18 | Morgan | 5,649 | 0.006270 | 53,135 | 47,486 | 841% |
| 19 | Nebo | 533,562 | 0.007991 | 352,188 | (181,373) | -34% |
| 20 | North Sanpete | 16,068 | 0.006067 | 38,688 | 22,620 | 141% |
| 21 | North Summit | 7,028 | 0.004874 | 55,919 | 48,891 | 696% |
| 22 | Park City | 127,040 | 0.003095 | 649,880 | 522,840 | 412% |
| 23 | Piute | 1,083 | 0.005116 | 6,938 | 5,855 | 540% |
| 24 | Rich | 811 | 0.003419 | 46,017 | 45,206 | 5575% |
| 25 | San Juan | 6,217 | 0.006316 | 54,210 | 47,993 | 772% |
| 26 | Sevier | 10,535 | 0.004992 | 86,443 | 75,907 | 720% |
| 27 | South Sanpete | 13,828 | 0.007790 | 32,082 | 18,255 | 132% |
| 28 | South Summit | 17,029 | 0.005217 | 89,757 | 72,728 | 427% |
| 29 | Tintic | - | 0.006161 | 3,145 | 3,145 | ----- |
| 30 | Tooele | 108,122 | 0.008058 | 182,610 | 74,488 | 69% |
| 31 | Uintah | 33,517 | 0.004726 | 313,891 | 280,374 | 837% |
| 32 | Wasatch | 98,118 | 0.006075 | 227,806 | 129,688 | 132% |
| 33 | Washington | 787,770 | 0.006009 | 656,364 | (131,406) | -17% |
| 34 | Wayne | 1,562 | 0.002212 | 18,258 | 16,696 | 1069% |
| 35 | Weber | 534,299 | 0.005385 | 468,449 | (65,850) | -12% |
| 36 | Salt Lake | 691,693 | 0.004516 | 1,020,397 | 328,704 | 48% |
| 37 | Ogden | 379,206 | 0.007219 | 190,758 | (188,449) | -50% |
| 38 | Provo | 330,037 | 0.005559 | 265,115 | (64,922) | -20% |
| 39 | Logan | 217,320 | 0.006573 | 124,622 | (92,698) | -43% |
| 40 | Murray | 35,409 | 0.004868 | 168,845 | 133,435 | 377% |
| 41 | Canyons | 752,780 | 0.004881 | 907,821 | 155,041 | 21% |

## Scenario XI: FY14 Local Replacement Funds and Basic Rate Change

| | | FY14 Current Implied Tax | | Basic | FY14 Scenario | | Basic | FY14 Current - Scenario Change | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | LRF Contribution | Rate | Rate Yield | LRF Contribution | Rate | Rate Yield | LRF Contribution | Basic Rate Yield | Net Tax | Percent |
| | | | | 0.001535 | | | 0.001592 | | 0.000057 | | |
| | Total | $ 11,394,765 | ---- | $ 306,814,186 | $ - | ----- | $ 318,207,286 | $ (11,394,765) | $ 11,393,100 | $ (1,665) | 0.0% |
| 1 | Alpine | $ 1,241,098 | 0.007164 | $ 25,446,597 | $ - | - | $ 26,391,519 | $ (1,241,098) | $ 944,922 | $ (296,176) | -1.1% |
| 2 | Beaver | 3,514 | 0.005100 | 1,874,027 | - | - | 1,943,617 | (3,514) | 69,589 | 66,075 | 3.5% |
| 3 | Box Elder | 182,181 | 0.007079 | 5,515,946 | - | - | 5,720,772 | (182,181) | 204,827 | 22,646 | 0.4% |
| 4 | Cache | 212,302 | 0.005391 | 6,076,079 | - | - | 6,301,705 | (212,302) | 225,626 | 13,324 | 0.2% |
| 5 | Carbon | 137,311 | 0.005651 | 3,219,558 | - | - | 3,339,112 | (137,311) | 119,554 | (17,758) | -0.5% |
| 6 | Daggett | 1,622 | 0.002908 | 434,261 | - | - | 450,387 | (1,622) | 16,126 | 14,504 | 3.3% |
| 7 | Davis | 1,440,839 | 0.007175 | 26,136,922 | - | - | 27,107,478 | (1,440,839) | 970,557 | (470,283) | -1.7% |
| 8 | Duchesne | 13,785 | 0.006156 | 3,940,836 | - | - | 4,087,173 | (13,785) | 146,337 | 132,552 | 3.4% |
| 9 | Emery | 17,029 | 0.004118 | 3,201,550 | - | - | 3,320,435 | (17,029) | 118,885 | 101,856 | 3.2% |
| 10 | Garfield | 4,809 | 0.005121 | 1,186,426 | - | - | 1,230,482 | (4,809) | 44,056 | 39,247 | 3.3% |
| 11 | Grand | 34,598 | 0.004179 | 2,321,555 | - | - | 2,407,763 | (34,598) | 86,208 | 51,609 | 2.2% |
| 12 | Granite | 1,500,938 | 0.004859 | 32,736,812 | - | - | 33,952,446 | (1,500,938) | 1,215,634 | (285,304) | -0.8% |
| 13 | Iron | 170,473 | 0.006507 | 4,536,991 | - | - | 4,705,465 | (170,473) | 168,475 | (1,999) | 0.0% |
| 14 | Jordan | 1,708,284 | 0.004997 | 21,713,399 | - | - | 22,519,694 | (1,708,284) | 806,296 | (901,988) | -3.9% |
| 15 | Juab | 8,920 | 0.006535 | 1,238,264 | - | - | 1,284,245 | (8,920) | 45,981 | 37,061 | 3.0% |
| 16 | Kane | 5,406 | 0.003484 | 1,897,047 | - | - | 1,967,492 | (5,406) | 70,444 | 65,038 | 3.4% |
| 17 | Millard | 2,973 | 0.004449 | 3,399,808 | - | - | 3,526,055 | (2,973) | 126,247 | 123,274 | 3.6% |
| 18 | Morgan | 5,649 | 0.006270 | 1,430,914 | - | - | 1,484,049 | (5,649) | 53,135 | 47,486 | 3.3% |
| 19 | Nebo | 533,562 | 0.007991 | 9,484,371 | - | - | 9,836,559 | (533,562) | 352,188 | (181,373) | -1.8% |
| 20 | North Sanpete | 16,068 | 0.006067 | 1,041,862 | - | - | 1,080,550 | (16,068) | 38,688 | 22,620 | 2.1% |
| 21 | North Summit | 7,028 | 0.004874 | 1,505,886 | - | - | 1,561,804 | (7,028) | 55,919 | 48,891 | 3.2% |
| 22 | Park City | 127,040 | 0.003095 | 17,501,148 | - | - | 18,151,027 | (127,040) | 649,880 | 522,840 | 3.0% |
| 23 | Piute | 1,083 | 0.005116 | 186,835 | - | - | 193,773 | (1,083) | 6,938 | 5,855 | 3.1% |
| 24 | Rich | 811 | 0.003419 | 1,239,224 | - | - | 1,285,240 | (811) | 46,017 | 45,206 | 3.6% |
| 25 | San Juan | 6,217 | 0.006316 | 1,459,867 | - | - | 1,514,077 | (6,217) | 54,210 | 47,993 | 3.3% |
| 26 | Sevier | 10,535 | 0.004992 | 2,327,887 | - | - | 2,414,330 | (10,535) | 86,443 | 75,907 | 3.2% |
| 27 | South Sanpete | 13,828 | 0.007790 | 863,974 | - | - | 896,056 | (13,828) | 32,082 | 18,255 | 2.1% |
| 28 | South Summit | 17,029 | 0.005217 | 2,417,135 | - | - | 2,506,891 | (17,029) | 89,757 | 72,728 | 3.0% |
| 29 | Tintic | - | 0.006161 | 84,683 | - | - | 87,827 | - | 3,145 | 3,145 | 3.7% |
| 30 | Tooele | 108,122 | 0.008058 | 4,917,649 | - | - | 5,100,259 | (108,122) | 182,610 | 74,488 | 1.5% |
| 31 | Uintah | 33,517 | 0.004726 | 8,453,025 | - | - | 8,766,916 | (33,517) | 313,891 | 280,374 | 3.3% |
| 32 | Wasatch | 98,118 | 0.006075 | 6,134,789 | - | - | 6,362,596 | (98,118) | 227,806 | 129,688 | 2.1% |
| 33 | Washington | 787,770 | 0.006009 | 17,675,768 | - | - | 18,332,132 | (787,770) | 656,364 | (131,406) | -0.7% |
| 34 | Wayne | 1,562 | 0.002212 | 491,694 | - | - | 509,953 | (1,562) | 18,258 | 16,696 | 3.4% |
| 35 | Weber | 534,299 | 0.005385 | 12,615,263 | - | - | 13,083,712 | (534,299) | 468,449 | (65,850) | -0.5% |
| 36 | Salt Lake | 691,693 | 0.004516 | 27,479,103 | - | - | 28,499,499 | (691,693) | 1,020,397 | 328,704 | 1.2% |
| 37 | Ogden | 379,206 | 0.007219 | 5,137,072 | - | - | 5,327,830 | (379,206) | 190,758 | (188,449) | -3.4% |
| 38 | Provo | 330,037 | 0.005559 | 7,139,499 | - | - | 7,404,614 | (330,037) | 265,115 | (64,922) | -0.9% |
| 39 | Logan | 217,320 | 0.006573 | 3,356,049 | - | - | 3,480,671 | (217,320) | 124,622 | (92,698) | -2.6% |
| 40 | Murray | 35,409 | 0.004868 | 4,546,954 | - | - | 4,715,798 | (35,409) | 168,845 | 133,435 | 2.9% |
| 41 | Canyons | 752,780 | 0.004881 | 24,447,462 | - | - | 25,355,283 | (752,780) | 907,821 | 155,041 | 0.6% |

**419 Board Task Force**
**October 7, 2014 Agenda Item 2**
**K-12 Formulas**

| | | Charters | Districts | Statewide |
|---|---|---|---|---|
| A. | All LEAs funded on higher of PY ADM, PYADM plus Growth, or CY FE | $ (53,817) | $ 64,350,490 | $ 64,296,673 |
| B. | Sunset of 53A-17a-513(3)(b)<br>All LEAs funded on higher of PY ADM or PYADM plus Growth | $ (3,833,854) | $ 52,322 | $ (3,781,532) |
| C. | Codify Current K-12 Model | $ - | $ - | $ - |
| D. | Delay Sunset of Current K-12 Model | $ - | $ - | $ - |

**Scenario XII: Local Replacement Funds Less than Average and State Board Levy**

| | | Oct 1, 2012 Enrollment | Percent of State | LRF Per Pupil | LRF Less Than Average | FY14 Current LRF Contribution | Basic Levy Rate | Basic Levy Yield | Scenario XII Basic Rate Change: Levy Yield | Levy Rate | Net |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Statewide: | 612,551 | 100.0% | $ 1,081 | $ 14,618 | $ 7,292,181 | 0.001535 | $ 306,814,191 | $ 7,395,521 | 0.000037 | $ (103,340) |
| 1 | Alpine | 72,419 | 11.8% | $ 632 | $ 632 | $ 1,241,098 | 0.001535 | $ 25,446,597 | $ 613,371 | 0.000037 | $ 627,727 |
| 2 | Beaver | 1,579 | 0.3% | 1,864 | - | - | 0.001535 | 1,874,027 | 45,172 | 0.000037 | (45,172) |
| 3 | Box Elder | 11,131 | 1.8% | 1,235 | - | - | 0.001535 | 5,515,946 | 132,958 | 0.000037 | (132,958) |
| 4 | Cache | 16,038 | 2.6% | 595 | 595 | 212,302 | 0.001535 | 6,076,079 | 146,459 | 0.000037 | 65,843 |
| 5 | Carbon | 3,369 | 0.5% | 1,992 | - | - | 0.001535 | 3,219,558 | 77,605 | 0.000037 | (77,605) |
| 6 | Daggett | 194 | 0.0% | 1,819 | - | - | 0.001535 | 434,261 | 10,468 | 0.000037 | (10,468) |
| 7 | Davis | 68,573 | 11.2% | 907 | 907 | 1,440,839 | 0.001535 | 26,136,922 | 630,010 | 0.000037 | 810,829 |
| 8 | Duchesne | 5,021 | 0.8% | 2,326 | - | - | 0.001535 | 3,940,836 | 94,991 | 0.000037 | (94,991) |
| 9 | Emery | 2,310 | 0.4% | 2,754 | - | - | 0.001535 | 3,201,550 | 77,171 | 0.000037 | (77,171) |
| 10 | Garfield | 930 | 0.2% | 1,069 | 1,069 | 4,809 | 0.001535 | 1,186,426 | 28,598 | 0.000037 | (23,789) |
| 11 | Grand | 1,455 | 0.2% | 1,340 | - | - | 0.001535 | 2,321,555 | 55,959 | 0.000037 | (55,959) |
| 12 | Granite | 68,106 | 11.1% | 984 | 984 | 1,500,938 | 0.001535 | 32,736,812 | 789,096 | 0.000037 | 711,842 |
| 13 | Iron | 8,685 | 1.4% | 851 | 851 | 170,473 | 0.001535 | 4,536,991 | 109,361 | 0.000037 | 61,113 |
| 14 | Jordan | 52,855 | 8.6% | 1,313 | - | - | 0.001535 | 21,713,399 | 523,385 | 0.000037 | (523,385) |
| 15 | Juab | 2,287 | 0.4% | 1,223 | - | - | 0.001535 | 1,238,264 | 29,847 | 0.000037 | (29,847) |
| 16 | Kane | 1,212 | 0.2% | 2,037 | - | - | 0.001535 | 1,897,047 | 45,727 | 0.000037 | (45,727) |
| 17 | Millard | 2,841 | 0.5% | 2,817 | - | - | 0.001535 | 3,399,808 | 81,950 | 0.000037 | (81,950) |
| 18 | Morgan | 2,632 | 0.4% | 337 | 337 | 5,649 | 0.001535 | 1,430,914 | 34,491 | 0.000037 | (28,842) |
| 19 | Nebo | 31,230 | 5.1% | 612 | 612 | 533,562 | 0.001535 | 9,484,371 | 228,613 | 0.000037 | 304,948 |
| 20 | North Sanpete | 2,408 | 0.4% | 959 | 959 | 16,068 | 0.001535 | 1,041,862 | 25,113 | 0.000037 | (9,045) |
| 21 | North Summit | 990 | 0.2% | 3,261 | - | - | 0.001535 | 1,505,886 | 36,298 | 0.000037 | (36,298) |
| 22 | Park City | 4,630 | 0.8% | 5,037 | - | - | 0.001535 | 17,501,148 | 421,852 | 0.000037 | (421,852) |
| 23 | Piute | 304 | 0.0% | 619 | 619 | 1,083 | 0.001535 | 186,835 | 4,504 | 0.000037 | (3,420) |
| 24 | Rich | 479 | 0.1% | 3,789 | - | - | 0.001535 | 1,239,224 | 29,871 | 0.000037 | (29,871) |
| 25 | San Juan | 3,020 | 0.5% | 1,970 | - | - | 0.001535 | 1,459,867 | 35,189 | 0.000037 | (35,189) |
| 26 | Sevier | 4,585 | 0.7% | 936 | 936 | 10,535 | 0.001535 | 2,327,887 | 56,112 | 0.000037 | (45,576) |
| 27 | South Sanpete | 3,162 | 0.5% | 737 | 737 | 13,828 | 0.001535 | 863,974 | 20,825 | 0.000037 | (6,998) |
| 28 | South Summit | 1,495 | 0.2% | 4,140 | - | - | 0.001535 | 2,417,135 | 58,263 | 0.000037 | (58,263) |
| 29 | Tintic | 250 | 0.0% | - | - | - | 0.001535 | 84,683 | 2,041 | 0.000037 | (2,041) |
| 30 | Tooele | 14,107 | 2.3% | 499 | 499 | 108,122 | 0.001535 | 4,917,649 | 118,536 | 0.000037 | (10,414) |
| 31 | Uintah | 7,591 | 1.2% | 2,389 | - | - | 0.001535 | 8,453,025 | 203,754 | 0.000037 | (203,754) |
| 32 | Wasatch | 5,786 | 0.9% | 2,545 | - | - | 0.001535 | 6,134,789 | 147,874 | 0.000037 | (147,874) |
| 33 | Washington | 27,099 | 4.4% | 1,066 | 1,066 | 787,770 | 0.001535 | 17,675,768 | 426,061 | 0.000037 | 361,709 |
| 34 | Wayne | 501 | 0.1% | 1,041 | 1,041 | 1,562 | 0.001535 | 491,694 | 11,852 | 0.000037 | (10,290) |
| 35 | Weber | 31,028 | 5.1% | 845 | 845 | 534,299 | 0.001535 | 12,615,263 | 304,081 | 0.000037 | 230,218 |
| 36 | Salt Lake | 23,965 | 3.9% | 1,834 | - | - | 0.001535 | 27,479,103 | 662,363 | 0.000037 | (662,363) |
| 37 | Ogden | 12,489 | 2.0% | 952 | 952 | 379,206 | 0.001535 | 5,137,072 | 123,825 | 0.000037 | 255,381 |
| 38 | Provo | 14,799 | 2.4% | 975 | 975 | 330,037 | 0.001535 | 7,139,499 | 172,092 | 0.000037 | 157,945 |
| 39 | Logan | 5,987 | 1.0% | 1,378 | - | - | 0.001535 | 3,356,049 | 80,895 | 0.000037 | (80,895) |
| 40 | Murray | 6,435 | 1.1% | 1,477 | - | - | 0.001535 | 4,546,954 | 109,601 | 0.000037 | (109,601) |
| 41 | Canyons | 33,674 | 5.5% | 1,798 | - | - | 0.001535 | 24,447,462 | 589,287 | 0.000037 | (589,287) |

***Effective 5/13/2014***

**53A-1a-515 Charters authorized by local school boards -- Application process -- Local school board responsibilities.**

(1)

(a) An applicant identified in Section 53A-1a-504 may submit an application to a local school board to establish and operate a charter school within the geographical boundaries of the school district administered by the local school board.

(b)

(i) The principal, teachers, or parents of students at an existing public school may submit an application to the local school board to convert the school or a portion of the school to charter status.

(A) If the entire school is applying for charter status, at least two-thirds of the licensed educators employed at the school and at least two-thirds of the parents or guardians of students enrolled at the school must have signed a petition approving the application prior to its submission to the charter school authorizer.

(B) If only a portion of the school is applying for charter status, the percentage is reduced to a simple majority.

(ii) The local school board may not approve an application submitted under Subsection (1)(b)(i) unless the local school board determines that:

(A) students opting not to attend the proposed converted school would have access to a comparable public education alternative; and

(B) current teachers who choose not to teach at the converted charter school or who are not retained by the school at the time of its conversion would receive a first preference for transfer to open teaching positions for which they qualify within the school district, and, if no positions are open, contract provisions or board policy regarding reduction in staff would apply.

(2)

(a) An existing public school that converts to charter status under a charter granted by a local school board may:

(i) continue to receive the same services from the school district that it received prior to its conversion; or

(ii) contract out for some or all of those services with other public or private providers.

(b) Any other charter school authorized by a local school board may contract with the board to receive some or all of the services referred to in Subsection (3)(a).

(c) Except as specified in a charter agreement, local school board assets do not transfer to an existing public school that converts to charter status under a charter granted by a local school board under this section.

(3)

(a)

(i) A public school that converts to a charter school under a charter granted by a local school board shall receive funding:

(A) through the school district; and

(B) on the same basis as it did prior to its conversion to a charter school.

(ii) The school may also receive federal money designated for charter schools under any federal program.

(b)

(i) A local school board-authorized charter school operating in a facility owned by the school district and not paying reasonable rent to the school district shall receive funding:

(A) through the school district; and
(B) on the same basis that other district schools receive funding.
(ii) The school may also receive federal money designated for charter schools under any federal program.
(c) Subject to the provisions in Section 53A-1a-502.5, a charter school authorized by a local school board shall receive funding as provided in Section 53A-1a-513.
(d)
(i) A charter school authorized by a local school board, but not described in Subsection (3)(a), (b), or (c) shall receive funding:
(A) through the school district; and
(B) on the same basis that other district schools receive funding.
(ii) The school may also receive federal money designated for charter schools under any federal program.
(4)
(a) A local school board that receives an application for a charter school under this section shall, within 45 days, either accept or reject the application.
(b) If the board rejects the application, it shall notify the applicant in writing of the reason for the rejection.
(c) The applicant may submit a revised application for reconsideration by the board.
(d) If the local school board refuses to authorize the applicant, the applicant may seek a charter from the State Charter School Board under Section 53A-1a-505.
(5) The State Board of Education shall make a rule providing for a timeline for the opening of a charter school following the approval of a charter school application by a local school board.
(6) After approval of a charter school application and in accordance with Section 53A-1a-508, the applicant and the local school board shall set forth the terms and conditions for the operation of the charter school in a written charter agreement.
(7) A local school board shall:
(a) annually review and evaluate the performance of charter schools authorized by the local school board and hold the schools accountable for their performance;
(b) monitor charter schools authorized by the local school board for compliance with federal and state laws, rules, and regulations; and
(c) provide technical support to charter schools authorized by the local school board to assist them in understanding and performing their charter obligations.
(8) A local school board may terminate a charter school it authorizes as provided in Sections 53A-1a-509 and 53A-1a-510.
(9) In addition to the exemptions described in Sections 53A-1a-511 and 53A-1a-512, a charter school authorized by a local school board is:
(a) not required to separately submit a report or information required under this title to the State Board of Education if the information is included in a report or information that is submitted by the local school board or school district; and
(b) exempt from the requirement under Section 53A-1a-507 that a charter school shall be organized and managed under Title 16, Chapter 6a, Utah Revised Nonprofit Corporation Act.
(10) Before a local school board accepts a charter school application, the local school board shall, in accordance with State Board of Education rules, establish and make public the local school board's:
(a) application requirements, in accordance with Section 53A-1a-504;
(b) application process, including timelines, in accordance with this section; and
(c) minimum academic, financial, and enrollment standards.

Amended by Chapter 363, 2014 General Session

# Charter School Finance

*By Yilan Shen and Alexander Berger*

*February 2011*

Charter schools are growing rapidly nationwide. Since the first charter school law passed in Minnesota in 1991, forty states and the District of Columbia have passed laws allowing the publicly funded, privately managed and semi-autonomous schools of choice. Charter schools now educate more than 3 percent of all public school students, and the proportion of students enrolled continues to increase at more than 10 percent a year.[1]

As with traditional public schools, funding for charter schools varies significantly across states and districts.[2] The central question in most debates about charter school funding is the level of funding. Some claim it is unfair that charters receive less funding per pupil than traditional public schools, while others argue that the different nature of charter schools justify lower funding. (Funding for charter school facilities is addressed in a separate NCSL brief.)

## How Are Charter Schools Funded?

Charter schools are funded primarily by public money, similarly to the ways traditional public schools are funded. Public schools are funded by a combination of local and state funding; most local funds are raised through property taxes. This strategy historically has produced significant inequalities in the amount of funds available for school districts. Districts that contained less valuable real estate could not collect as much money through property taxes, even though their tax rates are sometimes significantly higher than wealthier districts. During the past 40 years, school finance reforms have shifted more of the funding burden onto states, which has resulted in funds being more equally distributed among districts.[3] Almost every state, however, continues to allow some variation in district revenue based on local property taxes, while allocating state funds to districts based on the number and characteristics of students enrolled.[4] The complex mix of state and local funding upon which traditional public schools rely explains some of the complexities in charters school funding.

As publicly funded schools, charter schools receive money for the students they enroll. When a student enrolls in a charter school, the money follows him or her from the resident school district. A main difference between char-

**Charter Schools in the States**

**Charter schools are publicly funded, privately managed and semi-autonomous schools of choice. They do not charge tuition. They must hold to the same academic accountability measures as traditional schools. They receive public funding similarly to traditional schools. However, they have more freedom over their budgets, staffing, curricula and other operations. In exchange for this freedom, they must deliver academic results and there must be enough community demand for them to remain open.**

**The number of charter schools has continued to grow since the first charter law was passed in Minnesota in 1991. Some have delivered great academic results, but others have closed because they did not deliver on promised results.**

**Because state laws enable and govern charter schools, state legislatures are important to ensuring their quality.**

**This series provides information about charter schools and state policy topics, including finance, authorization, limits to expansion, teaching, facilities and student achievement.**

ter schools and traditional schools is that charters are granted budgetary autonomy in exchange for educational results. Defenders of traditional public schools are concerned that charter schools are taking money away from those schools. Simply having one less student does not proportionally decrease the burden on a district. It likely still needs the same number of teachers, other staff, the same facilities and the same instructional materials. However, losing students to a charter school or another traditional school have the same effects and traditional schools have always had to adjust to enrollment changes.

If a student transfers from a traditional public school to a charter school, advocates argue the full amount of money that would have been spent for that student at the traditional public school should move to the charter school. Charter advocates hold that districts receive funds to educate a certain number of students. When that number declines, it makes sense that their funding also should decline.

To give districts time to adjust to decreasing funding, some states have adopted "hold harmless" provisions. Allocating additional funds to districts that lose students to charter schools helps them adjust to lower funding levels. Massachusetts, for instance, provides extra funds to a district that loses a student to a charter school for six years, gradually decreasing the funding during that time. Over the six year period after a student moves to a charter school, the district will have received a total of more than twice the state's annual per-pupil contribution.[5] These types of provisions soften the effects of losing per-pupil revenue on traditional school districts. However, charter schools were originally envisioned to be drivers of competition. If the goal is to follow the original charter concept, some argue these provisions may dampen true competition.

## Types of Charter Funding

Although charter schools in every state are funded based on the number of pupils they enroll, the amount of per-pupil funding for charter schools can vary significantly within and across states. States have shaped three different types of funding formulas for charter schools—based on the student's resident district, the authorizer or the statewide formula.[6]

One strategy funds charter schools based on the per-pupil revenue of districts in which their students reside. It is used in eight states. These states require districts to pass along a portion of both state and local funds.[7] Because each student brings a portion of home district spending, a charter school could receive different amounts of money for different students. Conversely, the same amount of public funding will follow a student wherever he or she decides to enroll in a charter school. Thus, a student whose parents and neighbors are taxed at high local rates can carry a larger amount of funds anywhere in the state.

The second type of formula is based on the per-pupil revenue of the authorizer. It is the most common formula as it is used in 29 states. In most cases, because authorizers are traditional school districts, this strategy is similar to the first. It diverges, however, when students attend charter schools outside their home district or when charter schools are authorized by non-district entities. For example, the authorizer can be an institution of higher education. Under this formula, charter schools receive money based on the authorizing district's revenue. Colorado uses a variant of this approach to fund its charter schools. It requires school district authorizers to pass on to charter schools 100 percent of their per-pupil revenues, except for up to 5 percent that is spent on administrative costs associated with authorizing the charter school. If the authorizer is the Colorado Charter Institute, a non-district authorizer, the charter school receives the same amount of funding as the district where it is located. Colorado al

lows districts to raise more money by overriding certain local property tax limits, but does not require the resulting funds to be distributed to charter schools within a district. Thus, charter schools, on average, have 15 percent less revenue per-pupil than traditional public schools.[8]

The third formula uses a statewide per-pupil allocation. Used in five states and the District of Columbia, it provides charter schools the same funding wherever they are located within the state and wherever their students reside. Minnesota uses this formula and funds charter schools at almost exactly the district level when statewide averages are compared. However, when individual charter schools are compared with their district counterparts, it is estimated a Minnesota charter school receives about 13 percent less revenue per-pupil than the district in which it is located.[9] One reason for this disparity is charter schools in Minnesota are disproportionately located in urban districts that have large property tax bases and, therefore, high local revenues. Some advocates are concerned that the average charter school is still at a disadvantage in these cases, despite efforts written in law to fund charter schools more equitably.

## Tradeoffs

Each of the charter school funding strategies comes with tradeoffs. By funding a student's charter school based on his or her home district's revenue, a state creates an incentive for charter schools to draw students from a high-revenue district. Similarly, by funding a student's charter school based on the district that authorizes the charter, a state creates an incentive for charter schools to be authorized by a high-revenue district. However, such funding mechanisms also ensure that the amount of money available to educate a student is comparable, whether at a traditional or charter school. By using a statewide per-pupil allocation, a state decreases incentives for charter schools to serve students in high revenue and high need urban districts. The charter schools in those districts would be receiving the average per-pupil funding in the state. That average is still less than the funding received by traditional counterparts with higher than average funding. Also, it might be less than what is needed to educate disadvantaged students. This type of funding mechanism results in different amounts of money available for a student's education based on whether he or she chooses a charter or traditional public school.

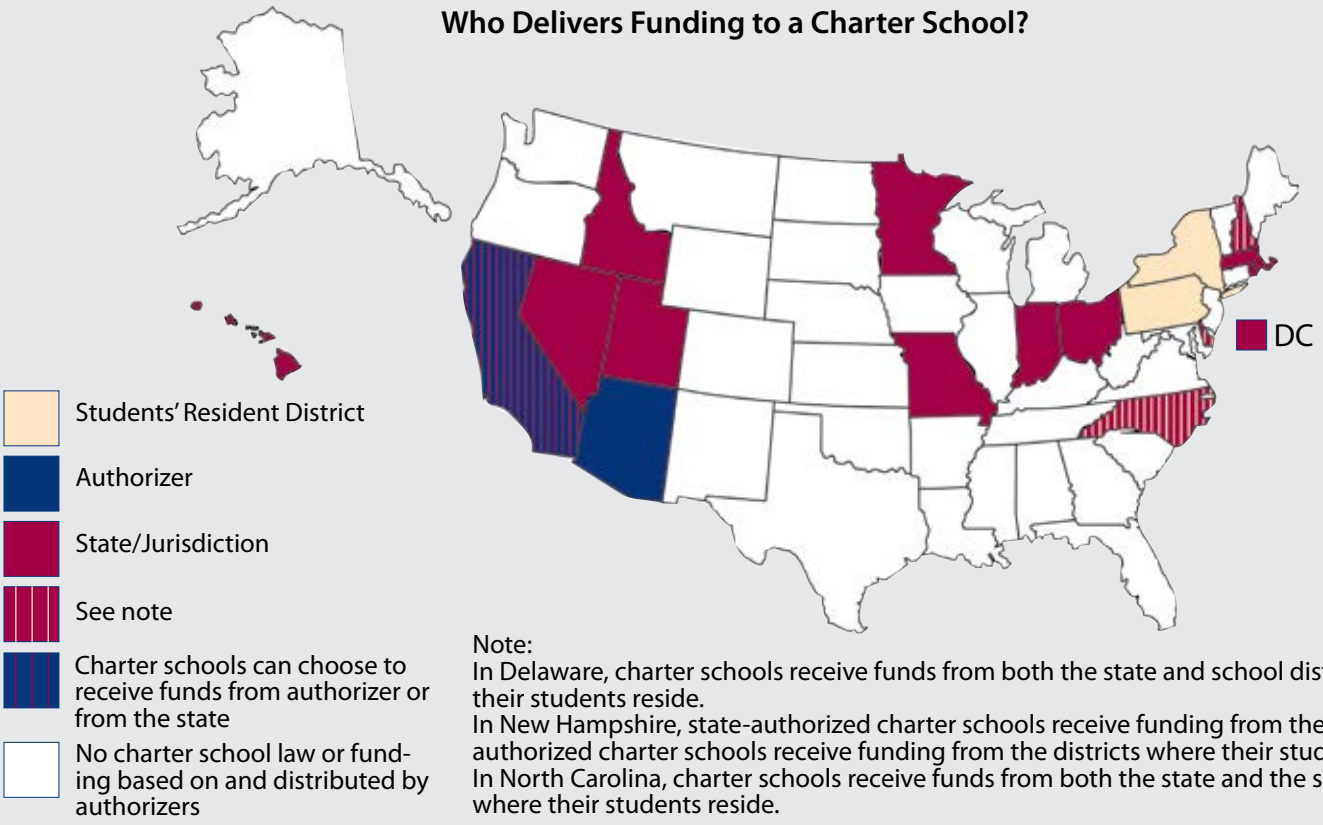
**What Is the Basis for Charter School Funding?**

| Students' Resident District | Authorizer* | Single Statewide Formula |
|---|---|---|
| Delaware<br>Massachusetts<br>New Hampshire**<br>New York<br>North Carolina***<br>Ohio<br>Pennsylvania<br>Rhode Island | California<br>Indiana<br>Missouri<br>Nevada<br>North Carolina***<br>Utah | Arizona<br>Hawaii<br>Idaho<br>Minnesota<br>New Hampshire**<br>Washington, D.C. |

States without a charter school law (10) and states in which funding is both based on and distributed by authorizers (23) are excluded.
* Includes states where funding for a charter school is part of the contract with an authorizer, rather than set forth explicitly in state law.
** In New Hampshire, district-authorized charter schools receive funds based on their students' district of residence, while state-authorized charters receive funds based on a single statewide formula.
*** In North Carolina, charter schools receive state funding based on their authorizer, along with local funding based on the districts where their students live.

**Source:** NCSL analysis based on Batdorff, Maloney and May, 2010, and state charter school laws.

**Who Delivers Funding to a Charter School?**




Note:
In Delaware, charter schools receive funds from both the state and school districts where their students reside.
In New Hampshire, state-authorized charter schools receive funding from the state; district-authorized charter schools receive funding from the districts where their students reside.
In North Carolina, charter schools receive funds from both the state and the school districts where their students reside.

**Source:** NCSL analysis based on Batdorff, Maloney and May, 2010, and state charter school laws.

Research on the responsiveness of charter schools to fiscal incentives has primarily focused on those managed by for-profit education management organizations, so it is difficult to judge the extent to which these incentives should be cause for concern. There is some indication that for-profit managed charter schools react to incentives to serve cheaper-to-educate student populations, while other types of charter schools tend to be motivated by other concerns, such as student need.[10] So long as states continue to permit some districts to spend more per-pupil than others, they have no choice but to allow either different funding for some students based on whether they attend charter schools or different funding for charter schools based on the areas from which they draw their students.

## Charter School and Traditional Public School Funding

A basic question about charter school funding is how funding levels for charter schools compare with traditional public schools. While accurate comparisons are difficult because of insufficient data and complexities of school finance, there is a growing body of knowledge about the topic. Research generally indicates that charter schools receive less public money than traditional schools. A recent Ball State University study analyzed funding of charter schools in 24 states and found an average difference of 19 percent, which amounts to about $2,247 per pupil.[11] Existing research points to some possible reasons for this disparity.

1. Fixed per-pupil costs—such as facilities and instructional materials—are not as easily transferred with the student when the per-pupil funding follows the student to the charter school. For example, the cost to maintain a building would be relatively the same, regardless of the number of students who leave.

2. Schools have different funding needs, depending on student population. Student characteristics such as economic disadvantage and disabilities require more funding to meet educational needs. Some charter schools serve more students with high-need characteristics than their traditional counterparts; others serve less. Ball State University researchers concluded the number of poor students served could not account for all the existing disparity in funding, nor can other possible differences in population such as special education students served or how charter schools configured grade levels.[12] In other words, the average lower per-pupil funding of charter schools was not due to the fact that they served students with fewer needs.

3. Most charter schools do not have legal obligations to provide some costly services such as lunch and transportation. Researchers at Western Michigan University studied spending differences between charter and traditional schools across the country and found the cost of services such as lunch and transportation resulted in lower costs at charter schools.[13]

4. Some charter schools simply operate more efficiently than traditional schools.[14] After all, the original vision of charter schools included more autonomy and efficient operations.

Charter schools generally receive less public funding under state laws. Education stakeholders differ on whether charter schools should receive less public funding than traditional schools. Some argue charter schools should receive funding equal to that of their traditional counterparts because the disparity is keeping charter schools from achieving their full potential. Others argue charter schools take unfair shares of existing resources from traditional schools. Those who want to see more charter school expansion believe the disparity in funding is an outdated practice, since charter schools have shown some promise and are expanding rapidly. Others believe charter schools need less money because they have more autonomy over how to spend it and more private fundraising opportunities.[15] Charter schools do have funding opportunities from grants, fundraising and activities that generate income. At the same time, traditional schools have additional opportunities to raise money through local school foundations, grants and other income-generating activities as well.

## Conclusion

As they review charter school funding policies, state legislatures face a series of difficult choices. Each of the funding formulas used so far comes with distinct tradeoffs. Considering these choices, legislators may want to seek answers to the following questions.

- What type of funding formula is used for charter schools? How do they receive funding?
- How does the charter funding formula compare to the traditional public school formula?
- How large is the gap in per-pupil revenue between charter and traditional public schools? Is the gap in state, local or other stream of funding? Does it vary in size around the state?
- What type of students do charter schools serve? In which areas of the state are they located?
- Do charter schools provide full special education, transportation and food services?
- How do charter schools in the state perform relative to traditional public schools?

# Notes


1. National Alliance for Public Charter Schools, "Public Charter School Dashboard," (Washington, D.C.: NAPCS, 2010); http://www.publiccharters.org/dashboard/students/page/overview/year/2010.

2. Sheila E. Murray, William N. Evans and Robert M. Schwab, "Education-Finance Reform and the Distribution of Education Resources," *American Economic Review* 88, no. 4 (September 1998): 789-812.

3. Ibid., 791-795.

4. Deborah A. Verstegen and Teresa S. Jordan, "A Fifty-State Survey of School Finance Policies and Programs: An Overview," *Journal of Education Finance* 34, no. 3 (Winter 2009): 213-230.

5. Meagan Batdorff, "Massachussets," in *Charter School Funding: Inequity Persists*, ed. Meagan Batdorff, Larry Maloney and Jay May (Muncie, Ind.: Ball State University, 2010), 111-120; http://www.bsu.edu/teachers/ocsr/funding/.

6. National Alliance for Public Charter Schools, *A New Model Law for Supporting the Growth of High-Quality Public Charter Schools* (Washington, D.C.: NAPCS, 2009), 22; http://www.publiccharters.org/files/publications/ModelLaw_P7-wCVR.pdf.

7. Larry Maloney, "New York," in *Charter School Funding: Inequity Persists*, ed. Batdorff, Maloney and May, 152-159; http://www.bsu.edu/teachers/ocsr/funding/.

8. Jay F. May, "Colorado," in *Charter School Funding: Inequity Persists*, ed. Batdorff, Maloney and May, 45-51; http://www.bsu.edu/teachers/ocsr/funding/.

9. Larry Maloney, "Minnesota," in *Charter School Funding: Inequity Persists* by Batdorff, Maloney and May, 126-130; http://www.bsu.edu/teachers/ocsr/fundng/.

10. David R. Garcia, Rebecca Barber and Alex Molnar, "Profiting from Public Education: Education Management Organizations and Student Achievement," *Teachers College Record* 111, no. 5 (2009): 1352-1379; Natalie Lacireno-Paquet et al., "Creaming Versus Cropping: Charter School Enrollment Practices in Response to Market Incentives," *Educational Evaluation and Policy Analysis* 24, no. 2 (June 20, 2002): 145-158.

11. Meagan Batdorff , Larry Maloney and Jay May, with Daniela Doyle and Bryan Hassel, *Charter School Funding: Inequity Persists* (Muncie, Ind.: Ball State University, 2010), 1. To calculate the gap for each state and Washington, D.C., the researchers weighted traditional district revenue by the number of charter school students within the district and compared it with the average of charter school revenues from around the state. This gave more weight in calculating the traditional revenue figure to high-revenue (urban) districts where charter schools tend to be clustered, producing a higher figure for the funding gap between charter and traditional public schools. http://www.bsu.edu/teachers/media/pdf/charterschfunding051710.pdf.

12. Ibid., 7-9.

13. Gary Miron and Jessica L. Urschel, *Equal or Fair? A Study of Revenues and Expenditure in American Charter Schools* (Boulder, Colo.: Education and the Public Interest Center, 2010), 29. http://www.epicpolicy.org/publication/charter-school-finance.

14. Shawna Gosskopf, Kathy J. Hayes and Lori L. Taylor, "The Relative Efficiency of Charter Schools," *Annals of Public and Cooperative Economics* 80, no. 1 (2009): 67-87.

15. National Education Association, *Charter Schools: Proceed Deliberately, Monitor Diligently, and Learn What Can Be Scaled Up* (Washington, D.C.: NEA, 2008), 2.



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Yilan Shen collaborated with Alexander Berger to write this brief. Yilan, a policy specialist in the NCSL Education Program, focuses on charter schools. Alexander Berger was an intern at NCSL and currently is completing his studies at Stanford University.

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**DISCUSSION/ ACTION:** Training on Finance and Audit Items

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**Background:**
Board member have requested receiving more training on finance and audit items.

**Key Points:**
Staff have prepared suggestions for training the Board on areas pertaining to finance and auditing.

**Anticipated Action:**
The Finance Committee and Board will review the proposed list and identify areas for which they would like to receive training.

**Contact:** Bruce Williams, 801-538-7514
Debbie Davis, 801-538-7639

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

**School Finance Training Topics (30 minutes each)**

The initial plan is for each class to take 30 minutes.

1. What is the minimum school program and what is the WPU?
    a. Discuss of Equity
    b. Discuss Growth

2. What revenue sources pay for education
    a. State Basic Levy
    b. Local property taxes
    c. Voted and Board levies
    d. Balance the MSP using state and local revenues
    e. Recapture

3. What data sets are used in the various calculations (ADM, OCT 1, special education counts, district of residence)

4. Basic program calculations (Above the Line)
    a. K-12
    b. NESS
    c. Prostaff
    d. District Admin Costs

5. Restricted Basic Programs (Above the line)
    a. Special Education Add On
    b. Special Education Self-Contained
    c. Special Education Preschool
    d. Special Education Extended Year
    e. Special Education State Programs (Impact Aid, High Cost Pool, Prison, Extended year Stipends)
    f. CTE Add on
    g. Class Size

6. Related to Basic Programs (Below the line)
    a. To/From Pupil Transportation
    b. Transportation Guarantee Levy
    c. Flexible Allocation

7. Special Populations (probably an hour session) (Below the line)
    a. Enhancement for At Risk Students/Gang Prevention
    b. Youth in Custody

c. Adult Education
d. Enhance for Accelerated Students (Gifted and Talented, Advanced Placement, International Baccalaureate)
e. Concurrent Enrollment
f. Title I Schools in Improvement –paraeducators

8. Other Programs (Below the line) (probably two one hour sessions)
    a. SchoolLAND Trust
    b. Charter School Local Replacement
    c. Charter School Admin Costs
    d. K-3 Reading Improvement Program
    e. Educator Salary Adjustments
    f. Teacher Salary Supplement Program
    g. Library Books and Electronic resource
    h. School Nurses
    i. Critical Languages/Dual Immersion
    j. USTAR
    k. Early Intervention –extended day kindergarten
    l. Beverly Taylor Sorenson Arts Learning
    m. Teacher Supply Money
    n. Special Education Intensive Services
    o. UPASS

9. District Voted and Board Levies and associated Guarantee Programs

10. District Capital Outlay Programs

11. Budgetary process for the legislative session
    a. Projection of student counts (growth )
    b. Projection of local tax revenues

12. How the MSP is calculated and paid to LEAs

13. Statewide Online Education program
    a. How it works
    b. How it interacts with the MSP

14. Federal Funds
    a. Award process
    b. Reimbursement process
    c. Monitoring process

(You could probably do a session for each federal program we have)

15. National School Lunch Program
    a. Federal programs
    b. Liquor tax

16. Reporting
    a. Financial Statement Audits
    b. Single Audits
    c. Legal compliance Guide reviews
    d. Annual Financial Reports
    e. Annual Program Reports

17. Redevelopment Agencies (RDAs)

18. Bonding by School Districts

19. Requirements for Pupil Transportation

20. School Construction Requirements

# Potential Training Topics for the Board/Audit Committee

| # | Topics | Potential Provider | Estimated Schedule |
|---|---|---|---|
| 1 | Opening Conference/Training by OSA on: | OSA | Audit started in March |
| | a Mgt/Board/Audit Responsibilities for State Audit | | |
| | b Audit Reports/Opinions (CAFR/Single Audit) | | |
| | i. Types of findings | | |
| 2 | Internal Audit Governing Regs | Int. Audit | |
| | a Utah Code | | |
| | b Board Rule | | |
| | c Internal Audit Charter | | |
| | i. Annual risk assessment | | |
| | ii. Annual audit plan (priorities) | | |
| | iii. Assurance vs Consulting projects | | |
| 3 | Internal Audit Process | | |
| | a Opening conference/engagement letter | Int. Audit | |
| | b Fieldwork | | |
| | c Reporting | | |
| | i. Protected Documents | | |
| 4 | Board Governance | Int. Audit/Other | |
| | a Enterprise Risk Management | | |
| | b Liability | | |
| | c Role Clarity | | |
| 5 | Financial Reporting System | Int. Acctg/State Finance | |
| | a FINET and BASE - general use/background | | |
| | b System Internal Controls | | |
| | c Reports in FINET and BASE | | |
| | d Chart of Accounts | | |
| | e Budget process - after appropriations through SFY closeout | | |
| 6 | Federal Program Regulations - Uniform Guidance | Int Audit/Other | |
| | a Omni-Circular | | |
| | b EDGAR | | |
| 7 | Subrecipient Monitoring | Int Audit/Other | |
| | a Subaward Process | | |
| | b During-the-award Monitoring | | |
| | c Subrecipient Audit Reviews | | |

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Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**INFORMATION:** Budget and Accounting System Conversion

---

**Background:**
The Utah State Office of Education is beginning the process of converting its budget and accounting system from its current system—BASE (Budget and Accounting System for Education), to FINET, the system used by the State of Utah.

**Key Points:**
Staff will provide a progress report on the conversion from BASE to FINET and will report on needed resources to complete the conversion.

**Anticipated Action:**
The Committee will receive the progress report.

**Contact:** Bruce Williams, Associate Superintendent, 801-538-7514

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Brad C. Smith, Chief Executive Officer
Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**DISCUSSION/ ACTION:** Board Rules and Rule Changes Needed as a Result of Legislation

---

**Background:**
The 2015 General Session of the Legislature ended March 12, 2015. Many bills relating to education were passed during the session. It is necessary for the Board to develop new Board rules or make changes to existing rules to be consistent with the legislation passed.

**Key Points:**
Staff will provide a summary of education-related legislation passed during the 2015 Legislative Session and actions required by the Board as a result of that legislation.

**Anticipated Action:**
The Committee will review the list and give direction to staff regarding a timeline for rules to come to the Board and the changes required.

**Contact:** Brad Smith, 801-5387510
Sydnee Dickson, 801-538-7515
Angie Stallings, 801-538-7656

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| Bill Details | | | | Committee Assignment | | | |
|---|---|---|---|---|---|---|---|
| **NUMBER** | **BILL NAME** | **REP./SEN.** | **SUMMARY** | **Audit** | **Finance** | **S & A** | **L & L** |
| **HB0030** | Math Teacher Training Program Amendments | Edwards | Expands a program allowing a grant to be used to assist experienced math teachers to become teacher leaders. | | | | |
| **HB0033** | American Indian-Alaskan Native Education Amendments | Draxler | Provides for American Indian – Alaskan Native Education State Plan and establishes duties and reporting requirements. | | | | |
| **HB0105 S1** | Antidiscrimination Modifications | Miller | Adds pregnancy, childbirth, and breastfeeding to the Utah Antidiscrimination Act. | | | | |
| **HB0124 S1** | Education Background Check Amendments | Handy | Clarifies and amends background check provisions, requirements, and notifications for LEAs and individuals. | | | | |
| **HB0128** | Maintenance Of Student Records | Froerer | Amends provisions related to a record a school maintains to verify that a parent was notified of certain incidents or threats. | | | | |
| **HB0163** | Student Data Breach Requirements | Knotwell | Requires notification if personally-identifiable student data is breached. | | | | |
| **HB0174, HB0291S3, HB0409S1, SB0121S1** | Procurement Code Amendments | Stratton, Stuart, Snow, Mayne | Requires various modifications to procurement code. | | | | |
| **HB0197 S1** | Educator Licensing Amendments | Coleman | Requires the State Board of Education to make certain rules regarding administrative or supervisory licensing; and makes technical changes | | | | |
| **HB0198** | Strengthening College and Career Readiness | Arent | Creates a program to provide grants to local education agencies for professional development for school counselors. | | | | |
| **HB0203 S1** | Teacher Salary Supplement Program Amendments | Last | Amends provisions related to the Teacher Salary Supplement Program, including the amount of supplement and entity that distributes money for the program. | | | | |
| **HB0213 S2** | Safe Technology Utilization and Digital Citizenship in Public Schools | Stratton | Amends provisions related to educational technology and school community council and expands uses of School LAND Trust Program funds. | | | | |
| **HB0242** | State and Local Government Employee Policies | Miller | Enacts language related to the accommodation of public employees who are breastfeeding. | | | | |
| **HB0282 S1** | Online Education Program Amendments | Daw | Expands the entities that may offer secondary school level and concurrent enrollment courses through the Statewide Online Education Program and authorizes institutions within the state system of higher education to offer secondary school level and concurrent enrollment courses through the Statewide Online Education Program. | | | | |

| Bill Details | | | | Committee Assignment | | | |
|---|---|---|---|---|---|---|---|
| **NUMBER** | **BILL NAME** | **REP./SEN.** | **SUMMARY** | **Audit** | **Finance** | **S & A** | **L & L** |
| **HB0345 S2** | Education Abuse Policy | McCay | Modifies provisions related to school personnel employment and licensing procedures and student abuse reporting. (UPPAC). | | | | |
| **HB0360 S1** | Utah Education Amendments | Christensen | Enacts provisions related to statewide education policy; requires the State Board of Education to: generate a report regarding the history of the state public education system; create a 10-year plan; and report to the Education Interim Committee; removes nonvoting members from the State Board of Education and requires the Board to meet quarterly with certain individuals; amends provisions relating to academic standards established by the Board and curriculum in public schools; provides for education entities to meet certain requirements when establishing certain national programs or standard. | | | | |
| **SB0038** | Behavioral Testing And Tracking Restrictions | Osmond | Eliminates references to behavioral testing or tracking in public schools; and makes technical changes. | | | | |
| **SB0060 S2** | American Civics Education Initiative | Stephenson | Requires an individual to pass the basic civics test as a condition for receiving a high school diploma or adult education secondary diploma. | | | | |
| **SB0204 S2** | Parental Rights In Public Education Amendments | Osmond | Amends provisions related to certain rights of a parent or guardian of a student enrolled in a public school and provisions related to achievement tests. | | | | |
| **SB0235 S2** | School Turnaround and Leadership Development | Niederhauser | Enacts and amends provisions related to turning around low performing schools and developing school leaders. | | | | |
| **SB0245 S1** | School Grading Amendments | Millner | Exempts the USDB from school grading; requires the State Board of Education to annually evaluate the USDB in accordance with an accountability plan approved by the State Board; provides an alternative grade distribution for the 2014-15 school year only; amends provisions related to calculating student growth. | | | | |

UTAH STATE BOARD OF EDUCATION

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Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**INFORMATION:** Finance Committee Requests for Data

---

**Background:**
As an ongoing monthly item for the Finance Committee, an item will be included on the agenda for members of the committee to be able to request staff to provide data or analysis of financial issues under the oversight of the Board.

**Key Points:**
The Finance Committee will have the opportunity to discuss requests for data and analysis as well as realistic timelines for prioritizing and completing such requests.

**Anticipated Action:**
The Committee will take action to provide data requests to Associate Superintendent Williams for review in future committee meetings.

**Contact:** Bruce Williams, Associate Superintendent, 801-538-7514

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

**Law and Licensing Committee**
Basement West Conference Room

**ACTION:** R277-490 *Beverley Taylor Sorenson Arts Learning Program* (Amendment) — Tab 3-K

**ACTION:** Procedures for Distributing New Money for the Professional Outreach Program for the Schools — Tab 3-L

**ACTION:** Approval of New Charter School Applications for 2016-2017 School Year — Tab 3-M

**Time Certain: 6:00** - **DISCUSSION/ACTION:** USOE Chief Privacy Officer and HB 68 *Student Privacy Study* — Tab 3-N

**ACTION:** Charter Amendment Request from Freedom Preparatory Academy — Tab 3-O

**ACTION:** R277-520 *Appropriate Licensing and Assignment of Teachers* (Continuation and Amendment) — Tab 3-P

**ACTION:** R277-502 *Educator Licensing and Data Retention* (Amendment) — Tab 3-Q

**ACTION:** R277-410 *Accreditation of Schools* (Amendment and Continuation) — Tab 3-R

**ACTION:** R277-419-6 *Pupil Accounting–High School Completion Status* (Amendment) — Tab 3-S

**DISCUSSION:** Framework for R277-419-9 *Pupil Accounting - Provisions for Maintaining Student Membership and Enrollment Documentation and Documentation of Student Education Services Provided by Third Party Vendors* — Tab 3-T

**DISCUSSION/ACTION:** New Board Rules and Rule Changes Needed as a Result of Legislation — Tab 3-U

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** R277-490 *Beverley Taylor Sorenson Arts Learning Program* (Amendment)

---

**Background:**
In accordance with S. B. 75 *Elementary Arts Learning Program Amendments* (2015 General Session) and its affect on Utah State Code 53A-17a-162, changes are needed in Board Rule R277-490.

**Key Points:**
Recommended changes to R277-490 have been drafted for Board review. Those changes reflect the changes to legislation regarding the Beverley Taylor Sorenson Arts Learning Program. Changes in legislation allow LEAs more flexibility in use of grant money for elementary arts specialists in this program. The legislation also defines the roles of the USOE and the Beverley Taylor Sorenson endowed universities.

**Anticipated Action:**
The Law and Licensing Committee will consider approving R277-490 *Beverley Taylor Sorenson Arts Learning Program*, as amended, on first reading. If approved, the full Board will consider approving R277-490 on second reading.

**Contact:** Sydnee Dickson, 801-538-7515
Diana Suddreth, 801-538-7739
Cathy Jensen, 801-538-7793

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

**R277. Education, Administration.**

**R277-490. Beverley Taylor Sorenson Elementary Arts Learning Program (BTSALP).**

**R277-490-[~~2~~]1. Authority and Purpose.**

A. This rule is authorized by Utah Constitution Article X, Section 3 which vests general control and supervision of public education in the Board, Section 53A-1-401(3) which permits the Board to adopt rules in accordance with its responsibilities, and Section 53A-17a-162 which directs the Board to establish a grant program for LEAs to hire qualified arts professionals to encourage student participation in the arts in Utah public schools and embrace student learning in Core subject areas.

B. The purpose of this rule is:

(1) to implement the Beverley Taylor Sorenson Elementary Arts Learning Program model in public schools through LEAs and consortia that submit grant[~~s~~] applications to hire arts specialists [~~who are highly qualified~~]as defined in R277-490-2F and paid on the licensed teacher salary schedule;

(2) to distribute funds to[~~ arts specialists through~~] LEAs to purchase supplies and equipment as provided for in Section 53A-17a-162(4) and (6);

[~~(3) to allow ten Utah school districts/consortia to hire arts coordinators;~~]

([~~4~~]3) [~~to establish partnerships within established networks with Utah higher education institutions~~]to fund activities at endowed universities as defined in Section 53A-17a-162 to provide pre-service training, professional development, research and leadership for arts educators and arts education in Utah public schools; and

([~~5~~]4) appropriately monitor, evaluate and report programs and Program results.

**R277-490-[~~1~~]2. Definitions.**

A. “Arts equipment and supplies” means musical instruments, recording and play-back devices, cameras, projectors, computers to be used in the program, CDs, DVDs,

teacher reference books, and art-making supplies. This list is not exhaustive.

B. “Arts Program coordinators (coordinator)” means individuals, employed full-time, who are responsible to coordinate arts programs for the LEA (as defined in R277-490-[~~1~~]2G) or consortium, inform arts teachers, organize arts professional development (including organizing arts local learning communities), oversee/guide/organize the gathering of assessment data, represent the LEA or consortium arts program, and provide general leadership for arts education throughout the LEA or consortium.

C. “Beverley Taylor Sorenson Elementary Arts Learning Program model” means a Program in grades K-6 with the following components:

(1) a qualified arts specialist to work collaboratively with the regular classroom teacher to deliver quality, sequential, and developmental arts instruction in alignment with the state Fine Arts Core Curriculum;[~~ and~~]

(2) regular collaboration between the classroom teacher and arts specialist in planning arts integrated instruction[~~.~~]; and

(3) other activities that may be proposed by LEAs on a grant application and approved by the Board.

D. “Board” means the Utah State Board of Education.

E. “Endowed university” means an institution of higher education in the state as defined in Section 53A-17a-162(1)(b).

[~~E~~]F. “Highly qualified school arts program specialist (arts specialist)” means:

(1) an educator with a current educator license and a Level 2 or K-12 specialist endorsement in the art form; or

(2) an elementary classroom teacher with a current educator license who is currently enrolled in a Level 2 specialist endorsement program in the art form[~~ and who works with a mentor who holds an arts endorsement~~]; or

(3) a professional artist employed by a public school and accepted into the Board Alternative Routes to License (ARL)

program under R277-503 to complete a K-12 endorsement in the art form, which includes the Praxis exam in the case of art, music, or theatre[~~.~~]; or

(4) an individual who qualifies for any type of educator license under current Board rule that qualifies the individual for the position provided that:

(a) an LEA provides an affidavit verifying that a reasonable search was conducted for an individual who would qualify for an educator license through other means; and

(b) the LEA reopens the position and conducts a new search every two years.

([~~4~~]5) In addition to required licensure and endorsements, prospective teachers should provide evidence of facilitating elementary Core learning in at least one art form.

[~~F. "Independent evaluator," for purposes of this rule and Program, means an evaluator selected jointly by the Board and the Utah Arts Council through the required procurement process. The evaluator shall have experience and expertise in education programs and in the arts.~~]

G. "LEA" means a local education agency, including local school boards/public school districts, charter schools, and for purposes of this rule, the Utah Schools for the Deaf and the Blind.

H. "Matching funds," for purposes of this rule and Program, means funds that equal 20 percent of the total [~~grant amount received~~]costs for salary plus benefits incurred by an LEA/consortium to fund an LEA/consortium arts [~~coordinator under Section 53A-17a-162(3)(c) and~~]specialist in R277-490-[~~5~~]2F.

I. "USOE" means the Utah State Office of Education.

[~~J. "Utah Arts Council" is a state and nationally funded government entity that assists with professional development and provides direct matching grants to nonprofit organizations across the state of Utah. The Utah Arts Council also conducts programs which provide outreach services (including financial assistance) to schools, local arts councils and organizations,~~

~~community centers, performing groups, and individual artists.~~]

**R277-490-3. Arts Specialist Grant Program.**

A. LEAs or consortia of LEAs may submit grant requests consistent with time lines provided in this rule.

B. LEA consortia:

(1) LEAs may form consortia to employ arts specialists appropriate for the number of students served.

(2) The LEA shall develop its proposal consistent with the Beverley Taylor Sorenson Elementary Arts Learning Program model outlined under R277-490-[~~1~~]2C.

(3) The LEA grant shall explain the necessity or greater efficiency and benefit of an arts specialist serving several elementary schools within a consortium of LEAs.

(4) The LEA grant shall explain a schedule for the specialist(s) to serve the group of schools within several LEAs similarly to an arts specialist in a single school.

(5) A consortium grant shall provide information for a consortium arts specialist's schedule that minimizes the arts specialist's travel and allows the arts specialist to be well integrated into several schools.

C. [~~Arts specialist~~]LEA grant requirements

(1) Grant programs shall be developed and submitted to the Board consistent with the Beverley Taylor Sorenson Elementary Arts Learning Program model described in R277-490-[~~1~~]2C.

(2) LEA [~~G~~]grant applications shall include [~~documents of compliance with the collaboratively developed implementation requirements. These requirements shall be developed in consultation with a committee with representative members of stakeholder groups in the Program~~]the collaborative development of the application with the partner endowed university and School Community Council if match comes from School LAND Trust Funds.

[~~D. LEAs shall review grant applications and forward approved applications to the USOE.~~]

[~~E~~]D. [~~Arts specialist~~]Program timelines

(1) [~~Continuing~~ ]Beverley Taylor Sorenson [~~schools shall complete assurances as provided by the USOE and submit to school districts by May 1, annually~~]grant applications shall be completed annually. Grant renewals shall receive funding priority.

[~~(2) New Beverley Taylor Sorenson schools shall complete applications as provided by the USOE and submit to school districts by May 1, annually.~~]

([~~3~~]2) LEAs shall submit completed applications [~~requiring~~]requesting funding to the USOE by May [~~7~~]1 annually.

([~~4~~]3) The Board[~~, after close consultation with the Utah Arts Council,~~] shall designate [~~schools~~]LEAs/consortia for funding no later than June 1 annually.

[~~F~~]E. Distribution of funds for arts specialists

(1) [~~Continuing~~ ]Beverley Taylor Sorenson LEAs shall submit complete information of salaries (including benefits) of all Beverley Taylor Sorenson specialists employed by the LEA[~~, as requested by the USOE~~] no later than September 30 annually.

(2) The USOE shall distribute funds to [~~continuing~~] Beverley Taylor Sorenson LEAs annually [~~in equal amounts per~~] equal to 80 percent of the salaries plus benefits for approved hires in this program, consistent with Sections 53A-17a-162(5) and(6)[~~ and (7)~~]. An individual specialist grant amount shall be capped at $70,000.

[~~(3) The USOE shall distribute funds designated in Section 53A-17a-162(7) to additional Beverley Taylor Sorenson LEAs.~~]

**R277-490-4. Distribution of Funds for Arts Specialist Supplies.**

A. The Board shall distribute funds for arts specialist supplies to LEAs/consortia as available.

B. LEAs shall distribute funds to participating schools as provided in the approved LEA/consortia grant and consistent with LEA procurement policies.

C. LEAs/consortia shall require arts specialists to provide adequate documentation of arts supplies purchased consistent with the school/consortium plan, this rule and the law.

D. Summary information about effective supplies and equipment shall be provided in the school/consortium evaluation of the Program.

**R277-490-5. LEA/Consortia Employment of LEA/Consortia Arts Coordinators.**

A. LEAs/consortia may apply for funds to employ[~~ full-time~~] arts coordinators in their LEAs/consortium. These are intended as small grants to rural districts to help support arts education and the implementation of BTSALP.

B. Applicants shall explain how arts coordinators will be used consistent with the Beverley Taylor Sorenson Elementary Arts Learning Program model, what requirements arts coordinators must meet, and what training will be provided by whom.

C. Applicants shall provide documentation of committed matching funds that equal 20 percent of the grant request[~~ from the LEA/consortium~~].

[~~D. Preference shall be given to applicants that demonstrate in their proposed recruitment and use of coordinators diligent and creative efforts to employ arts coordinators who mirror the minority or unique populations that make up the schools in which coordinators will work.~~

~~E. The Board, following close consultation with the Utah Arts Council, shall select LEAs/consortia to receive funds under this section.~~]

[~~F~~]D. [~~Funds shall be distributed to designated LEAs/consortia~~]LEAs that receive grant awards shall be notified of the awards no later than [~~July~~]June 1 annually.

**R277-490-6. [~~Arts Program Partnership with Utah Institutions of Higher Education for Pre-service, Professional Development, Research, and Leadership Training~~]Endowed University**

**Participation in the BTSALP**.

A. The Board shall [~~work closely with the Utah Arts Council to identify interested Utah higher education institutions eligible, prepared and geographically and programmatically suited to work with identified arts specialists, arts coordinators and the schools and programs in which specialists/coordinators are employed~~]consult with endowed chairs and integrated arts advocates regarding program development and guidelines.

[~~B. The Board, in close partnership with the Utah Arts Council, shall determine funding and payment timelines to eligible Utah higher education institutions for designated services as appropriate and necessary.~~]

B. Endowed university grants:

(1) Endowed universities may apply for grant funds to fulfill the purposes of this program which include:

(a) delivery of high quality professional development to participating LEAs;

(b) the design and completion of research related to the program;

(c) providing the public with elementary arts education resources; and

(d) other program related activities as may be included in a grant application and approved by the Board.

(2) Endowed university grant applications shall include documentation of collaborative development of a plan for delivery of high quality professional development to participating LEAs. The Board shall determine the LEAs assigned to each endowed university.

(3) The Board may award no more than 10 percent of the total legislative appropriation to grants to endowed universities.

(4) The USOE shall monitor the activities of the grantees to ensure compliance with grant rules, fulfillment of grant application commitments and appropriate fiscal procedures. Endowed universities shall cooperate with the USOE in the monitoring of their grants.

(5) Endowed universities that receive grant funds shall consult, as requested by the Board, in the development and presentation of an annual written program report as required in statute.

**R277-490-7. LEAs Cooperation with USOE for BTSALP.**

A. USOE BTSALP staff may visit schools receiving grants to observe implementation of the grants.

B. BTSALP schools shall cooperate with the USOE to allow visits of members of the Board, legislators, and other invested partners to promote elementary arts integration.

C. LEAs must accurately report the numbers of students impacted by the Beverley Taylor Sorenson Grant and report on the delivery systems to those students as requested by the USOE.

D. LEAs found to be out of compliance with the terms of the grant will be notified within 30 days of the discovery of such non-compliance.

(1) LEAs found to be in non-compliance will be given 30 days to correct the issues.

(2) If non-compliance is not resolved within that time frame, LEAs are subject to losing the grant funds for the school or schools found to be non-compliant.

**R277-490-[~~7~~]8. Beverley Taylor Sorenson Elementary Arts Learning Program[~~ Evaluation and~~] Reporting.**

[~~A. The Board, in consultation with the Utah Arts Council, shall contract annually with an independent qualified evaluator through the state procurement process.~~

~~B.~~ ]The Board[~~ and the Utah Arts Council~~] shall[~~ jointly~~ ]report annually to the Education Interim Committee as provided in Section 53A-17a-162([~~6~~]8).

**KEY: arts program, grants, public schools**

**Date of Enactment or Last Substantive Amendment: [~~August 7, 2013~~]2015**

**Notice of Continuation: June 10, 2013**

289 **Authorizing, and Implemented or Interpreted Law: Art X Sec 3;**
290 **53A-1-401(3); 53A-17a-162**

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Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** Approve Procedures for Distributing New Money for the Professional Outreach Program for the Schools

---

**Background:**
In accordance with R277-444-3-D *Distribution of Funds to Arts and Sciences Organizations—Criteria for Eligibility, Applications, and Funding for POPS Organizations*, the distribution of new funding for the POPS organizations shall be at the discretion of the Board.

**Key Points:**
During the 2015 session of the Utah State Legislature, an additional $600,000 in one-time money and $100,000 in ongoing money was allocated for the current POPS organizations and an additional $50,000 was allocated for the RFP organizations.

**Anticipated Action:**
The Law and Licensing Committee will review recommendations regarding the distribution of the new money and direct staff in response to those recommendations.

**Contact:** Sydnee Dickson, 801-538-7515
Diana Suddreth, 801-538-7739
Cathy Jensen, 801-538-7793

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

**RECOMMENDATION TO THE UTAH STATE BOARD OF EDUCATION**

**Distribution of New Funding for the Professional Outreach Program in the Schools**

**Background:**

The Utah State Legislature allocated additional funding for the POPS program for the FY16. The group includes ten professional arts organizations and one subsidy program that provide in school and venue arts learning experiences for the schools. In addition three organizations are currently participating using the money designated by RFP by the legislature last year. The Board has discretion on how new funding should be distributed. Each organization is required to match the legislative funding 1:1. The new funding is in three categories:

| | |
|---|---|
| On-going: | $100,000 |
| One-time: | $600,000 |
| RFP One-time: | $250,000* |

*$50,000 increase from last year

**Recommendation:**

| | |
|---|---|
| On-going: | Distribute the $100,000 to the ten POPS organizations and the subsidy program according to the percentage of the funds they currently receive. |
| One-time: | Distribute $200,000 to the ten POPS organizations and the subsidy program according to the percentage of the funds they currently receive. |
| | Distribute $400,000 to the ten POPS organizations in equal amounts ($40,000). |
| RFP One-time: | Distribute the additional $50,000 to the three RFP groups according to the percentage of the funds they currently receive. |

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Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** Approve New Charter School Applications for 2016-2017 School Year

---

**Background:**
The State Charter School Board (SCSB) is charged in UCA 53A-1a-501.6 with authorizing and promoting the establishment of charter schools. The SCSB heard presentations from nine applicant groups seeking to open in the 2016-2017 school year and held governing board capacity interviews with each. The purpose of the presentations and interviews was to determine if the applicants met at least one of the purposes of charter schools (UCA 53A-1a-503) and could provide evidence that the school's governing board was knowledgeable and capable of overseeing a public school receiving state taxpayer dollars.

To be approved under UCA 53A-1a-501.9, an applicant had to demonstrate it employed a new and creative method to meet the unique learning style and needs of students; to be approved under UCA 53A-1a-502.5, an applicant had to demonstrate it was located in a high growth area of the state and commit to giving preferential enrollment to students within a two-mile radius of the school.

**Key Points:**
The SCSB authorized six of the nine schools considered. In addition, the SCSB determined four applicants met the criteria in UCA 53A-1a-501.9, including Wasatch Waldorf Charter School, Franklin Discovery Academy, Wallace Stegner Academy, and Athlos Academy. According to statute, the Board must submit a request to the Legislature for funding for schools approved under this section of code. Athlos Academy also met the criteria in UCA 53A-1a-502.5. In addition, St. George Academy and American Academy of Innovation were authorized, but without preferential status under either statute. The full charter applications can be found at http://schools.utah.gov/charterschools/State-Charter-School-Board/2015-Board-Meetings/January-2015.aspx

**Anticipated Action:**
The Law and Licensing Committee will consider approving these six new charter schools to open in the 2016-2017 school year as outlined in their applications. If approved by the Committee, the Board will consider approving the applications.

**Contact:** Dr. Marlies Burns, Executive Director, State Charter School Board, 801-538-7817

**Utah State Board of Education**
**Executive Summary Report**

This summary report was submitted to Brad C. Smith, State Superintendent of Public Instruction, Utah State Office of Education, two weeks ahead of the regularly scheduled USBE meetings for approval and inclusion in the board's agenda materials. Only that which is in writing, and included in the agenda materials, shall be considered by the USBE in its final approval process. Attachments, by way of clarification, or elaboration, may be included.

1. Charter School Wasatch Waldorf Charter School

2. Authorized Agent Emily Merchant Phone 703-853-0987

3. Mailing Address (authorized agent) 1800 East Harrison Avenue City Salt Lake City

4. The charter school is approved to open one campus in one of the following school district(s): Granite, Murray, or Salt Lake City School Districts

5. When is the charter school expected to begin operations? August 2016

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

   Bryon Harvis
   Kim Haleck
   Emily Thunberg
   John Hardy
   Robert Macdonald
   Lisa Canella
   Emily Merchant

7. Summary description of charter school (mission statement):

   Wasatch Waldorf Charter School (WWCS) provides a K–8 public Waldorf education that is dedicated to the optimal development of each individual child. WWCS nurtures intellectual, social and emotional, and physical capacities through an artistic, hands-on, interdisciplinary approach to core academic subjects which enables each student to blossom into an imaginative, engaged, competent, life-long learner.

8. Is this charter school an extension or expansion of a currently existing charter school? (If so, attach student achievement data from existing charter school).

   No, Wasatch Waldorf Charter School is a new school application.

9. How many students will the school serve and at what grades? Does the grade configuration align with the local school district configuration?

Ultimate enrollment 540 students Grades K – 8

The grade configuration matches Salt Lake City School District, but does not match Granite or Murray School Districts.

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

Yes, Wasatch Waldorf Charter School's curriculum is fully aligned with the Utah State Board of Education's approved curriculum.

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

The school will offer a continuum of student placement and special education services to students with disabilities in compliance with state and federal law and regulation and individual student IEPs.

12. Does the school have a building site or actual building ready to serve students? What are the financial stipulations in the use of that building?

Wasatch Waldorf Charter School will meet the requirements in UCA 53A-1a-507 and R277-482 by submitting any facility financing agreements to the State Charter School Board for advice prior to signing and having its building under construction by January 1, 2016, respectively.

13. Has a financial analysis been conducted and is there a strong likelihood the charter school will financially succeed?

Yes, the State Charter School Board has reviewed Wasatch Waldorf Charter School's budget to ensure that its finances are viable and there is a strong likelihood of financial success.

14. Who will perform the financial accounting for the school (by name) and what are his/her credentials for accounting?

The business manager or management company has not been named at this time but will be named prior to the school opening. The school included a detailed list of roles and responsibilities for the business manager/management company.

15. Please provide a brief summary of other points the State Charter School Board would like the Utah State Board of Education to consider in making the decision to approve the charter school:

Prioritized 1st by the State Charter School Board.

The State Charter School Board is pleased to see the public Waldorf education model come to Utah and approved authorization of this school under UCA 53A-1a-501.9 (i.e., the applicant

demonstrated it employed a new and creative method to meet the unique learning style and needs of students).

16. Votes of the SCSB in approving the charter school application:

Recommended full approval: Tim Beagley, Dean Brockbank, Robb Enger, Kristin Elinkowski, DeLaina Tonks

Not in attendance for vote: Howard Headlee, Bruce Davis

**Utah State Board of Education**
**Executive Summary Report**

This summary report was submitted to Brad C. Smith, State Superintendent of Public Instruction, Utah State Office of Education, two weeks ahead of the regularly scheduled USBE meetings for approval and inclusion in the board's agenda materials. Only that which is in writing, and included in the agenda materials, shall be considered by the USBE in its final approval process. Attachments, by way of clarification, or elaboration, may be included.

1. Charter School Franklin Discovery Academy

2. Authorized Agent Jennifer Price Phone 801-374-3500

3. Mailing Address (authorized agent) 115 South 1370 East City Lindon

4. The charter school is approved to open one campus in the following school district: Alpine

5. When is the charter school expected to begin operations? August 2016

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

   Jennifer Price
   Julie Chacon
   Wendy Porter
   Pamela Luke
   Audrey Bridgstock
   Teresa Haws
   Russell Duncan
   Daniel L. Randall
   Cindy Busard
   Jana Duncan
   Gerald A. Price

7. Summary description of charter school (mission statement):

   Franklin Discovery Academy will cultivate a life-long sense of wonder and curiosity in every student. Franklin Discovery Academy will equip students to discover meaningful value and purpose in the world and reach their full potential by helping them develop the ability to think critically, communicate effectively, and excel academically.

8. Is this charter school an extension or expansion of a currently existing charter school? (If so, attach student achievement data from existing charter school).

   No, Franklin Discovery Academy is a new school application.

9. How many students will the school serve and at what grades? Does the grade configuration align with the local school district configuration?

| | | |
|---|---|---|
| 2016-2017 | 500 students | Grades K – 6 |
| 2017-2018 | 600 students | Grades K – 6 |
| 2018-2019 | 750 students | Grades K – 6 |
| Ultimate enrollment | 750 students | Grades K – 6 |

Yes, the grade configuration aligns with the local school district.

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

Yes, Franklin Discovery Academy's curriculum is fully aligned with the Utah State Board of Education's approved curriculum.

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

The school will offer a continuum of student placement and special education services to students with disabilities in compliance with state and federal law and regulation and individual student IEPs.

12. Does the school have a building site or actual building ready to serve students? What are the financial stipulations in the use of that building?

Franklin Discovery Academy will meet the requirements in UCA 53A-1a-507 and R277-482 by submitting any facility financing agreements to the State Charter School Board for advice prior to signing and having its building under construction by January 1, 2016, respectively.

13. Has a financial analysis been conducted and is there a strong likelihood the charter school will financially succeed?

Yes, the State Charter School Board has reviewed Franklin Discovery Academy's budget to ensure that its finances are viable and there is a strong likelihood of financial success.

14. Who will perform the financial accounting for the school (by name) and what are his/her credentials for accounting?

The business manager or management company has not been named at this time but will be named prior to the school opening. The school included a detailed list of roles and responsibilities for the business manager/management company.

15. Please provide a brief summary of other points the State Charter School Board would like the Utah State Board of Education to consider in making the decision to approve the charter school:

Prioritized 2nd by the State Charter School Board.

The State Charter School Board approved authorization of Franklin Discovery Academy, as well as under UCA 53A-1a-501.9 (i.e., the applicant demonstrated it employed a new and creative method to meet the unique learning style and needs of students). Only one campus was approved.

16. Votes of the SCSB in approving the charter school application:

Recommended full approval: Tim Beagley, Dean Brockbank, Kristin Elinkowski, Robb Enger, DeLaina Tonks

Not in attendance for vote: Howard Headlee, Bruce Davis

**Utah State Board of Education**
**Executive Summary Report**

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1. Charter School Wallace Stegner Academy

2. Authorized Agent Anthony Sudweeks Phone 801-884-7950

3. Mailing Address (authorized agent) 342 Edith Avenue City Salt Lake City

4. The charter school is approved to open one campus in the following school district: Salt Lake City

5. When is the charter school expected to begin operations? August 2016

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

   Anthony Sudweeks
   Adam Gerlach
   Reed Farnsworth
   Sarah Vaghan
   Jeremy Schow
   Andrew Bernstein

7. Summary description of charter school (mission statement):

   Wallace Stegner Academy will foster a community of active learners through academic rigor and citizenship by providing an opportunity for at-risk students to close the achievement gap and achieve academic excellence through: direct instruction; data-driven instruction; ability-based mathematics, language arts, and reading classes; positive learning environments; and character development.

8. Is this charter school an extension or expansion of a currently existing charter school? (If so, attach student achievement data from existing charter school).

   No, Wallace Stegner Academy is a new school application.

9. How many students will the school serve and at what grades? Does the grade configuration align with the local school district configuration?

| | | |
|---|---|---|
| 2016-2017 | 690 students | Grades K – 7 |
| 2017-2018 | 780 students | Grades K – 8 |
| 2018-2019 | 810 Students | Grades K – 8 |
| Ultimate enrollment | 810 students | Grades K – 8 |

Yes, the grade configuration aligns with the local school district.

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

Yes, Wallace Stegner Academy's curriculum is fully aligned with the Utah State Board of Education's approved curriculum.

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

The school will offer a continuum of student placement and special education services to students with disabilities in compliance with state and federal law and regulation and individual student IEPs.

12. Does the school have a building site or actual building ready to serve students? What are the financial stipulations in the use of that building?

Wallace Stegner Academy will meet the requirements in UCA 53A-1a-507 and R277-482 by submitting any facility financing agreements to the State Charter School Board for advice prior to signing and having its building under construction by January 1, 2016, respectively.

13. Has a financial analysis been conducted and is there a strong likelihood the charter school will financially succeed?

Yes, the State Charter School Board has reviewed Wallace Stegner Academy's budget to ensure that its finances are viable and there is a strong likelihood of financial success.

14. Who will perform the financial accounting for the school (by name) and what are his/her credentials for accounting?

The business manager or management company has not been named at this time but will be named prior to the school opening. The school included a detailed list of roles and responsibilities for the business manager/management company.

15. Please provide a brief summary of other points the State Charter School Board would like the Utah State Board of Education to consider in making the decision to approve the charter school:

Prioritized 3rd by the State Charter School Board.

The State Charter School Board approved authorization of this school under UCA 53A-1a-501.9 (i.e., the applicant demonstrated it employed a new and creative method to meet the unique learning style and needs of students).

16. Votes of the SCSB in approving the charter school application:

Recommended full approval: Tim Beagley, Dean Brockbank, Robb Enger, Kristin Elinkowski, DeLaina Tonks

Not in attendance for vote: Howard Headlee, Bruce Davis

**Utah State Board of Education**
**Executive Summary Report**

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1. Charter School Athlos Academy of Utah

2. Authorized Agent Sean Morris Phone 801-971-4401

3. Mailing Address (authorized agent) 1353 West 2050 South City Wood Cross

4. The charter school is approved to open one campus in the following school district: Jordan

5. When is the charter school expected to begin operations? August 2016

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

   Sean Morris
   Andy Lavin
   Nichole Coombs
   Lisa Davis

7. Summary description of charter school (mission statement):

   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.

8. Is this charter school an extension or expansion of a currently existing charter school? (If so, attach student achievement data from existing charter school).

   No, Athlos Academy of Utah is a new school application.

9. How many students will the school serve and at what grades? Does the grade configuration align with the local school district configuration?

| | | |
|---|---|---|
| 2016-2017 | 832 students | Grades K-8 |
| 2017-2018 | 936 students | Grades K-8 |
| 2018-2019 | 1040 students | Grades K-9 |
| Ultimate enrollment | 1040 students | Grades K-9 |

   Yes, the grade configuration aligns with the local school district.

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

    Yes Athlos Academy of Utah's curriculum is fully aligned with the Utah State Board of Education's approved curriculum.

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

    The school will offer a continuum of student placement and special education services to students with disabilities in compliance with state and federal law and regulation and individual student IEPs.

12. Does the school have a building site or actual building ready to serve students? What are the financial stipulations in the use of that building?

    Athlos Academy of Utah will meet the requirements in UCA 53A-1a-507 and R277-482 by submitting any facility financing agreements to the State Charter School Board for advice prior to signing and having its building under construction by January 1, 2016, respectively.

13. Has a financial analysis been conducted and is there a strong likelihood the charter school will financially succeed?

    Yes, the State Charter School Board has reviewed Athlos Academy of Utah's budget to ensure that its finances are viable and there is a strong likelihood of financial success.

14. Who will perform the financial accounting for the school (by name) and what are his/her credentials for accounting?

    Charter Solutions will designate an employee to provide financial accounting for the school, but that individual has not yet been named. Charter Solutions currently provides financial accounting services for multiple Utah charter schools.

15. Please provide a brief summary of other points the State Charter School Board would like the Utah State Board of Education to consider in making the decision to approve the charter school:

    Prioritized 4th by the State Charter School Board.

    The State Charter School Board approved authorization of this school under UCA 53A-1a-501.9 (i.e., the applicant demonstrated it employed a new and creative method to meet the unique learning style and needs of students) and UCA 53A-1a-502.5 (i.e., the applicant demonstrated it was located in a high growth area of the state and committed to giving preferential enrollment to students within a 2-mile radius of the school).

    State Charter School Board members had some question following authorization. Attached is the school governing board's response to those questions.

16. Votes of the SCSB in approving the charter school application:

Recommended full approval: Tim Beagley, Dean Brockbank, Robb Enger, Kristin Elinkowski, Howard Headlee, DeLaina Tonks

Not in attendance for vote: Bruce Davis

March 9, 2015

Marlies Burns, Ed.D. Executive
Director
Utah State Charter School Board

Dear Dr. Burns,

As the Governing Board for Athlos Academy of Utah we would like to express our concern with this process. We received unanimous approval from the State Charter School Board, but upon further review we have been presented with a line of questions asking far more of us than has been asked of other governing boards. This is a large task to accomplish on short notice, and we feel obligated to express our frustration with this unexpected step in the process as well as with the aggressive language of the questions.

However, Athlos Academy of Utah is looking forward to a long and positive relationship with the SCSB and with the charter community in Utah in general, and while many of the questions are addressed in the Charter Application, we are happy to address them again here. We have invited both the President and the Director of Academics from Athlos Academies to join us today as they are best positioned to speak to your concerns about the intentions of their company.

We are a volunteer board, and as is true with all volunteers, our time commitment is limited. With that in mind, we have sought out a partnership with an ESP to help us responsibly provide an educational model that we truly believe in. We did not choose Athlos Academies lightly, and in fact, our due diligence includes flying to Minnesota to visit a school in action and sit in on a teacher training offered by the ESP. We have also visited the Athlos Academies team in Boise to learn more about their model and meet the people who will support our school's success.

Athlos Academies is a young management organization, but they have proven themselves in integrity and commitment to students and families. The model is research based and professionally supported.

As a Board, we want what is best for our students. We want a choice that is innovative and that gives all students access to learning and achieving success in college, career, and life. We believe that the Athlos Academy model provides holistic education, and we are excited about our partnership with them in moving forward.

We as a board have gone to great lengths to provide you with the requested information, taking the time to respond to the many questions in the included document. Some of these questions were outside the relevance to Athlos Academy of Utah's application. Therefore it was necessary to involve Athlos Academies to provide assistance with the requested information, which is included in the attached appendices. It is the Board's hope that with these responses, the SCSB has a complete understanding of the benefits of this partnership, and we can move forward with final approval.

Sincerely,
The Governing Board of Athlos Academy
of Utah Sean Morris
Nichole Coombs Lisa Davis Andrew Lavin

1) Please list the 22 schools you represented that Athlos Academy, Inc. has started?
Schools that have partnered with Athlos Academies are listed in Appendix 1. The Governing Board of Athlos Academy of Utah has chosen to partner with Athlos Academies to support the launch and ongoing success of the school. The Governing Board will separately negotiate a lease agreement and a management services agreement upon final approval of the charter.
   a) When did they open? Where (city and state)? What is their current standing? Athlos Academy, Inc. play in each of these start-ups? Would each of these schools identify themselves as having been "started" by Athlos Academy, Inc.?
   Each of these schools would identify themselves having a partnership with Athlos Academies. The chart in Appendix 1 presents this data.
   b) Are any of the schools started by Athlos Academy, Inc. no longer affiliated with the company? If so, why?
   All of the schools that have partnered with Athlos Academies for services are still affiliated with the company. The chart in Appendix 1 presents this data.

2) Of the 11 successful schools Athlos Academy, Inc. currently runs, please list those schools, their locations, and their academic, financial, and enrollment performance that lead you to define them as "successful." (provide information for each school separately)
For all responses in this section please see **Appendix 2** for further narrative and data representation.
   a) How many of these schools were new schools approved through the state charter system?
   Currently, Athlos Academies has partnered with 12 schools that have been approved through state charter systems (note Appendix 2).
   b) How many were take-overs? (i.e., existing schools where Athlos Academy, Inc. has taken over an existing charter schools/programs/students)
   Athlos Academies has never participated in a "take-over". All schools that have partnered with Athlos Academies maintain their own staff, leadership, and board members. Athlos Academies is often approached to help schools with select and specific areas of need as determined by the school's leadership and governing board. Neither the schools nor Athlos Academies refers to these partnerships as "take- overs". In situations in which Athlos Academies provides management services, the school's governing board holds Athlos Academies accountable through a contract.
   c) What is the ongoing role of Athlos Academy, Inc. in the operation of these schools?
   In response to this section, more information is provided in narrative form in Appendix 2
      i) Does Athlos Academy, Inc. have any positions on the governing board of the school? If so, what position(s)?
      No. Athlos Academies does not hold positions on a governing board at any school.
      ii) Does Athlos Academy, Inc. have administrative responsibilities in the school? If so, what responsibilities?
      The Governing Board of Athlos Academy of Utah plans to contract with Athlos Academies to provide administrative services as described in the charter application (see Appendix 2).
      iii) What is the daily operational role of Athlos Academy, Inc. in each of these schools, if any?
      The appropriate members of Athlos Academies may be asked to enter the school for professional development, curriculum development, and management services. Athlos Academies participates in daily school operations at the school as contracted by the Governing Board.
      iv) Does Athlos Academy, Inc. have their staff in these schools? If so, what are their jobs?
      No, Athlos Academies does not have any of their staff in schools. However, for Athlos Academy of Utah, Athlos Academies, as part of the negotiated management services, will

provide the Principal, Assistant Principal, and Business Manager for Athlos Academy of Utah. The two school leaders will be employed and trained by the Management Organization, and will be jointly evaluated by Athlos Academies and the Governing Board of Athlos Academy of Utah. In addition, the Business Manager will be employed through Charter Solutions, a service provider that already has experience and an excellent track record in Utah.

v) Provide the amount Athlos Academy, Inc. is paid for CMO services for each of these schools (separately).
This information varies from school to school and state to state. The fee is determined by the range of services and falls between 4-12%.

vi) Can Athlos Academy, Inc. provide operational contracts it has with other schools so we can understand the role and limits of authority it maintains for these schools?
Sample contract was provided in the charter application (Appendix B of the Charter Application, beginning on page 107).

3) Athlos Academy, Inc. said confusion comes from being a CMO and that it is a curriculum. However, it appears that their primary modus operandi is to take over an existing charter school, continue to use that school's academic curriculum, with some sort of Athlos overlay. What is it Athlos Academy, Inc. will bring to your school?
Athlos Academies both partners with existing schools and fully manages others. As all schools associated with Athlos Academies maintain independent governing boards, no partnership can be considered a "take-over".

Athlos Academies offers a wide range of services including, but not limited to, school operations support, professional development, instructional support, and curriculum. Athlos Academies provides both an athletic curriculum and a performance character curriculum, and also has academic experts on staff to assist schools with reviewing other curriculum choices. Athlos Academies is not just a curriculum provider, but offers a variety of services in support of high quality schools.

For all responses in this section please see **Appendix 3** for further narrative and data representation.

a) If Athlos Academy, Inc. is providing a "curriculum" – has it been approved as consistent with the required curriculum of each state? (MN, AZ, TX, etc.)
Yes. The curriculum that Athlos Academies provides is scoped and sequenced to meet or exceed each state's requirements.

b) How many current Athlos schools are using the Athlos Academy, Inc. curriculum? How many are also using another curriculum? How many are using their prior curriculum?
12 schools implement some, or all, of the Athlos Academies' model. Please refer to Section 4 (pages 30-42) in the charter for more information about the Math, Literacy, and Athlos Academies curriculum selections made by the Governing Board.

c) What is the Athlos Academy, Inc. curriculum? How is it unique?
Please refer to Section 4 (pages 30-42) in the charter and **Appendix 3** at the end of this document.

4) Regarding your contract with Athlos Academy, Inc.:
For all responses in this section please see **Appendix 4** for further narrative and data representation.

a) Does it have a role in the selection of governing board members? If so, describe the role. Also, will any board members be compensated (in any way) for serving with the school?
No. The board is volunteer and interest based only with no compensation. Athlos Academies may provide community out-reach opportunities for interest and support, but the governing

board is established by volunteers and works in conjunction with the school leadership.

b) Does it have a role in selection of staff? If so, describe the role.
As part of the negotiated management services, Athlos Academies will provide the Principal, Assistant Principal, and Business Manager for Athlos Academy of Utah. These employees will maintain Utah licensure and attend local meetings and trainings offered by the USOE. Their performance will be overseen by the Governing Board of Athlos Academy of Utah through contract.

c) Does it have a role in determining budgets? If so, describe the role.
Athlos Academies as a Management Organization provides guidance in back office and operations paperwork and documents. The budget may be a part of this service as per the request of the school leadership and the governing board.

d) Does it have any other operational control? If so, describe the role(s).
Athlos Academies does not have other operational controls unless there is invitation from school leadership and the governing board over time and as needed for support services.

e) Does it have any control over facilities construction/bonding? If so, describe the role.
Athlos Academies provides the facility which is leased with a purchase option. Athlos Academy of Utah may choose when the school purchases the building. Further explanation is in the appendix narrative.

f) Will there be a continued relationship with Athlos Academy, Inc. after you bond for your facility? If so, describe the relationship.
Yes. The lease agreement is negotiated separately from the management services agreement. This ensures that when the school chooses to purchase the building, the school will not experience any gaps in management services.

g) Are you required to use the Athlos Academy, Inc. curriculum and CMO services for any length of time, or can you opt out (of one or both) at any time if determined to be in the best interest of the school?
Athlos Academy of Utah will negotiate management services with Athlos Academies upon official approval of the charter. The Governing Board will hold Athlos Academies accountable for the quality of their services. As such, there will be a default provision in this contract. A sample contract is provided as Appendix B of the Charter Application, and can be found beginning on page 107 of that document.

**Appendix 1**

| Athlos Partner School | Year of Partnership | Partnered for Facilities | Partnered for Curriculum | Partnered for Management Services |
|---|---|---|---|---|
| Compass Charter School *(Meridian, ID)* | 2007 | ✓ | | |
| Candeo Schools *(Peoria, AZ)* | 2008 | ✓ | | |
| Hawthorne Academy *(West Jordan, UT)* | 2008 | ✓ | | |
| Legacy School *(Mesa, AZ)* | 2009 | ✓ | | |
| Legacy Traditional *(Queen Creek/Ironwood, AZ)* | 2010 | ✓ | ✓ | |
| Legacy Traditional *(Casa Grande, AZ)* | 2010 | ✓ | | |
| Athlos Traditional Academy *(Chandler, AZ)* | 2011 | ✓ | ✓ | |
| Legacy Traditional *(Avondale, AZ)* | 2011 | ✓ | | |
| Legacy Traditional *(Oro Valley, AZ)* | 2011 | ✓ | | |
| Providence Hall *(Herrriman, UT)* | 2011 | ✓ | | |
| Legacy Traditional *(Laveen, AZ)* | 2012 | ✓ | | |
| Legacy Traditional *(Gilbert, AZ)* | 2013 | ✓ | ✓ | |
| Athlos Leadership Academy *(Austin, TX)* | 2014 | ✓ | ✓ | ✓ |
| Athlos Leadership Academy *(Brownsville, TX)* | 2014 | ✓ | ✓ | ✓ |
| Athlos Leadership Academy *(Brooklyn Park, MN)* | 2014 | ✓ | ✓ | ✓ |
| Athlos Leadership Academy *(San Antonio, TX)* | 2014 | ✓ | ✓ | ✓ |
| ILT, Powered by Athlos *(Arlington, TX)* | 2014 | ✓ | ✓ | ✓ |
| ILT, Powered by Athlos *(Fort Worth, TX)* | 2014 | ✓ | ✓ | ✓ |
| ILT, Powered by Athlos *(Garland, TX - K8)* | 2014 | ✓ | ✓ | ✓ |
| ILT, Powered by Athlos *(Garland, TX - HS)* | 2014 | ✓ | ✓ | ✓ |
| Legacy Traditional *(Surprise, AZ)* | 2015 | ✓ | | |
| Athlos Preparatory Academy *(Lakeville, MN)* | 2016 | ✓ | ✓ | ✓ |

For nearly eight years, Athlos Academies has been asked by 22 schools for assistance in various capacities including facilities, curriculum, or managing. These schools sought out Athlos Academies to assist with meeting the intricate needs they all had. Currently, the levels of implementation and partnerships vary from fully managed to partially managed partnerships between individual schools.

**Appendix 2**

Athlos Academies believes that truly successful schools are comprised of much more than test results and waiting lists. The model focuses on enabling educational leaders to impact every classroom, and every student. This is accomplished by supporting schools with administrative capabilities and curriculum development by assisting with the operational or curricular barrier they are experiencing. Therefore, Athlos Academies relies on the leadership and governing boards at the local school level to develop a culture of learning that supports high academic achievement. Athlos Academy of Utah has chosen to be a fully implemented Athlos Academies school (including curriculum, services, and support). The chart in **Appendix 1** delineates schools across the nation that have partnered with Athlos Academies to utilize components to support their schools. In answering your specific question, please reference the table that shows enrollment projections for Utah on page 3 of the Governing Board's charter application and the information about other affiliated (but not fully managed) schools on pages 18-19.

Continuous improvement is at the forefront of the Athlos Academies philosophy of long-term school support. Ongoing support, training, and services through the partnership require involvement and a level of service that is unmatched. However, *governance* of the school is the responsibility of the governing board; *management* services are the responsibility of Athlos Academies under contract with Athlos Academy of Utah. In accordance with the Governing Board's proposed bylaws, Athlos Academies will not have any positions on the governing board. However, Athlos Academies will provide ongoing training and professional development opportunities for the governing board as needed. Athlos Academies will employ, in partnership with the Governing Board, three administrators consisting of the Principal, Assistant Principal, and Business Manager to ensure program fidelity and fiscal accountability. These highly qualified administrators will have Utah licenses and credentials and will be responsible for the day to day operations, much like their counterparts in traditional schools. Daily operations include: academic outcomes, the implementation of Utah's educational standards, staff professional development, and maintaining school culture. These responsibilities are delineated in the charter proposal, pages 85-97. All other administrative support staff, faculty, paraprofessionals, media specialist, guidance counselor, and maintenance employees will be employees of Athlos Academy of Utah.

The Governing Board of Athlos Academy of Utah and Athlos Academies are committed to maintaining the overall integrity of the school itself. With that in mind, Athlos Academies works hard to provide affordable management services. This is about the students and the learning experience, and the management costs need to be supportive of that priority.

**Appendix 3**

Athlos Academies is a Social Venture model that has multiple facets as a company.
As a Management Organization, Athlos Academies will provide an expertly developed athletic, performance character, and high academic curriculum which will meet or exceed Utah's educational standards. Athlos Academies will also provide development opportunities for governing boards, school administration, and teachers, assistance with school launch, and ongoing daily operations.

The Governing Board of Athlos Academy of Utah has chosen to adopt both the curricular planning and 3 Pillar model from Athlos Academies as well as enlist in their offerings as a Management Organization for

our charter. To specifically answer your question, Athlos Academies is providing both curriculum and management services for our Board and our school. The initial draft of our management agreement is available in Section 9 (pages 105-110) and in Appendix B in the charter document.

The Board of Directors of Athlos Academy of Utah, as part of their due diligence in choosing to work with Athlos Academy, visited the Brooklyn Park, MN Athlos Leadership Academy to see a school in action and attended a teacher training provided by Athlos Academies. Additionally, the Board of Directors has visited the Athlos Academies offices in Boise to attend a model overview presentation. The Board of Directors feels confident that Athlos Academies can help us achieve a successful launch and offer long-term support for Athlos Academy of Utah.

The chart from Appendix 1 in this document shows the vast differences in partnerships between schools in multiple states and Athlos Academies, but articulates the successful experience and expertise. The Governing Board of Athlos Academy of Utah is confident that partnering with this young and evolving company will best meet the needs of the students.

Description of the Athlos Athletic, Performance Character curricular, and academic programs are discussed in Section 4 of the charter application, pages 34-40. These programs are unique because of its 3 Pillar approach, its depth of both academic and social/emotional learning and development for students, and its ability to work towards state and national standards while still focusing on the WHOLE child development.

**Appendix 4**

Athlos Academies believes that local school boards should govern their schools with distinct autonomy. For this reason, the Athlos Academy of Utah charter proposal (pages 55-58) outlines that Athlos Academies will not determine the selection of Governing Board members, nor will board members be compensated. Because staff members will be employees of the Athlos Academy of Utah, the Governing Board will have an influential role in hiring practices and procedures in conjunction with the school leaders. Athlos Academies will work with the Governing Board to determine budgets and priorities that support teaching, learning, and operations at their school. Daily operations will be the responsibility of the administrative staff with support from Athlos Academies. If the Governing Board of Athlos Academy of Utah decides to bond for their facility, at their discretion and choice, they can continue contracted services, support, and curricular programs. Through an agreement between the governing board and Athlos Academies, it will be articulated that the governing board has the final authority over the delivery of any curriculum utilized in the school. The charter proposal delineates ongoing implementation of the Athlos curriculum, which will meet or exceed Utah State Standards.
Athlos Academy of Utah has delineated that there is no intention of opting out of the Athlos curriculum pillars. The components of these benefits are further described in detail on Section 4 (pages 30-42) of the Charter Proposal.

**Utah State Board of Education**
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1. Charter School St. George Academy

2. Authorized Agent Steve Wattles Phone 435-625-1799

3. Mailing Address (authorized agent) 1995 Dove Circle City Santa Clara

4. The charter school is approved to open one campus in the following school district: Washington

5. When is the charter school expected to begin operations? August 2016

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

   Stephen Wattles
   Kevin Abraham
   Owen Olsen
   Eric Grob
   David Jones
   Curt Crofts
   Kris Griffith
   Tara Griffith
   Ellen Arch

7. Summary description of charter school (mission statement):

   St. George Academy will provide students with a strong academic foundation preparing them for a successful college experience and their future learning endeavors.

8. Is this charter school an extension or expansion of a currently existing charter school? (If so, attach student achievement data from existing charter school).

   No, St. George Academy is a new school application.

9. How many students will the school serve and at what grades? Does the grade configuration align with the local school district configuration?

| | | |
|---|---|---|
| 2016-2017 | 350 students | Grades 9 – 12 |
| 2017-2018 | 450 students | Grades 9 – 12 |
| 2018-2019 | 550 students | Grades 9 – 12 |
| Ultimate enrollment | 550 students | Grades 9 – 12 |

No, the grade configuration does not align with the local school district.

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

Yes, St. George Academy's curriculum is fully aligned with the Utah State Board of Education's approved curriculum.

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

The school will offer a continuum of student placement and special education services to students with disabilities in compliance with state and federal law and regulation and individual student IEPs.

12. Does the school have a building site or actual building ready to serve students? What are the financial stipulations in the use of that building?

St. George Academy will meet the requirements in UCA 53A-1a-507 and R277-482 by submitting any facility financing agreements to the State Charter School Board for advice prior to signing and having its building under construction by January 1, 2016, respectively.

13. Has a financial analysis been conducted and is there a strong likelihood the charter school will financially succeed?

Yes, the State Charter School Board has reviewed St. George Academy's budget to ensure that its finances are viable and there is a strong likelihood of financial success.

14. Who will perform the financial accounting for the school (by name) and what are his/her credentials for accounting?

The business manager or management company has not been named at this time but will be named prior to the school opening. The school included a detailed list of roles and responsibilities for the business manager/management company.

15. Please provide a brief summary of other points the State Charter School Board would like the Utah State Board of Education to consider in making the decision to approve the charter school:

Prioritized 5th by the State Charter School Board.

The State Charter School Board approved authorization of this school. While there were initially questions and concerns regarding the college preparation focus of this school, the applicant satisfactorily answered these questions.

16. Votes of the SCSB in approving the charter school application:

Recommended full approval: Tim Beagley, Dean Brockbank, Robb Enger, Kristin Elinkowski, Howard Headlee, DeLaina Tonks

Not in attendance for vote: Bruce Davis

**Utah State Board of Education**
**Executive Summary Report**

This summary report was submitted to Brad C. Smith, State Superintendent of Public Instruction, Utah State Office of Education, two weeks ahead of the regularly scheduled USBE meetings for approval and inclusion in the board's agenda materials. Only that which is in writing, and included in the agenda materials, shall be considered by the USBE in its final approval process. Attachments, by way of clarification, or elaboration, may be included.

1. Charter School American Academy of Innovation

2. Authorized Agent German Lopez Phone 801-201-5030

3. Mailing Address (authorized agent) 5806 West Copper Stone Drive City South Jordan

4. The charter school is approved to open one campus in the following school district: Jordan

5. When is the charter school expected to begin operations? August 2016

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

   German Lopez
   Shane T. Clark
   Ann Sharp
   Alfonso Flores
   Rodayne Esmay
   Ken Karren

7. Summary description of charter school (mission statement):

   The American Academy of Innovation combines academic rigor with career technology skills and international partnerships to prepare students for success in a global marketplace.

8. Is this charter school an extension or expansion of a currently existing charter school? (If so, attach student achievement data from existing charter school).

   No, American Academy of Innovation is a new school application.

9. How many students will the school serve and at what grades? Does the grade configuration align with the local school district configuration?

| | | |
|---|---|---|
| 2016-2017 | 360 students | Grades 6-12 |
| 2017-2018 | 420 students | Grades 6-12 |
| Ultimate enrollment | 420 students | Grades 6-12 |

   No, the grade configuration does not align with the local school district.

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

Yes, American Academy of Innovation's curriculum is fully aligned with the Utah State Board of Education's approved curriculum.

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

The school will offer a continuum of student placement and special education services to students with disabilities in compliance with state and federal law and regulation and individual student IEPs.

12. Does the school have a building site or actual building ready to serve students? What are the financial stipulations in the use of that building?

American Academy of Innovation will meet the requirements in UCA 53A-1a-507 and R277-482 by submitting any facility financing agreements to the State Charter School Board for advice prior to signing and having its building under construction by January 1, 2016, respectively.

13. Has a financial analysis been conducted and is there a strong likelihood the charter school will financially succeed?

Yes, the State Charter School Board has reviewed American Academy of Innovation's budget to ensure that its finances are viable and there is a strong likelihood of financial success.

14. Who will perform the financial accounting for the school (by name) and what are his/her credentials for accounting?

The business manager or management company has not been named at this time but will be named prior to the school opening. The school included a detailed list of roles and responsibilities for the business manager/management company.

15. Please provide a brief summary of other points the State Charter School Board would like the Utah State Board of Education to consider in making the decision to approve the charter school:

Prioritized 6th by the State Charter School Board.

The State Charter School Board approved authorization of this school. While there were initially questions and concerns regarding the CTE and international focus of this school, and unique grade configuration, the applicant satisfactorily answered these questions.

16. Votes of the SCSB in approving the charter school application:

Recommended full approval: Tim Beagley, Dean Brockbank, Robb Enger, Kristin Elinkowski, Howard Headlee, DeLaina Tonks

Not in attendance for vote: Bruce Davis

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**DISCUSSION/ACTION:** USOE Chief Privacy Officer and HB 68 *Student Privacy Study*

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**Background:**
HB 68S04 *Student Privacy Study*, passed in the 2015 Legislative Session, requires the State Board of Education to develop a student privacy funding proposal and make recommendations to the legislature to update student privacy laws on statute and in Board rule. The Board enacted amendments to R277-487 in January 2015 to include a designated "Chief Privacy Officer" with additional data privacy and security improvement requirements.

**Key Points:**
There are several options as to how the Board would like to proceed with review and move forward with the issues of student data privacy.

- Task force
- Committee
- Assign fulfillment of the tasks to the Chief Privacy Officer
- Other

**Anticipated Action:**
It is proposed that the Law and Licensing Committee discuss actions for implementing HB 68S04 and present recommendations to the Board to consider for approval.

**Contact:** Brad C. Smith, 801-538-7510
Judy Park, 801-538-7550

1 **STUDENT PRIVACY STUDY**

2 2015 GENERAL SESSION

3 STATE OF UTAH

4 **Chief Sponsor: Jacob L. Anderegg**

5 Senate Sponsor: Howard A. Stephenson

6

7 **LONG TITLE**

8 **General Description:**

9 This bill requires the State Board of Education to develop a student privacy funding

10 proposal and make recommendations to the Legislature.

11 **Highlighted Provisions:**

12 This bill:

13 ▸ requires the State Board of Education to develop a funding proposal and make

14 recommendations to the Legislature on how the State Board of Education and the

15 Legislature can update student privacy laws in statute and in board rule;

16 ▸ requires the State Board of Education to designate a chief privacy officer; and

17 ▸ requires the State Board of Education and the chief privacy officer to report to the

18 Public Education Appropriations Subcommittee.

19 **Money Appropriated in this Bill:**

20 This bill appropriates in fiscal year 2016:

21 ▸ to the State Board of Education - State Office of Education - Assessment and

22 Accountability, as an ongoing appropriation:

23 • from the Education Fund, $180,000; and

24 ▸ to the State Board of Education - State Office of Education - Assessment and

25 Accountability, as a one-time appropriation:

26 • from the Education Fund, One-time, $5,000.

27 **Other Special Clauses:**

28 This bill provides a special effective date.

29 **Utah Code Sections Affected:**

30 ENACTS:

31 **53A-1-710**, Utah Code Annotated 1953

32

33 *Be it enacted by the Legislature of the state of Utah:*

34 Section 1. Section **53A-1-710** is enacted to read:

35 **53A-1-710. State Board of Education student privacy study -- Chief privacy**

36 **officer.**

37 (1) For purposes of this section:

38 (a) "Board" means the State Board of Education.

39 (b) "Chief privacy officer" means the chief privacy officer designated by the board in

40 Subsection (4).

41 (c) "Education entity" means:

42 (i) the board;

43 (ii) a local school board or charter school governing board;

44 (iii) a school district;

45 (iv) a public school; or

46 (v) the Utah Schools for the Deaf and the Blind.

47 (d) "Third party service provider" means a person, other than an education entity, that:

48 (i) enters into a contract or written agreement with an education entity to provide a

49 service or product; and

50 (ii) receives student data from the education entity pursuant to the contract or written

51 agreement.

52 (2) (a) The board shall develop a funding proposal and make recommendations to the

53 Legislature on how the board and the Legislature can update student privacy laws in statute and

54 in board rule.

55 (b) The board shall consider input from education entities, parents, and other

56 stakeholders as the board develops the funding proposal and recommendations described in

57 Subsection (2)(a).

58 (3) The board shall consider the following issues as the board develops the funding
59 proposal and recommendations described in Subsection (2)(a):
60 (a) how an education entity can better maintain, secure, and safeguard student data,
61 including using industry best practices to maintain, secure, and safeguard the student data;
62 (b) how to provide disclosures to parents and students on how student data will be
63 collected, maintained, and used;
64 (c) the process to release student data to an education entity or to a person, including to
65 the following:
66 (i) another education entity;
67 (ii) a government entity:
68 (A) within the state; or
69 (B) outside of the state; and
70 (iii) a private third party;
71 (d) how to allow a student to expunge the student's data;
72 (e) how to manage a contract with a third party service provider to ensure that a
73 contract entered into between an education entity and a third party service provider includes:
74 (i) provisions requiring specific restrictions on the use of student data;
75 (ii) specific dates governing the destruction of student data given to a third party
76 service provider;
77 (iii) provisions that prohibit a third party service provider from using personally
78 identifiable information for a secondary use, including sales, marketing, or advertising;
79 (iv) provisions limiting a third party service provider's use of student data strictly for
80 the purpose of providing services to the education entity; and
81 (v) provisions requiring a third party service provider to maintain, secure, and
82 safeguard all student data by using industry best practices to maintain, secure, and safeguard
83 the student data; and
84 (f) the penalties for:
85 (i) an unauthorized release of student data; or

86 (ii) failing to maintain, secure, and safeguard student data.
87 (4) (a) The board shall designate a chief privacy officer.
88 (b) The chief privacy officer shall:
89 (i) oversee the administration of student privacy laws; and
90 (ii) work with the board to develop the funding proposal and recommendations
91 described in Subsection (2)(a).
92 (5) On or before January 31, 2016, the board and the chief privacy officer shall present
93 the funding proposal and recommendations described in Subsection (2)(a) to the Public
94 Education Appropriations Subcommittee.
95 Section 2. **Appropriation.**
96 Under the terms and conditions of Title 63J, Chapter 1, Budgetary Procedures Act, for
97 the fiscal year beginning July 1, 2015, and ending June 30, 2016, the following sums of money
98 are appropriated from resources not otherwise appropriated, or reduced from amounts
99 previously appropriated, out of the funds or accounts indicated. These sums of money are in
100 addition to any amounts previously appropriated for fiscal year 2016.
101 To State Board of Education - State Office of Education - Assessment and
102 Accountability
103 From Education Fund $180,000
104 From Education Fund, One-time $5,000
105 Schedule of Programs:
106 Assessment and Accountability $185,000
107 The Legislature intends that:
108 (1) the State Board of Education use the appropriation under this section as described
109 in Section 53A-1-710; and
110 (2) $180,000 of the appropriation under this section be:
111 (a) ongoing; and
112 (b) non-lapsing.
113 Section 3. **Effective date.**

114 (1) Except as provided in Subsection (2), this bill takes effect on May 12, 2015.

115 (2) Uncodified Section 2, Appropriation, takes effect on July 1, 2015.

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** Amendment Request from Freedom Preparatory Academy

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**Background:**
Freedom Preparatory Academy opened in fall 2003 serving a few hundred students in grades K–6. The school's charter agreement was amended to expand to serving 1,220 students in grades K–12. Freedom Preparatory Academy requests to add a satellite campus in Alpine School District in 2016-2017 serving 720 students in grades K–5. The State Charter School Board has reviewed and approved the amendment to the school's charter agreement and forwards it to the State Board of Education for consideration.

**Key Points:**
Freedom Preparatory Academy is a high performing school and has been for several years. The governing board created a strategic plan and studied its enrollment patterns to determine which location would be the best for a satellite campus. The executive summary report is included and additional information submitted by the school can be found at http://schools.utah.gov/charterschools/State-Charter-School-Board/2015-Board-Meetings/March-2015.aspx

**Anticipated Action:**
The Law and Licensing Committee will consider approving Freedom Preparatory Academy Governing Board's request as outlined in the amendment documentation. If approved by the Committee, the Board will consider approving the request

**Contact:** Dr. Marlies Burns, Executive Director, State Charter School Board, 801-538-7817

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

# AMENDMENT
## (Satellite Request)

## Utah State Board of Education
## Charter School Board Executive Summary Report

The Utah State Charter School Board (SCSB) is charged with authorizing, monitoring, evaluating, and dismissing charters of public schools in Utah. Its work is under the direct supervision of the Utah State Board of Education (USBE) per Utah Code 53A-1a-501.5.

This summary report shall be completed by the SCSB and submitted to Brad Smith, State Superintendent of Public Instruction, Utah State Office of Education, two weeks ahead of the regularly scheduled USBE meetings for approval and inclusion in the board's agenda materials. Only that which is in writing, and included in the agenda materials, as ratified for recommendation by the SCSB, shall be considered by the USBE in its final approval process. Attachments, by way of clarification, or elaboration, may be included.

1. Charter School Freedom Preparatory Academy

2. Street Address 1190 West 900 North, Provo Phone 801-437-3100

3. Chief School Officer Daniela Alvarez Phone 801-687-7904

4. The parent charter school is located in which school district? Provo City

   The satellite charter school is located in which school district? Alpine

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

   Daniela Alvarez
   Paul Baltes
   Steven Lord
   Dan Stovall
   Robert Merrill
   Heather Day
   Duane Miller

6. Requested amendment to charter:

   Add satellite campus (Freedom Preparatory Academy #3) in Alpine School District in 2016-2017.

7. a) Summary description of satellite charter school:

   Freedom Preparatory Academy will be entering our 13th year of operation in the fall of 2015. Our school has seen much success since our charter was approved in the spring of 2003.

   The first three years of operation were met with the challenges of growth, space, and school culture development. However, our student population continued to grow. During those first three years of operation we had a population of 350-400 students in grades K-6. During the 2005 school year it was apparent by our wait lists that we needed to expand and utilize the full number of allocated student seats (675). It was at this point that our current location, which was a rented warehouse, became too small.

In the winter of 2005 we purchased an eight acre park which was dilapidated, overgrown, and frequently used by drug dealers and the drifter population. This once beautiful park, which was owned by the Geneva Steel Retirement Association, was now a place that neighbors feared and criminals used for their activities. Freedom Preparatory Academy hired a builder, obtained our own bonding, and in the fall of 2006 we opened the doors of a beautiful 65,000 square foot modern building which added much to the surrounding neighborhood. This same year we also completed our school model by expanding from a K-6 to a K-8.

In 2009 our parents began making requests to the administration and our board to further expand the already successful education model through a high school. In 2010 we were approved to expand from a K-8 to a K-12. At our request we asked the State Charter School Board to allow us to expand our high school program over a four-year period by only adding grade 9 in the 2012-2013 year, grade 10 in the 2013-2014, and so forth until we had a complete K-12 program by the 2015-16 school year. Because of the success of Freedom Preparatory Academy, the charter board approved our proposed increase in student population all in the first year instead of the four-year period and encouraged us to expand more quickly.

Freedom Preparatory Academy has taken our expansion approach methodically and carefully. From the early days we have never rushed into any expanding efforts. We first thoroughly seek out options, study them in detail, execute the decision, and make necessary adjustments along the way.

In the fall of 2013 our secondary program (7th-12th grades) moved to a newly constructed, 60,000 square foot facility a ½ mile from our elementary school. Since our expansion into grades 9-12 we have seen continual and steady growth in student population.

Freedom Preparatory Academy now seeks to expand our successful charter school model within Utah County. With the rapid growth Utah County has experienced over the past several years and the projected explosive growth over the next decade, we want to provide the students an opportunity to attend a Freedom Preparatory Academy campus closer to their home.

It is our belief that through our proven track record of continued high test scores on state and school tests, our focus on success for every child (we are in our third year of being a high performing – high progress Title I school), our strong partnership with parents and the many programs devoted to well rounded, high achieving college ready students, a Freedom Preparatory Academy education will be in high demand in the coming years in Utah Valley.

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

| | | |
|---|---|---|
| 2016-2017 | 355 students | Grades K – 5 |
| 2017-2018 | 405 students | Grades K – 5 |
| 2018-2019 | 540 students | Grades K – 5 |
| 2019-2020 | 610 students | Grades K – 5 |
| 2020-2021 | 655 students | Grades K – 5 |
| 2021-2022 | 700 students | Grades K – 5 |
| 2022-2023 | 720 students | Grades K – 5 |
| Ultimate enrollment | 720 students | Grades K – 5 |

c) The parent school's current configuration is: K – 12

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

e) and f) Percentage of minority and students with disabilities at parent school. How does percentage compare with the local school district? (Data from SY2015 Fall Enrollment Report)

| LEA | District | Enrollment | Minorities | SWD |
|---|---|---|---|---|
| Freedom Preparatory Academy | Provo | 1,144 | 38% | 9% |
| Alpine School District | | 73,570 | 15.8% | 11% |
| Freedom Preparatory Academy #3 | Alpine | 720 | 15% | 11% |

8. What makes this satellite school needed?

The Freedom Preparatory Academy K-12 model has been successful in all areas of state testing, student achievement, student services and parent satisfaction. With a 96% re-enrollment rate this year and wait-lists every year, we find that parents throughout Utah Valley are seeking this model. We have families traveling from Lehi to Payson every single day in order to attend our school when there are plenty of schools, both district and charter, nearer to them. School capacity in surrounding districts reflects numerous schools that are exceeding capacity by 200 students at the present time. They are not ready to receive the projected growth rate of students slated to enter Utah K-12 schools in the next 25 years.

Too often we have parents tell us their friends and family would love to attend our schools for two reasons: 1.) The commute is unmanageable for their family and 2.) They have been on our wait lists for up to four years and believe they will never have a chance of getting in, so they have settled for their neighborhood school and are not happy. Many of these people even attend our big school events and hope that something will change in order for them to have the opportunity of experiencing Freedom Preparatory Academy's outstanding programs.

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

Yes

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

Freedom Preparatory Academy has an outstanding special education department that meets the needs of all students requiring these services. This team will continue the special education program and services as needed per case load at each location.

11. What is the financial position of the parent school?

The school is in a good financial position and review of the governing board's long-term financials indicates the addition of a satellite school is viable.

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

Christopher S. Helvey, M.Ed., Business Manager of Freedom Preparatory Academy.

13. What is the position of the local district regarding the amendment request? Who was the contact at the local district? When was the district provided a copy of the amendment request? (Attachment of letters, if necessary)

Superintendent Vernon Henshaw's office received a complete copy of this amendment request on February 20, 2015. No response has been received to date.

14. What specific conditions or concerns did the SCSB place on the school in order to recommend full approval of this amendment?

None

15. Please provide a brief summary of other points the SCSB would like the Utah State Board of Education to consider in making the decision to approve the amendment.

Freedom Preparatory Academy is a high performing charter school. The school's governing board has a long term strategic plan and plans to implement it appropriately over time. The consistency in board membership and administration adds to the school's success.

16. Votes of the SCSB in approving the charter school application:

| | |
|---|---|
| Recommended full approval | Tim Beagley, Howard Headlee, Dean Brockbank, Bruce Davis, Kristin Elinkowski, DeLaina Tonks |
| Not present for vote | Robert Enger |

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** R277-520 *Appropriate Licensing and Assignment of Teachers* (Continuation and Amendment)

---

**Background:**

1. R277-520 *Appropriate Licensing and Assignment of Teachers* is due for its five-year review and continuation consistent with the Utah Administrative Rulemaking Act. The rule must be continued by July 1, 2015. Staff has reviewed R277-502 and determined that the rule continues to be necessary.
2. The rule has been amended to make it consistent with other current licensure rules.

**Key Points:**

1. The rule continues to be necessary as it defines the licensure requirements for teachers to be considered qualified for funds under R277-486 *Professional Staff Cost Program*
2. The proposed amendment defines the licensure requirements for non-teaching positions.
3. The proposed amendment updates the rule to be consistent with other licensure rules and removes language that is duplicated in other rules.

**Anticipated Action:**

It is proposed that the Law and Licensing Committee consider approving R277-520 for continuation and amendment on first reading and, if approved by the Committee, the Board consider approving R277-520 for continuation and amendment on second reading.

**Contact:** Sydnee Dickson, 801-538-7515
Diana Suddreth, 801-538-7739
Travis Rawlings, 801-538-7601

**R277. Education, Administration.**

**R277-520. Appropriate Licensing and Assignment of Teachers.**

**R277-520-[~~2~~]1. Authority and Purpose.**

A. This rule is authorized by Utah Constitution, Article X, Section 3 which vests general control and supervision of public education in the Board, Section 53A-1-401(3) which gives the Board authority to adopt rules in accordance with its responsibilities, and Section 53A-6-104(2)(a) which authorizes the Board to rank, endorse, or classify licenses. This rule is also necessary in response to ESEA NCLB.

B. The purpose of this rule is to provide criteria for local boards to employ educators in appropriate assignments, for the Board to provide state funding to local school boards for appropriately qualified and assigned staff, and for the Board and local boards to satisfy the requirements of ESEA in order for local boards to receive federal funds.

**R277-520-[~~1~~]2. Definitions.**

A. [~~"At will employment" means employment that may be terminated for any reason or no reason with minimum notice to the employee consistent with the employer's designated payroll cycle.~~]

B. "Board" means the Utah State Board of Education.

[~~C. "Comprehensive Administration of Credentials for Teachers in Utah Schools (CACTUS)" means the electronic file maintained on all licensed Utah educators. The file includes information such as:~~

~~(1) personal directory information;~~

~~(2) educational background;~~

~~(3) endorsements;~~

~~(4) employment history;~~

~~(5) professional development information; and~~

~~(6) a record of disciplinary action taken against the educator.~~]

[~~D. “Composite major” means credits earned in two or more related subjects, as determined by an accredited higher education institution.~~]

E. “Content specialist” means a licensed educator who provides instruction or specialized support for students and teachers in a school setting.

F. “Core academic subjects or areas” means English, reading or language arts, mathematics, science, foreign languages, civics and government, economics, arts, history, and geography under the Elementary and Secondary Education Act (ESEA), also known as the No Child Left Behind Act (NCLB), Title IX, Part A, 20 U.S.C. 7801, Section 9101(11).

G. “Demonstrated competency” means that a teacher shall demonstrate current expertise to teach a specific class or course through the use of lines of evidence which may include completed USOE-approved course work, content test(s), or years of successful experience including evidence of student performance.

H. “Eminence” means distinguished ability in rank, in attainment of superior knowledge and skill in comparison with the generally accepted standards and achievements in the area in which the authorization is sought as provided in R277-520-5.

[~~I. “Highly qualified” means a teacher has met the specific requirements of ESEA, NCLB, Title IX, Part A, 20 U.S.C. 7801, Section 9101(23).~~]

[~~J. J-1 Visa means a visa issued by the U.S. Department of State to an international exchange visitor who has qualified by training and experience to work in U.S. schools for a period not to exceed three years. Such international exchange visitors may qualify for “highly qualified” status under NCLB only if assigned within their subject matter competency.~~]

K. “LEA” means a school district or charter school.

L. “Letter of authorization” means a designation given to an individual for one year, such as an out-of-state candidate or individual pursuing an alternative license, who has not completed the requirements for a Level 1, 2, or 3 license or who has not completed necessary endorsement requirements and who is employed by an [~~school district~~]LEA. [~~A teacher working under a letter of authorization who is not an alternative routes to licensing (ARL) candidate, cannot be designated highly qualified under R277-520-1I.~~]

M. “Level 1 license” means a Utah professional educator license issued upon completion of an approved preparation program or an alternative preparation program, or pursuant to an agreement under the NASDTEC Interstate [~~Contract~~]Agreement, to candidates who have also met all ancillary requirements established by law or rule.

N. “Level 2 license” means a Utah professional educator license issued after satisfaction of all requirements for a Level 1 license [~~as well as completion of Entry Years Enhancements (EYE) for Quality Teaching - Level 1 Utah Teachers, as provided in R277-522, a minimum of three years of successful teaching in a public or accredited private school, and completion of all NCLB requirements at the time the applicant is licensed.~~]and:

(1) satisfaction of requirements under R277-522 for teachers whose employment as a Level 1 licensed educator began after January 1, 2003 in a Utah public LEA or accredited private school;

(2) at least three years of successful education experience in a Utah public LEA or accredited private school or one year of successful education experience in a Utah public LEA or accredited private school and at least three years of successful education experience in a public LEA or accredited private school outside of Utah;

(3) additional requirements established by law or rule.

O. “Level 3 license” means a Utah professional educator license issued to an educator who holds a current Utah Level 2 license and has also received[~~, in the educator's field of practice,~~] National Board certification or a doctorate in education or in a field related to a content area [~~under R277-501-1M from an accredited institution~~]in a unit of the public education system or an accredited private school from an accredited institution, or holds a Speech-Language Pathology area of concentration and has obtained American Speech-Language Hearing Association (ASHA) certification.

P. “License areas of concentration” [~~are~~]means designations to licenses obtained by completing an approved preparation program or an alternative preparation program in a specific area of educational studies such as Early Childhood (K-3), Elementary (K-6), Elementary 1-8, Middle (still valid, but not issued after 1988, 5-9), Secondary (6-12), Administrative/Supervisory (K-12), [~~Applied Technology~~]Career and Technical Education, School Counselor, School Psychologist, School Social Worker, Special Education (K-12), Preschool Special Education (Birth-Age 5), Communication Disorders, Speech-Language Pathologist, and Speech-Language Technician. License areas of concentration may also bear endorsements relating to subjects or specific assignments.

Q. “License endorsement (endorsement)” means a specialty field or area earned through completing required course work [~~equivalent to at least an academic minor (with pedagogy)~~]established by the USOE or through demonstrated competency approved by the USOE; the endorsement shall be listed on the Professional Educator License indicating the specific qualification(s) of the holder.

[~~R. “Major equivalency” means 30 semester hours of USOE and local board-approved postsecondary education credit or CACTUS-recorded professional development in NCLB core academic subjects as appropriate to satisfy NCLB highly qualified~~

~~status.~~]

S. “No Child Left Behind Act (NCLB)” means the federal Elementary and Secondary Education Act, P.L. 107-110, Title IX, Part A, Section 9101(11).

T. “Professional staff cost program funds” means funding provided to school districts based on the percentage of a district's professional staff that is appropriately licensed in the areas in which staff members teach.

[~~U. “State qualified” means that an individual has met the Board-approved requirements to teach core or non-core courses in Utah public schools.~~]

V. “SAEP” means State Approved Endorsement Program. This identifies an educator working on a professional development plan to obtain an endorsement.

W. “USOE” means the Utah State Office of Education.

**R277-520-3. Required Licensing.**

A. All teachers in public schools shall hold a Utah educator license along with appropriate areas of concentration and endorsements.

B. LEAs shall receive assistance from the USOE to the extent of resources available to have all teachers fully licensed.

C. LEAs are expected to hire teachers who are licensed or in the process of becoming fully licensed and endorsed. Failure to ensure that an educator has appropriate licensure [~~consistent with timelines provided in R277-501~~ ]may result in the USOE withholding all LEA funds related to salary supplements under Section 53A-17a-153 and R277-110 and educator quality under Section 53A-17a-107(2) and R277-486 until teachers are appropriately licensed.

**R277-520-4. Appropriate Licenses with Areas of Concentration and Endorsements.**

A. An[~~ early childhood teacher~~]educator assigned to teach a class in [~~(~~]kindergarten through grade 3[~~)~~] shall hold a [~~Level 1, 2, or 3 license~~]current Utah Educator License with an early childhood (k-3), an elementary (k-6), or an elementary (1-8) license area of concentration.

B. An [~~elementary teacher~~]educator assigned to teach a class in [~~(one~~]grade 4 through grade 8[~~)~~] in an elementary setting shall hold a [~~Level 1, 2, or 3 license~~]current Utah Educator License with an elementary (k-6) or an elementary (1-8) license area of concentration.

C. An elementary content specialist in Fine Arts or Physical Education shall hold a [~~Level 1, 2, or 3 license~~]current Utah Educator License with an elementary [~~license area of concentration~~ ]or [~~a~~ ]secondary license area of concentration with the appropriate K-12 [~~subject/~~]content endorsement.

D. An elementary content specialist in reading or English as a Second Language shall hold a [~~Level 1, 2, or 3 license~~]current Utah Educator License with an elementary [~~license area of concentration with the appropriate subject/content endorsement~~] or [~~a~~ ]secondary license area of concentration with the appropriate subject/content endorsement.[~~ Placing a content specialist in a setting out of the specialist's license area of concentration shall be based on exceptional circumstances and in consultation with the USOE.~~]

E. An [~~secondary teacher~~]educator assigned to teach a class in [~~(~~]grade[~~s~~] 6[~~-12)~~] through grade 8, including [~~high school,~~ ]middle-level, intermediate, and junior high schools, shall hold a [~~Level 1, 2, or 3 license~~]current Utah Educator License with an elementary (1-8) or a secondary (6-12) license area of concentration with the appropriate subject/content endorsement[~~s in~~] for all[~~ teaching~~] assign[~~ment(s)~~]ed courses.

F. [~~A teacher with a subject-specific assignment in grades 6, 7 or 8 shall hold a secondary license area of concentration with endorsement(s) for the specific teaching assignment(s) or an elementary license area of concentration with the appropriate subject/content endorsement(s).~~]An educator assigned to teach a class in grade 9 through grade 12 shall hold a current Utah Educator License with a secondary (6-12) or a career and technical education license area of concentration with the appropriate subject/content endorsement for all assigned courses.

*An educator assigned to serve or teach a class of students with disabilities shall hold a current Utah Educator License with a special education (k-12) license area of concentration and, if the educator is the teacher of record of secondary mathematics for students with disabilities, shall also hold the appropriate subject/content endorsement.

G. [~~An elementary (grades 7-8), a secondary or middle-level teacher may be assigned temporarily in a core or non-core academic area for which the teacher is not endorsed if the local board requests and receives a letter of authorization from the Board and the teacher is placed on an approved SAEP.~~]An educator assigned to serve preschool-aged students with disabilities shall hold a current Utah Educator License with a preschool special education (birth-age 5) license area of concentration.

H. [~~Secondary educators with special education areas of concentration may add content endorsement(s) to their educator licenses consistent with R277-520-10 (SAEP).~~]An educator assigned to provide student support services as defined in R277-506 shall hold a current Utah Educator License with the appropriate support service license area of concentration.

I. [~~Educators who have qualified for a J-1 Visa as an international visitor and have provided documentation of holding the equivalent of a bachelors degree, subject content~~

~~mastery, and appropriate work/graduate training may qualify for a Utah Level 1 license. Such temporary visitors may be exempted, at the employer's discretion, from subject content testing, license renewal requirements, and EYE requirements for the duration of their visa eligibility.~~]An educator assigned as a school-based or LEA-based specialist shall hold a current Utah Educator License with the appropriate license area of concentration and endorsement as defined by the LEA.

J. An educator assigned in an administrative position requiring an educator license, as defined by the district, shall hold a current Utah Educator License and an administrative/supervisory (k-12) license area of concentration.

(1) A superintendent of a school district may be licensed with letter of authorization granted by the Board consistent with Section 53A-3-301.

(2) An educator assigned in an administrative position in a charter schools is exempt from this requirement consistent with Section 53A-1a-511.

[~~**R277-520-5. Routes to Utah Educator Licensing.**~~

~~A. In order to receive a license, an educator shall have completed a bachelors degree at an approved higher education institution and:~~

~~(1) completed an approved institution of higher education teacher preparation program in the desired area of concentration; or~~

~~(2) completed an approved alternative preparation for licensing program, under alternative routes to licensing, consistent with R277-503.~~

~~B. An individual may receive a Utah license with an applied technology area of concentration following successful completion of a USOE-approved professional development program for teacher preparation in applied technology education.~~

~~C. An individual may receive a district-specific, competency-based license under Section 53A-6-104.5 and R277-520-8.~~]

**R277-520-[~~6~~]5. Eminence.**

A. The purpose of an eminence authorization is to allow individuals with exceptional training or expertise, consistent with R277-520-1G, to teach or work in the public schools on a limited basis. Documentation of the exceptional training, skill(s) or expertise may be required by the USOE prior to the approval of the eminence authorization.

B. Teachers with an eminence authorization may teach no more than 37 percent of the regular instructional load except as provided in R277-520-6C.

C. In identified circumstances, teachers with an eminence authorization may teach more than 37 percent of the regular instructional load. An eminence authorization may be approved by the Board if:

(1) the LEA can find no other qualified individual to fill the position, then:

(a) the LEA shall submit the following documented information to the USOE annually:

(i) description;

(ii) recruitment efforts;

(iii) the qualifications of all applicants; and

(iv) the LEA’s rationale for hiring the individual.

(b) the USOE shall review the information within 15 days of receipt.

(c) the USOE shall notify the individual and the LEA if the USOE approves the documented information.

(d) the LEA shall submit a request for a Letter of Authorization to the Board for the individual through normal administrative procedures; or

(2) An individual has exceptional skills, expertise, and

experience that make him the primary candidate for the position, then:

(a) the LEA shall submit the following documented information to the USOE annually:

(i) information about the position;

(ii) the individual’s expertise, and experience; and

(iii) the LEA’s rationale for hiring the individual.

(b) the USOE shall review the information within 15 days of receipt.

(c) the USOE shall notify the individual and the LEA if the USOE approves the documented information.

(d) the LEA shall submit a request for a Letter of Authorization to the Board for the individual through normal administrative procedures.

D. LEAs shall require an individual teaching with an eminence authorization to have a criminal background check consistent with Section 53A-3-410(1) prior to employment by the LEA.

E. The LEA that employs the teacher with an eminence authorization shall determine the amount and type of professional development required of the teacher.

F. An LEA that employs teachers with eminence authorizations shall apply for renewal of the authorization(s) annually.

G. Eminence authorizations may apply to individuals without teaching licenses or to unusual and infrequent teacher situations where a license-holder is needed to teach in a subject area for which he is not endorsed, but in which he may be eminently qualified.

[~~**R277-520-7. State Qualified Teachers.**~~

~~A. A teacher has a Utah Level 1, 2 or 3 license or a district-specific competency-based license.~~

~~B. A teacher has an appropriate area of concentration.~~

~~C. A teacher in grades 6-12 has the required endorsement for the course(s) the teacher is teaching by means of:~~

~~(1) an academic teaching major from an accredited postsecondary institution, or a passing score on content test(s) and pedagogy test(s), if available, or USOE-approved pedagogy courses; or~~

~~(2) an academic major or minor from an accredited postsecondary institution; or~~

~~(3) completion of a personal development plan under an SAEP in the appropriate subject area(s) as explained under R277-520-10 with approval from the USOE specialist(s) in the endorsement subject areas.~~

~~D. On an annual basis, local boards/charter school boards shall request letters of authorization for teachers who are teaching classes for which they are not endorsed.~~

~~**R277-520-8. Highly Qualified Teachers.**~~

~~A. A secondary teacher (7-12) is considered highly qualified if the teacher meets the requirements of R277-501-4.~~

~~B. An elementary/early childhood teacher (grades K-8) is considered highly qualified if the teacher meets the requirements of R277-501-5.~~

~~**R277-520-9. School District/Charter School Specific Competency-based Licensed Teachers.**~~

~~A. The following procedures and timelines apply to the employment of educators who have not completed the traditional licensing process under R277-520-5A, B, or C:~~

~~(1) A local board/charter school board may apply to the Board for a school district/charter school specific competency-based license to fill a position in the district.~~

~~(2) The employing school district shall request a school district/charter school specific competency-based license no later than 60 days after the date of the individual's first~~

~~day of employment.~~

~~(3) The application for the school district/charter school specific competency-based license for an individual to teach one or more core academic subjects shall provide documentation of:~~

~~(a) the individual's bachelors degree; and~~

~~(b) for a K-6 grade teacher, the satisfactory results of the rigorous state test including subject knowledge and teaching skills in the required core academic subjects under Section 53A-6-104.5(3)(ii) as approved by the Board; or~~

~~(c) for the teacher in grades 7-12, demonstration of a high Level of competency in each of the core academic subjects in which the teacher teaches by completion of an academic major, a graduate degree, course work equivalent to an undergraduate academic major, advanced certification or credentialing, results or scores of a rigorous state core academic subject test in each of the core academic subjects in which the teacher teaches.~~

~~(4) The application for the school district/charter school specific competency-based license for non-core teachers in grades K-12 shall provide documentation of:~~

~~(a) a bachelors degree, associates degree or skill certification; and~~

~~(b) skills, talents or abilities specific to the teaching assignment, as determined by the local board/charter school board.~~

~~(5) Following receipt of documentation, the USOE shall approve a district/charter school specific competency-based license.~~

~~(6) If an individual employed under a school district/charter school specific competency-based license leaves the district before the end of the employment period, the district shall notify the USOE Licensing Section regarding the end-of-employment date.~~

~~(7) The school district/charter school specific competency-based license for an individual's district/charter school specific competency-based license shall be valid only in the district/charter school that originally requested the school district/charter school specific competency-based license and for the individual originally employed under the school district/charter school specific competency-based license.~~

~~B. The written copy of the state-issued district-specific competency-based license shall prominently state the name of the school district/charter school followed by DISTRICT/CHARTER SCHOOL-SPECIFIC COMPETENCY-BASED LICENSE.~~

~~C. A school district/charter school may change the assignment of a school district/charter school-specific competency-based license holder but notice to USOE shall be required and additional competency-based documentation may be required for the teacher to remain qualified or highly qualified.~~

~~D. School district/charter school specific competency-based license holders are at-will employees consistent with Section 53A-8-106(5).~~]

**R277-520-[~~10~~]6. Routes to Appropriate Endorsements for Teachers.**

[~~Teachers shall be appropriately endorsed for their teaching assignment(s). To be highly qualified:~~

~~A. teachers may obtain the required endorsement(s) with a major or composite major or major equivalency consistent with their teaching assignment(s), including appropriate pedagogical competencies; or~~

~~B. teachers who have satisfactorily completed a minimum of nine semester hours of USOE-approved university level courses may complete a professional development plan under an SAEP in the appropriate subject area(s) with approval from~~

~~USOE Curriculum specialists; or~~]

A. An educator may add an endorsement to an existing license area of concentration by completing the endorsement requirements established by the USOE.

B. Endorsement requirements in core academic subject areas shall include passage of the Board-approved content knowledge assessment.

C. [~~t~~]Teachers may demonstrate competency in the subject area(s) of their teaching assignment(s) as approved by the USOE content area specialist to meet specific endorsement requirements except the Board-approved content knowledge assessment.[~~ In order to be endorsed through demonstrated competency, the educator shall pass designated Board-approved content knowledge and pedagogical knowledge assessments as they become available.~~]

D. [~~Individuals~~]Educators shall be properly endorsed consistent with R277-520-3 or have USOE-approved SAEPs. Otherwise, the Board may withhold professional staff cost program funds.

**R277-520-[~~11~~]7. Board-Approved Endorsement Program (SAEP).**

A. [~~Teachers in any educational program who are assigned to teach out of their area(s) of endorsement~~]An educator assigned to teach in a subject for which he does not hold the appropriate endorsement and who ha[~~ve~~]s [~~at least~~ ]nine semester credit hours of [~~USOE-approved university level courses~~]the endorsement requirements shall [~~participate in~~]be placed on an SAEP[~~ and make satisfactory progress within the period of the SAEP~~] as determined by USOE specialists.[

~~B. The employing school district shall identify teachers who do not meet the state qualified definition and provide a written justification to the USOE.~~]

[~~C~~]B. Individuals participating in SAEPs shall demonstrate progress toward completion of the required

endorsement(s) annually, as determined jointly by the school district/charter school and the USOE.

[~~D~~]C. An SAEP may be granted for one two-year period and may be [~~renewed~~]extended by the USOE[~~, upon written justification from the school district,~~] for [~~one~~]up to two additional [~~two-year period~~]years if the individual has made progress towards completing the SAEP.

D. An individual currently participating in an SAEP is considered to hold the endorsement for the purposes of meeting the requirements of R277-520-4.

**R277-520-[~~12~~]8. Background Check Requirement and Withholding of State Funds for Non-Compliance.**

A. Educators qualified under any provision of this rule shall also satisfy the criminal background requirement of Section 53A-3-410 prior to unsupervised access to students.

B. If LEAs do not appropriately employ and assign teachers consistent with this rule, they may have state appropriated professional staff cost program funds withheld pursuant to R277-486, Professional Staff Cost Formula.

[~~C. Local boards/charter school boards shall report highly qualified educators in core academic subjects and educators who do not meet the requirements of highly qualified educators in core academic subjects beginning July 1, 2003.~~]

**KEY: educator, license, assignment**

**Date of Enactment or Last Substantive Amendment: [~~June 7, 2012~~]2015**

**Notice of Continuation: [~~July 1, 2010~~]2015**

**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-1-401(3); 53A-6-104(2)(a)**

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** R277-502 *Educator Licensing and Data Retention* (Amendment)

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**Background:**
Utah Code 63M-1-3208 requires the State Board of Education to collaborate with the STEM Action Center to develop STEM education endorsements and requires the State Board to make rules to establish how STEM endorsements will be valued on a salary scale for educators.

**Key Points:**
The proposed amendment will clarify R277-502-5-C-1 to more explicitly link STEM endorsement courses to LEA salary schedules.

**Anticipated Action:**
It is proposed that the Law and Licensing Committee consider approving R277-502 *Educator Licensing and Data Retention* as amended on first reading, and if approved by the Committee, the Board consider approving R277-502 on second reading.

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**R277. Education, Administration.**

**R277-502. Educator Licensing and Data Retention.**

**R277-502-[~~2~~]1. Authority and Purpose.**

A. This rule is authorized by Utah Constitution Article X, Section 3 which vests general control and supervision of the public school system under the Board, by Section 53A-6-104 which gives the Board power to issue licenses, and Section 53A-1-401(3) which allows the Board to adopt rules in accordance with its responsibilities.

B. This rule specifies the types of license levels and license areas of concentration available and procedures for obtaining a license, required for employment as a licensed educator in the public schools of Utah. The rule provides a process and criteria for educators whose licenses have lapsed and return to the teaching profession. All licensed educators employed in the Utah public schools shall be licensed consistent with this rule in order for the district to receive full funding under Section 53A-17a-107(2).

**R277-502-[~~1~~]2. Definitions.**

A. "Accredited" means a Board-approved educator preparation program accredited by the National Council for Accreditation of Teacher Education (NCATE), the Teacher Education Accreditation Council (TEAC) or the Council for Accreditation of Educator Preparation (CAEP).

B. "Accredited school" for purposes of this rule, means a public or private school that meets standards essential for the operation of a quality school program and has received formal approval through a regional accrediting association.

C. "Authorized staff" for purposes of this rule means an individual designated by the USOE or an LEA and approved by the USOE and who has completed CACTUS training.

D. "Board" means the Utah State Board of Education.

E. "Comprehensive Administration of Credentials for Teachers in Utah Schools (CACTUS)" means the electronic file maintained on all licensed Utah educators. The file includes information such as:

(1) personal directory information;

(2) educational background;

(3) endorsements;

(4) employment history; and

(5) a record of disciplinary action taken against the educator.

F. “ESEA subject” means English, reading or language arts, mathematics, science, foreign languages, civics and government, economics, arts, history, and geography under the Elementary and Secondary Education Act (ESEA).

G. “LEA” means a local education agency, including local school boards/public school districts, charter schools, and, for purposes of this rule, the Utah Schools for the Deaf and the Blind.

H. “Letter of Authorization” means a designation given to an individual for one year, such as an out-of-state candidate or individual pursuing an alternative license, who has not completed the requirements for a Level 1, 2, or 3 license or who has not completed necessary endorsement requirements and who is employed by an LEA.

I. “Level 1 license” means a Utah professional educator license issued upon completion of a Board-approved educator preparation program or an alternative preparation program, or to an applicant that holds an educator license issued by another state or country that has met all ancillary requirements established by law or rule.

J. “Level 2 license” means a Utah professional educator license issued after satisfaction of all requirements for a Level 1 license and:

(1) satisfaction of requirements under R277-522 for teachers whose employment as a Level 1 licensed educator began after January 1, 2003 in a Utah public LEA or accredited private school;

(2) at least three years of successful education experience in a Utah public LEA or accredited private school or one year of successful education experience in a Utah public LEA or accredited private school and at least three

years of successful education experience in a public LEA or accredited private school outside of Utah;

(3) additional requirements established by law or rule.

K. “Level 3 license” means a Utah professional educator license issued to an educator who holds a current Utah Level 2 license and has also received National Board Certification or a doctorate in education or in a field related to a content area in a unit of the public education system or an accredited private school, or holds a Speech-Language Pathology area of concentration and has obtained American Speech-Language hearing Association (ASHA) certification.

L. “License areas of concentration” means designations to licenses obtained by completing a Board-approved educator preparation program or an alternative preparation program in a specific area of educational studies to include the following: Early Childhood (K-3), Elementary (K-6), Elementary (1-8), Middle (still valid, but not issued after 1988, 5-9), Secondary (6-12), Administrative/Supervisory (K-12), Career and Technical Education, School Counselor, School Psychologist, School Social Worker, Special Education (K-12), Preschool Special Education (Birth-Age 5), Communication Disorders, Speech-Language Pathologist, Speech-Language Technician. License areas of concentration may also bear endorsements relating to subjects or specific assignments.

M. “License endorsement (endorsement)” means a specialty field or area earned through completing required course work established by the USOE or through demonstrated competency approved by the USOE; the endorsement shall be listed on the professional educator license indicating the specific qualification(s) of the holder.

N. “Professional learning plan” means a plan developed by an educator in collaboration with the educator’s supervisor consistent with R277-500 detailing appropriate professional learning activities for the purpose of renewing the educator’s license.

O. “Renewal” means reissuing or extending the length of a license consistent with R277-500.

P. “State Approved Endorsement Program (SAEP)” means a plan in place developed between the USOE and a licensed educator to direct the completion of endorsement requirements by the educator consistent with R277-520-11.

Q. “USOE” means the Utah State Office of Education.

**R277-502-3. Program Approval and Requirements.**

A. The Board [~~shall~~]may accept educator license recommendations from educator preparation programs that have applied for Board approval and have met the requirements described in this rule and the Standards for Program Approval established by the Board in R277-504, R277-505, or R277-506 as determined by USOE.

B. The Board, or its designee, [~~shall~~]may establish deadlines and uniform forms and procedures for all aspects of licensing.

C. To be approved for license recommendation the educator preparation program shall:

(1) be accredited by NCATE or TEAC; or

(2) be accredited by CAEP using the CAEP Program Review with National Recognition or CAEP Program Review with feedback options; and

(3) have a physical location in Utah where students attend classes or if the program provides only online instruction:

(a) the program’s primary headquarters shall be located in Utah and

(b) the program shall be licensed to do business in Utah through the Utah Department of Commerce;

(4) include coursework designed to ensure that the educator is able to meet the Utah Effective Teaching Standards and Educational Leadership Standards established in R277-530;

(5) in the case of content endorsements, include coursework that is, at minimum, equivalent to the course requirements for the endorsement as established by USOE;

(6) establish entry requirements designed to ensure that only high quality individuals enter the licensure program;

requirements shall include the following minimum components, beginning August 1, 2014:

(a) a minimum high school/college GPA of 3.0; and

(b) a USOE-cleared fingerprint background check; and

(c) a passing score on a Board-approved basic skills test; or

(d) an ACT composite score of 21 with a verbal/English score no less than 20 and a mathematics/quantitative score of no less than 19; or

(e) a combined SAT score of 1000 with neither mathematics nor verbal below 450.

(7) include a student teaching or intern experience that meets the requirements detailed in R277-504, R277-505, and R277-506.

D. An institution may waive any of the entrance requirements provided in R277-502-3C(6) based on program established guidelines for no more than 10 percent of an entrance cohort.

E. USOE representatives shall be a part of the accrediting team for any Board-approved educator preparation program seeking to maintain or receive program approval. USOE representatives shall be responsible for:

(1) observing and monitoring the accreditation process;

(2) reviewing subject specific programs to determine if the program meets state standards for licensure in specific areas;

(3) reviewing program procedures to ensure that Board requirements for licensure are followed;

(4) reviewing licensure candidate files to determine if Board requirements for licensure are followed by the program.

F. After completion of the accreditation site visit, a Board-approved educator preparation program, working with the USOE, shall prepare and submit a program approval request for consideration by the Board that includes:

(1) program summary;

(2) accreditation findings;

(3) program areas of distinction;

(4) program enrollment;

(5) program goals and direction.

G. If the program approval request is approved by the Board, the program shall be considered Board-approved until the next scheduled accreditation visit unless the program is placed on probation by the USOE <u>for failure to meet program requirements detailed in applicable Board rules</u> and program approval is revoked by the Board under R277-502-3O.

H. New educator preparation programs that seek Board approval or previously Board-approved educator preparation programs that seek approval for additional license area preparation and endorsements shall submit applications to USOE including:

(1) information detailing the exact license areas of concentration and endorsements that the program intends to award;

(2) detailed course information, including required course lists, course descriptions, and course syllabi for all courses that will be required as part of a program;

(3) detailed information showing how the required coursework will ensure that the educator satisfies all standards in the Utah Effective Teaching Standards and Educational Leadership Standards established in R277-530 and Professional Educator Standards established in R277-515;

(4) information about program timelines and anticipated enrollment.

I. Applications for new educator preparation programs shall be approved by the Board.

J. Applications for previously Board-approved educator preparation programs desiring Board approval for additional license areas and endorsements:

(1) shall be reviewed and approved by USOE;

(2) may receive preliminary approval pending Utah State Board of Regents approval of the new program if the program is within a public institution.

K. An educator preparation program seeking accreditation may apply to the Board for probationary approval for a maximum

221 of three years contingent on the completion of the
222 accreditation process.
223 L. A previously Board-approved educator preparation
224 program shall submit an annual report to the USOE by July 1 of
225 each year. The report shall summarize the institution's
226 annual accreditation report and shall include the following:
227 (1) student enrollment counts designated by anticipated
228 license area of concentration and endorsement and
229 disaggregated by gender and ethnicity;
230 (2) information explaining any significant changes to
231 course requirements or course content;
232 (3) the program's response to USOE-identified areas of
233 concern or areas of focus;
234 (4) information regarding any program-determined areas of
235 concern or areas of focus and the program's planned response;
236 (5) a summary explanation of students admitted under the
237 waiver identified in R277-502-3D and an explanation of the
238 waiver.
239 M. The USOE shall provide reporting criteria to Board-
240 approved educator preparation programs regarding the annual
241 report and USOE-designated areas of concern or focus by
242 January 31 annually.
243 N. Educator preparation programs that submit inadequate
244 or incomplete information to the USOE may be placed on a
245 probationary status by USOE.
246 O. Board-approved educator preparation programs on
247 probationary status that continue to fail to meet requirements
248 may have their license recommendation status revoked in full
249 or in part by the Board with at least one year notice.
250 P. An individual that completes a Board-approved educator
251 preparation program may be recommended for licensure within
252 five years of program completion if the individual meets
253 current licensing requirements.
254 Q. If five years have passed since an individual
255 completed a Board-approved preparation program, the individual
256 may be recommended for licensure following review by the
257 individual program. The preparation program officials shall

258 determine whether any content or pedagogy coursework
259 previously completed meets current program standards and if
260 additional coursework, hours or other activities are
261 necessary. The individual shall complete all work required by
262 the program officials before receiving a license
263 recommendation.

264 **R277-502-4. License Levels, Procedures, and Periods of**
265 **Validity.**
266 A. Level 1 License Requirements
267 (1) An initial license, the Level 1 license, is issued to
268 an individual who is recommended by a Board-approved educator
269 preparation program or approved alternative preparation
270 program, or an educator with a professional educator license
271 from another state.
272 (a) LEAs and Board-approved educator preparation programs
273 shall cooperate in preparing candidates for the educator Level
274 1 license. The resources of both may be used to assist
275 candidates in preparation for licensing.
276 (b) The recommendation indicates that the individual has
277 satisfactorily completed the programs of study required for
278 the preparation of educators and has met licensing standards
279 in the license areas of concentration for which the individual
280 is recommended.
281 (2) The Level 1 license is issued for three years.
282 (3) A Level 1 license holder shall satisfy all
283 requirements of R277-522, Entry Years Enhancements (EYE) for
284 Quality Teaching - Level 1 Utah Teachers.
285 (4) An educator qualified to teach any ESEA subject shall
286 be considered Highly Qualified in at least one ESEA subject
287 prior to moving from Level 1 to Level 2.
288 (5) A license applicant who has received or completed
289 license preparation activities or coursework inconsistent with
290 this rule may present compelling information and documentation
291 for review and approval by the USOE to satisfy the licensing
292 requirements.
293 (6) If an educator has taught for three years in a K-12

public education system in Utah, a Level 1 license may only be renewed if:

(a) the employing LEA has requested a one year extension consistent with R277-522, Entry Years Enhancements (EYE) for Quality Teaching - Level 1 Utah Teachers; or

(b) the individual has continuous experience as a speech language pathologist in a clinical setting.

B. Level 2 License Requirements

(1) A Level 2 license may be issued by the Board to a Level 1 license holder upon satisfaction of all USOE requirements for the Level 2 license and upon the recommendation of the employing LEA.

(2) The recommendation shall be made following the completion of three years of successful, professional growth and educator experience, satisfaction of R277-522, Entry Years Enhancements (EYE) for Quality Teaching - Level 1 Utah Teachers, any additional requirements imposed by the employing LEA, and before the Level 1 license expires.

(3) A Level 2 license shall be issued for five years and shall be valid unless suspended or revoked for cause by the Board.

(4) The Level 2 license may be renewed for successive five year periods consistent with R277-500, Educator Licensing Renewal.

C. Level 3 License Requirements

(1) A Level 3 license may be issued by the Board to a Level 2 license holder who:

(a) has achieved National Board Certification; or

(b) has a doctorate in education in a field related to a content area in a unit of the public education system or an accredited private school; or

(c) holds a Speech-Language Pathology area of concentration and has obtained American Speech-Language Hearing Association (ASHA) certification.

(2) A Level 3 license is valid for seven years unless suspended or revoked for cause by the Board.

(3) The Level 3 license may be renewed for successive

seven year periods consistent with R277-500.

(4) A Level 3 license shall revert to a Level 2 license if the holder fails to maintain National Board Certification status or fails to maintain a current Certificate of Clinical Competence from the American Speech-Language-Hearing Association.

D. License Renewal Timeline

Licenses expire on June 30 of the year of expiration recorded on CACTUS and may be renewed any time after January of the same year. Responsibility for license renewal rests solely with the holder.

**R277-502-5. Professional Educator License Areas of Concentration, and Endorsements and Under-Qualified Employees.**

A. Unless excepted under rules of the Board, to be employed in the public schools in a capacity covered by the following license areas of concentration, a person shall hold a valid license issued by the Board in the respective license areas of concentration:

(1) Early Childhood (K-3);

(2) Elementary (1-8);

(3) Elementary (K-6);

(4) Middle (still valid, and issued before 1988, 5-9);

(5) Secondary (6-12);

(6) Administrative/Supervisory (K-12);

(7) Career and Technical Education;

(8) School Counselor;

(9) School Psychologist;

(10) School Social Worker;

(11) Special Education (K-12);

(12) Preschool Special Education (Birth-Age 5);

(13) Communication Disorders;

(14) Speech-Language Pathologist;

(15) Speech-Language Technician.

B. Under-qualified educators:

(1) Educators who are licensed and hold the appropriate license area of concentration but who are working out of their

endorsement area(s) shall request and prepare an SAEP to complete the requirements of an endorsement with a USOE education specialist; or

(2) LEAs may request Letters of Authorization from the Board for educators employed by LEAs if educators have not completed requirements for areas of concentration or endorsements.

(a) An approved Letter of Authorization is valid for one year.

(b) Educators may be approved for no more than three Letters of Authorization throughout their employment in Utah schools. The State Superintendent of Public Instruction or designee may grant exceptions to the three Letters of Authorization limitation on a case by case basis following specific approval of the request by the LEA governing board. Letters of Authorization approved prior to the 2000-2001 school year shall not be counted in this limit.

(c) If an education employee's Letter of Authorization expires before the individual is approved for licensing, the employee falls into under-qualified status.

C. License areas of concentration may be endorsed to indicate qualification in a subject or content area.

(1) [~~LEAs shall recognize a STEM endorsement as a component of the LEA's salary scale.~~]A STEM endorsement shall be recognized as a minimum of 16 semester hours of university credit toward lane change on an LEA salary schedule.

(a) The USOE shall determine the mathematics-, engineering-, science-, and technology-related courses and experiences necessary for [~~the~~]STEM endorsements.

(b) The USOE shall determine which content area endorsements qualify as STEM endorsements.

(2) An endorsement is not valid for employment purposes without a current license and license area of concentration.

**R277-502-6. Returning Educator Relicensure.**

A. A previously licensed educator with an expired license may renew an expired license upon satisfaction of the

following:

(1) Completion of criminal background check including review of any criminal offenses and clearance by the Utah Professional Practices Advisory Commission;

(2) Employment by an LEA;

(3) Completion of a one-year professional learning plan developed jointly by the school principal or charter school director and the returning educator consistent with R277-500 that also considers the following:

(a) previous successful public school teaching experience;

(b) formal educational preparation;

(c) period of time between last public teaching experience and the present;

(d) school goals for student achievement within the employing school and the educator’s role in accomplishing those goals;

(e) returning educator’s professional abilities, as determined by a formal discussion and observation process completed within the first 30 days of employment; and

(f) completion of additional necessary professional development for the educator, as determined jointly by the principal/school and educator.

(4) Filing of the professional development plan within 30 days of hire;

(5) Successful completion of required Board-approved exams for licensure;

(6) Satisfactory experience as determined by the LEA with a trained mentor; and

(7) Submission to the USOE of the completed and signed Return to Original License Level Application, available on the USOE website prior to June 30 of the school year in which the educator seeks to return.

B. The Professional Learning Plan is independent of the License Renewal Point requirements in R277-500-3C.

C. Returning educators who previously held a Level 2 or Level 3 license shall be issued a Level 1 license during the

first year of employment. Upon completion of the requirements listed in R277-502-6A and a satisfactory LEA evaluation, the employing LEA may recommend the educator's return to Level 2 or Level 3 licensure.

D. Returning educators who taught less than three consecutive years in a public or accredited private school shall complete the Early Years Enhancement requirements before moving from Level 1 to Level 2 licensure.

**R277-502-7. Professional Educator License Reciprocity.**

A. Utah is a member of the Compact for Interstate Qualification of Educational Personnel under Section 53A-6-201.

B. A Level 1 license may be issued to an individual holding a professional educator license in another state who has completed preparation equivalent to Board-approved standards and who has completed Board-approved testing, as required by R277-503-3.

(1) If the applicant has three or more continuous years of previous educator experience in a public or accredited private school, a Level 2 license may be issued upon the recommendation of the employing Utah LEA after at least one year.

(2) If the applicant has less than three years of previous educator experience in a public or accredited private school, a Level 2 license may be issued following satisfaction of the requirements of R277-522, Entry Years Enhancements (EYE) for Quality Teaching - Level 1 Utah Teachers.

**R277-502-8. Professional Educator License Fees.**

A. The Board [~~shall~~]may establish a fee schedule for the issuance and renewal of licenses and endorsements consistent with 53A-6-105. All endorsements to which the applicant is entitled may be issued or renewed with the same expiration date for one licensing fee.

B. A fee may be charged for a valid license to be reprinted or for an endorsement to be added.

C. All costs for testing, evaluation, and course work shall be borne by the applicant unless other arrangements are agreed to in advance by the employing LEA.

D. Costs to review nonresident educator applications may exceed the cost to review resident applications due to the following:

(1) The review is necessary to ensure that nonresident applicants' training satisfies Utah's course and curriculum standards.

(2) The review of nonresident licensing applications is time consuming and potentially labor intensive.

E. Differentiated fees may be set consistent with the time and resources required to adequately review all applicants for educator licenses.

**KEY: professional competency, educator licensing**
**Date of Enactment or Last Substantive Amendment: [~~October 9, 2014~~]2015**
**Notice of Continuation: August 14, 2012**
**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-6-104; 53A-1-401(3)**

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2014

**ACTION**: R277-410 *Accreditation of Schools* (Amendment and Continuation)

---

**Background:**
Recent changes in accreditation procedures are not currently reflected in Board rule. In addition to the amendments to R277-410, the rule is continued consistent with Board policy for continuation of rules and the Utah Administrative Rulemaking Act.

**Key Points:**
R277-410 continues to be necessary because it provides accreditation procedures and responsibilities for public schools.

**Anticipated Action:**
It is proposed that the Law and Licensing Committee consider approving R277-410 for continuation and amendment on first reading, and if approved by the Committee, the Board consider approving R277-410 for continuation and amendment on second reading.

**Contact:** Sydnee Dickson, 801-538-7515

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

**R277. Education, Administration.**

**R277-410. Accreditation of Schools.**

**R277-410-[~~2~~]1. Authority and Purpose.**

A. This rule is authorized under Utah Constitution Article X, Section 3 which vests general control and supervision of public education in the Board, by Section 53A-1-402(1)(c)(i) which directs the Board to adopt rules for school accreditation, and Section 53A-1-401(3) which allows the Board to adopt rules in accordance with its responsibilities.

B. The purpose of this rule is to specify accreditation procedures and responsibility for public schools for which accreditation is required or sought voluntarily and for nonpublic schools which voluntarily request AdvancED Northwest accreditation.

**R277-410-[~~1~~]2. Definitions.**

A. "Accreditation" means the formal process for internal and external review and approval under the Standards for the Northwest Accreditation Commission, a division of Advance Education Inc., (AdvancED).

B. "AdvancED" means the provider of accreditation services based on standards, student performance and stakeholder involvement and is a nonprofit resource offering school improvement and accreditation services to education providers.

C. "Board" means the Utah State Board of Education.

D. "Elementary school" for the purpose of this rule means grades no higher than grade 6.

E. "Junior high school" for purposes of this rule means grades 7 through 9.

F. "Middle school" for the purpose of this rule means grades no lower than grade 5 and no higher than grade 8 in any combination.

G. "Northwest" means the Northwest Accreditation Commission, the regional accrediting association of which Utah is a member. Northwest is an accreditation division of

AdvancED.

H. “Secondary school” for the purpose of this rule means a school that includes grades 9-12 that offers credits toward high school graduation or diplomas or both in whatever kind of school the grade levels exist.

I. “State Council” means the State Accreditation Council, which is composed of 15- 20 public school administrators, school district personnel, private and special purpose school representatives, and USOE personnel. The members are selected to provide statewide representation and volunteer their time and service.

J. “USOE” means the Utah State Office of Education.

**R277-410-3. Accreditation of Public Schools.**

A. The USOE has responsibility to facilitate accreditation by the Board for Utah public schools. The Board is not responsible for the accreditation of nonpublic schools, including private, parochial, or other independent schools.

B. Utah public secondary schools, as defined in R277-410-1H and consistent with R277-481-3A(2), shall be members of AdvancED Northwest and be accredited by AdvancED Northwest.

C. Utah public elementary and middle schools that desire accreditation shall be members of AdvancED Northwest and meet the requirements of R277-410-5 and R277-410-6. AdvancED Northwest accreditation is optional for Utah elementary and middle schools.

D. All AdvancED Northwest accredited schools shall complete and file reports in accordance with AdvancED Northwest protocols.

E. If a school includes grade levels for which accreditation is both mandatory and optional, the school shall be accredited in its entirety.

**R277-410-4. Accreditation Status; Reports.**

A. The Board accepts the AdvancED Northwest Standards for Quality Schools as the basis for its accreditation

standards for school accreditation.

B. The Board requires Utah public schools seeking accreditation to satisfy additional specific Utah assurances in addition to required AdvancED Northwest standards.

C. A school shall complete reports as required by AdvancED Northwest and submit the report to the appropriate recipients.

D. A school shall have a complete school evaluation and site visit at least once every five years to maintain its accreditation.

E. The USOE may require on-site visits as often as necessary when it receives notice of accreditation problems, as determined by the USOE, AdvancED Northwest, or its State Council.

F. The school's accreditation status is recommended by the State Council following a review of the report of the school's External Review. Final approval of the status is determined by the AdvancED Commission and approved by the Board.

**R277-410-5. Accreditation Procedures.**

A. The evaluation of secondary schools for the purpose of accreditation is a cooperative activity in which the school, the school district, the USOE, and AdvancED Northwest share responsibilities. A school's internal review, development, and implementation of a school improvement plan are crucial steps toward accreditation.

B. A school seeking AdvancED Northwest accreditation for the first time shall submit a membership application to AdvancED. The accepted application shall be forwarded to the AdvancED [~~State~~]Managing Office Director.

(1) If a school’s application for membership is accepted by AdvancED, ]~~the school is granted provisional accreditation status for two years and shall have an accreditation visit in year three of the school’s operation~~]an on-site Readiness Review shall be scheduled through the Utah AdvancED Managing Office. Upon successful completion of the Readiness Review,

the school shall become a candidate for accreditation. Candidate schools are not accredited until such status is officially granted.

(2) A school may remain in candidacy for no more than two years prior to hosting an External Review Team accreditation visit. The External Review Team shall be staffed with [~~A school may request an accreditation visit prior to year three if the school has sufficient student and financial data.~~

~~(2) Following a visit by~~] at least two qualified educators verifying a school's compliance with accreditation standards. Following [~~and~~ ]approval by both the Utah AdvancED Council and the AdvancED Commission, the school shall[~~then~~] receive accreditation. A school may request an External Review accreditation visit prior to year two if the school has sufficient student and financial data.

C. AdvancED Northwest accredited schools shall be subject to:

(1) compliance with AdvancED Northwest membership requirements;

(2) satisfactory review by the AdvancED State Council, AdvancED Northwest Commission and Board approval;

(3) a site visit at least every five years by an external review team to review the internal review materials, visit classes, and talk with staff and students as follows:

(a) The external review team shall present its finding in the form of a written report in a timely manner. The report shall be provided to the school, school district superintendent or local charter board chair, and other appropriate parties.

(b) AdvancED staff shall review the external review team report, and consult with the Utah AdvancED[~~State~~] Council. [~~and t~~]The AdvancED Commission shall grant accreditation status if appropriate.

D. Following review and acceptance, accreditation external review team reports are public information and are available upon request.

**R277-410-6. Elementary School Accreditation.**

A. Elementary schools desiring accreditation shall be members of AdvancED Northwest and meet the standards required for such accreditation as outlined in this rule.

B. The accreditation of Utah elementary schools is optional; interested elementary schools may apply to AdvancED Northwest for accreditation.

C. Accreditation shall take place under the direction of AdvancED Northwest.

**R277-410-7. Junior High and Middle School Accreditation.**

A. Junior high and middle schools desiring accreditation shall be members of AdvancED Northwest and meet the standards required for such accreditation as outlined in this rule.

B. The accreditation of Utah middle schools is optional; interested middle schools may apply to AdvancED Northwest for accreditation.

C. Public junior high and middle schools that include grade 9 shall be members of AdvancED Northwest and be visited and assigned status by Advanc[~~ed~~]ED Northwest.

D. The AdvancED Northwest accreditation standards provided in this rule are applicable to junior high and middle schools in their entirety if the schools include grade 9 consistent with R277-410-6C.

**R277-410-8. Board Accreditation Standards.**

A. Board accreditation standards include AdvancED Standards for Quality Schools and Utah-specific requirements. Each standard requires the school to respond to a series of indicator statements and provide evidence of compliance as directed.

[~~B. AdvancED Standards for Quality Schools.~~

~~(1) Purpose and Direction~~

~~(2) Governance and Leadership~~

~~(3) Teaching and Assessing for Learning~~

~~(4) Resources and Support Systems~~

~~(5) Using Results for Continuous Improvement~~]

[~~C~~]B. Utah-specific assurances include essential information sought from schools to demonstrate alignment with Utah law and Board rules. Utah-specific assurances are available from the USOE Teaching and Learning Section.

**R277-410-9. Transfer or Acceptance of Credit.**

A. Utah public schools shall accept transfer credits from accredited secondary schools consistent with R277-705-3.

B. Utah public schools may accept transfer credits from other credit sources consistent with R277-705-3.

**KEY: accreditation, public schools, nonpublic schools**
**Date of Enactment or Last Substantive Amendment: [~~June 9, 2014~~]2015**
**Notice of Continuation: [~~August 1, 2012~~]2015**
**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-1-402(1)(c); 53A-1-401(3)**

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** *R277-419-6 Pupil Accounting – High School Completion Status* (Amendment)

---

**Background:**
Each year the Utah State Office of Education (USOE) calculates graduation rates for each of Utah's public high schools following federal law, state law, board rule, and general policy. Federal reporting requirements indicate that a student may be included in only one school's graduation rate calculation. However, it does not address how to pick a school when the student attended multiple schools in their final year. USOE followed general policy to create a hierarchy of tie-breaking rules that allow the selection of a single school. The amendment would change the tie-breaking rules from general policy to Board rule.

**Key Points:**

- Language is added to clarify the process to assign a student to a single school for graduation when the student was enrolled in one or more schools during the student's last year.
- Sets deadline for final exit status submission and with conditions for schools with alternative year schedules.
- Removes the requirement for calculating a three-year cohort graduation calculation.

**Anticipated Action:**
It is proposed that the Law and Licensing Committee consider approving R277-419-6, as amended, on first reading and, if approved by the Committee, the Board consider approving R277-419-6, as amended, on second reading.

**Contact:** Judy Park, 801-538-7550
Aaron Brough, 801-538-7922

**R277. Education, Administration.**

**R277-419. Pupil Accounting.**

**R277-419-6. High School Completion Status.**

A. The final status of all students who enter high school (grades 10-12) shall be accounted for, whether they graduate or leave high school for other reasons. LEAs shall use the following decision rules to indicate the high school completion or exit status of each student who leaves the Utah public education system:

(1) Graduates are students who earn a basic high school diploma by satisfying one of the options consistent with R277-705-4B or out-of-school youths of school age who complete adult education secondary diploma requirements consistent with R277-733.

(2) Other students are completers who have not satisfied Utah's requirements for graduation but who:

(a) shall be in membership in twelfth grade on the last day of the school year; and

(b) meet any additional criteria established by the LEA consistent with its authority under R277-705-4C; or

(c) meet any criteria established for special education students under Utah State Board of Education Special Education Rules, Revised, August 2007, and available from the USOE, and R277-700-8E; or

(d) pass a General Educational Development (GED) test with a designated score.

(3) Continuing students are students who:

(a) transfer to higher education, without first obtaining a diploma; or

(b) transfer to the Utah Center for Assistive Technology (UCAT) without first obtaining a diploma; or

(c) age out of special education.

(4) Dropouts are students who have no legitimate reason for departure or absence from school or who:

(a) withdraw due to a situation so serious that educational services cannot be continued even under the conditions of R277-419-5A(1)(f)(ii); or

(b) are expelled and do not re-enroll in another public education institution; or

(c) transfer to adult education.

(5) Students shall be excluded from the cohort calculation if they:

(a) transfer out of state, out of the country, to a private school, or to home schooling; or

(b) are U.S. citizens who enrolled in another country as a foreign exchange student; or

(c) are non-U.S. citizens who enrolled in a Utah public school as a foreign exchange student under Section 53A-2-206 in which case they shall be identified by resident status (J for those with a J-1 visa, F for all others), not by an exit code; or

(d) died.

B. LEAs shall report the high school completion status or exit code of each student to the USOE as specified in Data Clearinghouse documentation.

(1) High School completions status or exit codes for each student are due to the USOE by Year End upload for processing and auditing. The LEA shall have until October 1 pursuant to R277-484-3, Deadlines for Data Submission, following the end of the student's graduating cohort year to submit any further updates of completion status or exit codes; or

(2) LEAs with an alternative school year schedule where all of the students have a summer break in a season other than summer, shall submit the data by the next complete data submission update, as defined in R277-484-3, following their summer break.

C. The USOE shall report a graduation rate for each school, LEA, and the state.

(1) Graduation rates will be calculated in accordance with the No Child Left Behind Act of 2001 (NCLB) and the NCLB High School Graduation Rate: Non-Regulatory Guidance.

(2) A student will be included in a school’s rate if the school was the last school the student attended before their expected graduation date and if the student does not meet any

exclusion rules as stated in R277-419-6A(5). The last school a student attended will be determined by the student's exit dates as reported to Data Clearinghouse.

(a) A student's graduation status will be attributed to the school attended in their final cohort year.

(b) If a student attended two or more schools during their final cohort year, then a tie-breaking logic to select the single school will be used in the following hierarchical order of sequence:

(i) school with an attached graduation status for the final cohort year;

(ii) school with the latest exit date;

(iii) school with the earliest entry date;

(iv) school with the highest total membership;

(v) school of choice;

(vi) school with highest attendance;

(vii) school with highest cumulative GPA.

([~~1~~]3) The four-year cohort rate shall be reported on the annual state reports.

[~~(2) The three-year cohort graduation rate shall be reported separately for high schools on the official state graduation report.~~]

**KEY: education finance, school enrollment**

**Date of Enactment or Last Substantive Amendment: [~~December 8, 2014~~]2015**

**Notice of Continuation: September 14, 2012**

**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-1-401(3); 53A-1-402(1)(e); 53A-1-404(2); 53A-1-301(3)(d); 53A-3-404; 53A-3-410**

# Explanation of Tie-breaking Rules for Graduation Rates

## Overview

Each year Utah's State Office of Education (USOE) calculates graduation rates for each of Utah's public high schools. In calculating these rates USOE follows federal law, state law, board rules, and general USOE policy. Federal reporting requirements indicate that a student may be included in only one schools graduation rate calculation. However, it does not address how to pick a school when the student attended multiple in their final year. USOE created a hierarchy of tie-breaking rules that allow the selection of a single school.

## Tie-breaking Rules

If a student was attending two schools in their final year, a school that submits a High School Graduation Code (HS code) is first considered. Next check is the school the student last exited. If one school has a later exit date, that school is selected. If not, then the first entry date tie-breaker is used and so on down the list of tie-breaking rules until a single record can be selected. The tie-breaking, in order, are as follows:

**Table I: Tie-breaking Rules**

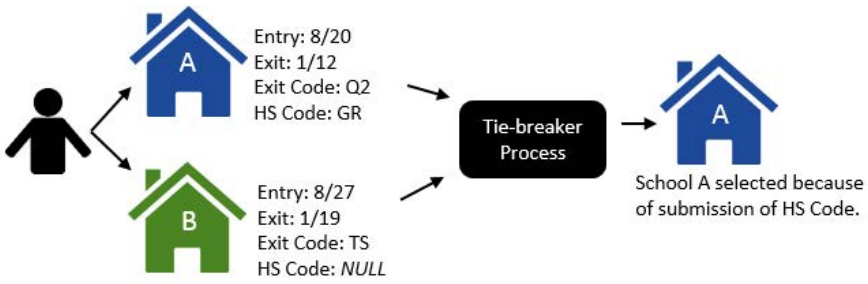
| Current Rules | Percent of Students |
|---|---|
| No Tie-breaker Needed | 88% |
| HS Code Status | 1.8% |
| Last Exit Date | 9.0% |
| Earliest Entry Date | 0.2% |
| Highest Total Membership | 0.9% |
| School of Choice | 0.0% |
| Highest Attendance | 0.0% |
| Highest Cumulative GPA | 0.0% |

## Facts

- Roughly 42,000 students are included in a cohort.
- About 12% of these students attended two schools in their final year.
- For the 2014 cohort, there were 5,545 students who attended two schools in their final year.
  - 1,256 of these students were attending these schools simultaneously at the end of the school year.

## Scenarios

Scenario 1: Attending two schools simultaneously in which one school submitted a High School Graduation Code

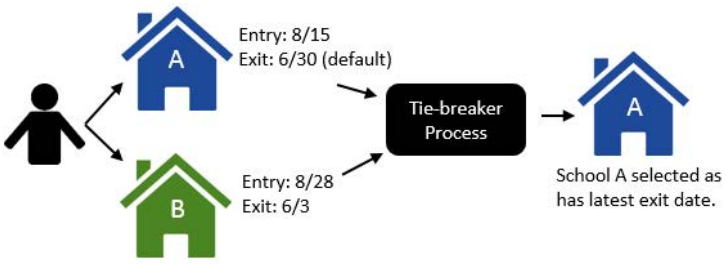



A senior attends SCHOOL A for the first half of the year and graduates early. School A submits a HS Code. The student also attends SCHOOL B during the same time period and is transferred out after the course work is completed. SCHOOL A is selected as the final school because they submitted the student as a graduate.

Scenario 2: Last Exit Date or last know enrollment location

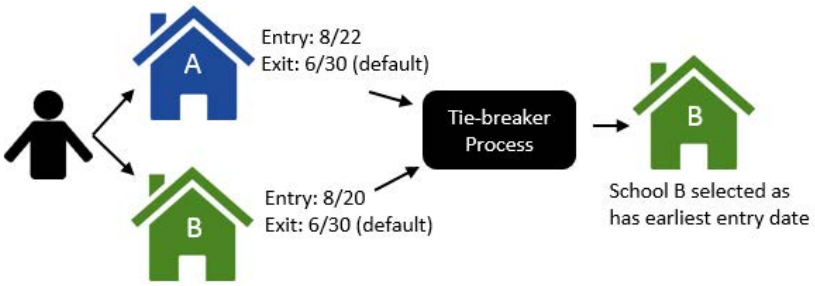
A senior attends SCHOOL A for the first half of the year and then transfers to SCHOOL B. SCHOOL B is selected as the final school as it has the latest exit date.

Scenario 3: Attending two schools simultaneously with different exit dates



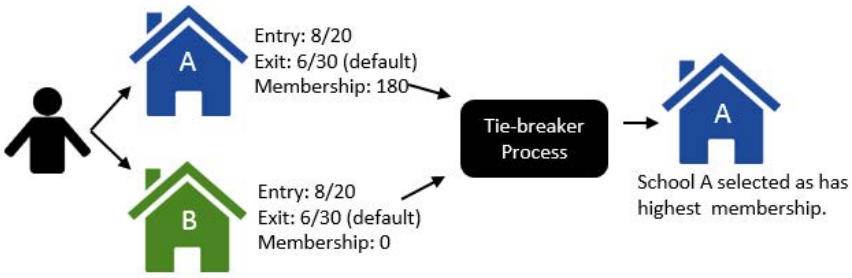
A senior attends SCHOOL A and SCHOOL B through the end of the school year. Nether school send a HS code. SCHOOL A does not give an exit date so the system defaults to June 30th. SCHOOL B exits the student on the last day of coursework, June 3rd. SCHOOL A is selected as the student's final school because it has the last exit date.

Scenario 4: Attending two schools simultaneously with identical exit dates




A senior attends SCHOOL A and SCHOOL B for an entire year. Both schools allow the system to default the exit date to June 30th. As the exit dates are identical, the entry date is then considered. School B is selected as they have the earliest entry date. *If SCHOOL B had manually exited the student on the last day of coursework, the student would have been accredited to SCHOOL A.*

Scenario 5: Attending two schools simultaneously with same exit and entry dates




A senior attends SCHOOL A and SCHOOL B for the entire year. Both schools submit the same entry and exit dates. SCHOOL A is selected as they have the most days of membership.

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**DISCUSSION:** Framework for R277-419-9 *Pupil Accounting - Provisions for Maintaining Student Membership and Enrollment Documentation and Documentation of Student Education Services by Third Party Vendors*

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**Background:** Section 9 of R277-419 was enacted as an emergency rule in school year 2014-2015 to provide guidance to LEAs who claim membership for students enrolled in both traditional and non-traditional schools and programs. Section 9 creates the definition of traditional and nontraditional programs, requires LEAs to develop a continuing enrollment measurement, disallows LEAs from claiming membership for home school courses, disallows LEAs or vendors from using public funds to provide monetary or other incentives for enrollment or referral bonuses to individuals or groups, and outlines minimum documentation and compliance standards for nontraditional programs. The emergency rule expires in May of 2015.

**Key Points:** Section 9 is convoluted and fragmented and staff suggests splitting Section 9 into two new rules as well as dividing some sections into Sections 1-8 of R277-419. For example, new rules could be created to address the following:

- Address the use of public funds for monetary or other incentives for enrollment or referral bonuses (Part F).
- Provide direction for LEAs wishing to establish a nontraditional program, including those that will be contracted out to third parties. This rule should set minimum standards and compliance requirements to qualify for funding through the minimum school program (Parts A-D, G-H, and L-N).
- Definitions found in Section 9 parts A-E and G-H would be more appropriate in section 1.
- The continuing enrollment measurement requirement found in J-K could be rolled into R277-419-5.

**Anticipated Action:**
It is anticipated that the Law and Licensing Committee will discuss modifications to R277-419-9 and instruct staff to develop drafts of new rules.

**Contact:** Angie Stallings, 801-538-7656 Natalie Grange, 801-538-7668

**REPLACED WITH EMERGENCY FILING ONLY UNTIL MAY 15, 2015**

**R277. Education, Administration.**

**R277-419. Pupil Accounting.**

**R277-419-9. Provisions for Maintaining Student Membership and Enrollment Documentation and Documentation of Student Education Services Provided by Third Party Vendors.**

A. R277-419-1 through 8 provide direction for student membership and enrollment and eligibility criteria for both traditional and nontraditional schools and programs.

B. A traditional program is a public school program that consists of eligible enrolled public education students who physically attend school in classrooms.

C. A nontraditional program is a public school program that consists of eligible, enrolled public education students where students primarily receive instruction either online or through a distance learning program.

D. LEAs may enroll students in both traditional and nontraditional programs.

E. Home school courses do not qualify for public education funding for both traditional and non-traditional programs. Home school courses are those where the curriculum and instructional methods, reporting, or evaluation of student progress or mastery is provided or administered by the parent, guardian, custodian, or other group of individuals, not directly supervised by an LEA.

F. LEA and Third Party Vendor Use of Public Funds for Incentives and Reimbursements

(1) LEAs or their third party vendors shall not use public funds, as defined under Section 51-7-3(26), to provide monetary or other incentives for enrollment or referral bonuses to individuals or groups of individuals.

(2) LEAs or their third party vendors shall not use public funds to provide educational, curriculum, instruction, private lessons, or technology reimbursements to individuals, groups of individuals or third party vendors that are not available to all students enrolled in the LEA or required by

an IEP or 504 plan that is approved by the LEA.

(3) LEAs or their third party vendors that purchase items or technology devices and provide them to students shall ensure that these items are the property of the LEAs and are subject to the LEAs asset policies.

(4) LEAs shall establish provisions identified in R277-419-9F(1) through (3) in their contracts with third party vendors and shall monitor compliance with these provisions.

G. LEAs shall ensure school enrollment verification records are collected consistent with sound data collection and storage procedures, established by the LEA, and that these records are transmitted securely. It is the LEAs' responsibility to verify the accuracy and validity of student enrollment records, prior to enrolling students in an LEA, and provide students and their parents with notification of enrollment in a public school. An LEA is the only entity authorized to collect and store public school enrollment verification records including:

(1) birth certificates or other verification of age and identity;

(2) verification of immunization or exemption form;

(3) proof of Utah public school residency;

(4) family income verification; or

(5) special education records, including:

(a) individualized education program;

(b) 504 plan; or

(c) English learner plan.

H. All LEAs that enroll public school students shall maintain documentation of the following:

(1) that the LEA complied with all provisions of R277-419-1 through 8;

(2) that the LEA complied with all educator licensure requirements of R277-502;

(3) that the LEA complied with all fingerprint and background check requirements for educators, employees and

volunteers consistent with Section 53A-3-410, 53A-1a-512.5, R277-516, and R277-520;

(4) that the LEA established a school schedule consistent with R277-419-4A(1);

(5) that the LEA only enrolled students who met the eligibility requirements of R277-419-5A(1) (a-e);

(6) that the LEA directed the instruction of the core curriculum consistent with Section 53A-1-402(1)(a) and R277-700; and

(7) that the LEA scheduled and administered all statewide assessments, as required under Sections 53A-1-606.6 through 53A-1-611 and R277-404.

I. In addition to R277-419-9D, LEAs that enroll students in traditional programs shall also satisfy the requirements of R277-419-5A(1)(f).

J. In addition to R277-419-9D, LEAs that enroll students in nontraditional programs shall also maintain documentation that the LEA satisfied the following:

(1) adopted a written policy that designates a continuing enrollment measurement to document the continuing membership or enrollment status for individual students consistent with R277-419-5A(1)(c);

(2) measured and documented each student’s continued enrollment using the adopted continuing enrollment measurement at least every ten consecutive school days;

(3) documented that LEA employees confirmed students’ continued enrollment consistent with R277-419-9J(2) and updated student membership records in the student information system; and

(4) documented that the LEA adjusted the student membership information for students that did not meet the continuing enrollment measurement, consistent with R277-419-5A(1)(c).

K. The continuing enrollment measurement may include some or all of the following components, in addition to other

components, as determined by the LEA:

(1) a minimum student login or teacher contact requirement;

(2) required periodic contact with a licensed educator;

(3) a minimum hourly requirement, per day or week, when students are engaged in course work; or

(4) required timelines for a student to provide or demonstrate completed assignments, coursework or progress toward academic goals.

L. LEA Nontraditional Program and Third Party Vendor Compliance

(1) An LEA offering a nontraditional program that contracts for curricular and instructional services which are administered by third party vendors shall submit documentation of compliance with law and Board rules (as prescribed by the Board) to the Superintendent’s office for review prior to the initiation of the program.

(2) An LEA offering a nontraditional program that contracts for curricular and instructional services from a third party vendor and does not resolve a corrective action item, may not qualify for some or all Minimum School Program funds.

M. An LEA that contracts with a third party vendor to provide curricular and instructional services to students for nontraditional programs shall monitor and supervise the vendor throughout the administration of the services and ensure compliance, at a minimum, with the following:

(1) all student eligibility and membership/enrollment requirements of R277-419 are met;

(2) all educator licensure requirements of R277-502 are satisfied;

(3) all fingerprint and background check requirements for educators, employees and volunteers, consistent with Section 53A-3-410, 53A-1a-512.5, R277-516, and R277-520, are met;

(4) the Board-directed core standards are used in student

instruction, consistent with Section 53A-1-402(1)(a) and R277-700;

(5) all required statewide assessments are administered by the LEA, as required under Sections 53A-1-606.6 through 53A-1-611 and R277-404;

(6) the LEA has a written supervision plan for the vendor administration of curricular and instructional services; and

(7) the LEA maintains documentation of supervisory activities ensuring compliance with the written supervision plan (copy of the agreement, assignment of supervising personnel by title, meeting notes, correspondence with vendor) consistent with the LEA's administrative records retention schedule.

N. Consistent with R277-114, the Superintendent may withhold funds from traditional or nontraditional public education programs for non-compliance with R277-419. An LEA may appeal the decision of the Superintendent to the Board.

**KEY: education finance, school enrollment**
**Date of Enactment or Last Substantive Amendment: December 8, 2014**
**Notice of Continuation: September 14, 2012**
**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-1-401(3); 53A-1-402(1)(e); 53A-1-404(2); 53A-1-301(3)(d); 53A-3-404; 53A-3-410**

**EMERGENCY FILING**
**EFFECTIVE JANUARY 15, 2015 - EXPIRES MAY 15, 2015**

**R277. Education, Administration.**

**R277-419. Pupil Accounting.**

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D. LEAs may enroll students in both traditional and nontraditional programs.

E. Home school courses do not qualify for public education funding for both traditional and non-traditional programs. Home school courses are those where the curriculum and instructional methods, reporting, or evaluation of student progress or mastery is provided or administered by the parent, guardian, custodian, or other group of individuals, not directly supervised by an LEA.

F. LEA and Third Party Vendor Use of Public Funds for Incentives and Reimbursements

(1) LEAs or their third party vendors shall not use public funds, as defined under Section 51-7-3(26), to provide monetary or other incentives for enrollment or referral bonuses to individuals or groups of individuals.

(2) LEAs or their third party vendors shall not use public funds to provide educational, curriculum, instruction, private lessons, or technology reimbursements to individuals, groups of individuals or third party vendors that are not available to all students enrolled in the LEA or required by

an IEP or 504 plan that is approved by the LEA. This section shall not prohibit an LEA from providing internet reimbursements for students on the K-6 grade level. Furthermore, such internet reimbursement may be provided to students in grades 7-12 if failure to provide such reimbursement will cause economic hardship. This determination should be made in accordance with the fee waiver policy language set forth in R277-407-6.

(3) LEAs or their third party vendors that purchase items or technology devices and provide them to students shall ensure that these items are the property of the LEAs and are subject to the LEAs asset policies.

(4) LEAs shall establish provisions identified in R277-419-9F(1) through (3) in their contracts with third party vendors and shall monitor compliance with these provisions.

G. LEAs shall ensure school enrollment verification records are collected consistent with sound data collection and storage procedures, established by the LEA, and that these records are transmitted securely. It is the LEAs' responsibility to verify the accuracy and validity of student enrollment records, prior to enrolling students in an LEA, and provide students and their parents with notification of enrollment in a public school. An LEA is required by the Board to collect and store public school enrollment verification records including:

(1) birth certificates or other verification of age and identity;

(2) verification of immunization or exemption form;

(3) proof of Utah public school residency;

(4) family income verification; or

(5) special education records, including:

(a) individualized education program;

(b) 504 plan; or

(c) English learner plan.

LEAs may provide written authorization to third party

vendors who meet the definition of school official under 34 CFR 99.31(a)(1)(i)(B) to collect and have access to public school enrollment verification records. In the event that such authorization is provided, parents or guardians of the affected students shall be notified in writing.

H. All LEAs that enroll public school students shall maintain documentation of the following:

(1) that the LEA complied with all provisions of R277-419-1 through 8;

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(3) that the LEA complied with all fingerprint and background check requirements for educators, employees and volunteers consistent with Section 53A-3-410, 53A-1a-512.5, R277-516, and R277-520;

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(5) that the LEA only enrolled students who met the eligibility requirements of R277-419-5A(1) (a-e);

(6) that the LEA directed the instruction of the core curriculum consistent with Section 53A-1-402(1)(a) and R277-700; and

(7) that the LEA scheduled and administered all statewide assessments, as required under Sections 53A-1-606.6 through 53A-1-611 and R277-404.

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J. In addition to R277-419-9D, LEAs that enroll students in nontraditional programs shall also maintain documentation that the LEA satisfied the following:

(1) adopted a written policy that designates a continuing enrollment measurement to document the continuing membership or enrollment status for individual students consistent with R277-419-5A(1)(c);

(2) measured and documented each student's continued enrollment using the adopted continuing enrollment measurement at least every ten consecutive school days;

(3) documented that LEA employees confirmed students' continued enrollment consistent with R277-419-9J(2) and updated student membership records in the student information system; and

(4) documented that the LEA adjusted the student membership information for students that did not meet the continuing enrollment measurement, consistent with R277-419-5A(1)(c).

K. The continuing enrollment measurement may include some or all of the following components, in addition to other components, as determined by the LEA:

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(2) An LEA offering a nontraditional program that contracts for curricular and instructional services from a third party vendor and does not resolve a corrective action item, may not qualify for some or all Minimum School Program funds.

M. An LEA that contracts with a third party vendor to provide curricular and instructional services to students for nontraditional programs shall monitor and supervise the vendor throughout the administration of the services and ensure compliance, at a minimum, with the following:

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(3) all fingerprint and background check requirements for educators, employees and volunteers, consistent with Section 53A-3-410, 53A-1a-512.5, R277-516, and R277-520, are met;

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(5) all required statewide assessments are administered by the LEA, as required under Sections 53A-1-606.6 through 53A-1-611 and R277-404;

(6) the LEA has a written supervision plan for the vendor administration of curricular and instructional services; and

(7) the LEA maintains documentation of supervisory activities ensuring compliance with the written supervision plan (copy of the agreement, assignment of supervising personnel by title, meeting notes, correspondence with vendor) consistent with the LEA's administrative records retention schedule.

N. Consistent with R277-114, the Superintendent may withhold funds from traditional or nontraditional public education programs for non-compliance with R277-419. An LEA may appeal the decision of the Superintendent to the Board.

**KEY: education finance, school enrollment**
**Date of Enactment or Last Substantive Amendment: December 8, 2014**
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**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-1-401(3); 53A-1-402(1)(e); 53A-1-404(2); 53A-1-301(3)(d); 53A-3-404; 53A-3-410**

UTAH STATE BOARD OF EDUCATION

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Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**DISCUSSION/ ACTION:** New Board Rules and Rule Changes Needed as a Result of Legislation

---

**Background:**
The 2015 General Session of the Legislature ended March 12, 2015. Many bills relating to education were passed during the session. It is necessary for the Board to develop new Board rules or make changes to existing rules to be consistent with the legislation passed.

**Key Points:**
Staff will provide a summary of education-related legislation passed during the 2015 Legislative Session and actions required by the Board as a result of that legislation.

**Anticipated Action:**
The Committee will review the list and give direction to staff regarding a timeline for rules to come to the Board and the changes required.

**Contact:** Brad Smith, 801-5387510
Sydnee Dickson, 801-538-7515
Angie Stallings, 801-538-7656

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

| Bill Details | | | | Committee Assignment | | | |
|---|---|---|---|---|---|---|---|
| **NUMBER** | **BILL NAME** | **REP./SEN.** | **SUMMARY** | **Audit** | **Finance** | **S & A** | **L & L** |
| **HB0030** | Math Teacher Training Program Amendments | Edwards | Expands a program allowing a grant to be used to assist experienced math teachers to become teacher leaders. | | | | |
| **HB0033** | American Indian-Alaskan Native Education Amendments | Draxler | Provides for American Indian – Alaskan Native Education State Plan and establishes duties and reporting requirements. | | | | |
| **HB0105 S1** | Antidiscrimination Modifications | Miller | Adds pregnancy, childbirth, and breastfeeding to the Utah Antidiscrimination Act. | | | | |
| **HB0124 S1** | Education Background Check Amendments | Handy | Clarifies and amends background check provisions, requirements, and notifications for LEAs and individuals. | | | | |
| **HB0128** | Maintenance Of Student Records | Froerer | Amends provisions related to a record a school maintains to verify that a parent was notified of certain incidents or threats. | | | | |
| **HB0163** | Student Data Breach Requirements | Knotwell | Requires notification if personally-identifiable student data is breached. | | | | |
| **HB0174, HB0291S3, HB0409S1, SB0121S1** | Procurement Code Amendments | Stratton, Stuart, Snow, Mayne | Requires various modifications to procurement code. | | | | |
| **HB0197 S1** | Educator Licensing Amendments | Coleman | Requires the State Board of Education to make certain rules regarding administrative or supervisory licensing; and makes technical changes | | | | |
| **HB0198** | Strengthening College and Career Readiness | Arent | Creates a program to provide grants to local education agencies for professional development for school counselors. | | | | |
| **HB0203 S1** | Teacher Salary Supplement Program Amendments | Last | Amends provisions related to the Teacher Salary Supplement Program, including the amount of supplement and entity that distributes money for the program. | | | | |
| **HB0213 S2** | Safe Technology Utilization and Digital Citizenship in Public Schools | Stratton | Amends provisions related to educational technology and school community council and expands uses of School LAND Trust Program funds. | | | | |
| **HB0242** | State and Local Government Employee Policies | Miller | Enacts language related to the accommodation of public employees who are breastfeeding. | | | | |
| **HB0282 S1** | Online Education Program Amendments | Daw | Expands the entities that may offer secondary school level and concurrent enrollment courses through the Statewide Online Education Program and authorizes institutions within the state system of higher education to offer secondary school level and concurrent enrollment courses through the Statewide Online Education Program. | | | | |

| Bill Details | | | | Committee Assignment | | | |
|---|---|---|---|---|---|---|---|
| **NUMBER** | **BILL NAME** | **REP./SEN.** | **SUMMARY** | **Audit** | **Finance** | **S & A** | **L & L** |
| **HB0345 S2** | Education Abuse Policy | McCay | Modifies provisions related to school personnel employment and licensing procedures and student abuse reporting. (UPPAC). | | | | |
| **HB0360 S1** | Utah Education Amendments | Christensen | Enacts provisions related to statewide education policy; requires the State Board of Education to: generate a report regarding the history of the state public education system; create a 10-year plan; and report to the Education Interim Committee; removes nonvoting members from the State Board of Education and requires the Board to meet quarterly with certain individuals; amends provisions relating to academic standards established by the Board and curriculum in public schools; provides for education entities to meet certain requirements when establishing certain national programs or standard. | | | | |
| **SB0038** | Behavioral Testing And Tracking Restrictions | Osmond | Eliminates references to behavioral testing or tracking in public schools; and makes technical changes. | | | | |
| **SB0060 S2** | American Civics Education Initiative | Stephenson | Requires an individual to pass the basic civics test as a condition for receiving a high school diploma or adult education secondary diploma. | | | | |
| **SB0204 S2** | Parental Rights In Public Education Amendments | Osmond | Amends provisions related to certain rights of a parent or guardian of a student enrolled in a public school and provisions related to achievement tests. | | | | |
| **SB0235 S2** | School Turnaround and Leadership Development | Niederhauser | Enacts and amends provisions related to turning around low performing schools and developing school leaders. | | | | |
| **SB0245 S1** | School Grading Amendments | Millner | Exempts the USDB from school grading; requires the State Board of Education to annually evaluate the USDB in accordance with an accountability plan approved by the State Board; provides an alternative grade distribution for the 2014-15 school year only; amends provisions related to calculating student growth. | | | | |

**Standards and Assessment Committee**
Board Room

| | | |
|---|---|---|
| | **ACTION:** Release of Grades 6-8 Science Standards Draft for 90-day Public Review | Tab 3-V |
| **Time Certain: 6:00** - | **ACTION:** R277-404 *Requirement for Assessment for Student Achievement* (Amendment) | Tab 3-W |
| | **ACTION:** Release K-5 Library Media Standards Draft for 90-day Public Review | Tab 3-X |
| | **ACTION:** Standards Review Committee Recommendations for Physical Education | Tab 3-Y |
| | **ACTION:** Standards Review Committee Recommendations for Secondary Social Studies | Tab 3-Z |
| | **ACTION:** Standards Review Committee Recommendations for Fine Arts | Tab 3-AA |
| | **INFORMATION:** FFY 2013 IDEA Part B Annual Performance (APR) and State Systemic Improvement Plan (SSIP) | Tab 3-BB |
| | **DISCUSSION/ACTION:** New Board Rules and Rule Changes Needed as a Result of Legislation | Tab 3-CC |

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** Release Grades 6-8 Science Standards Draft for 90-Day Public Review

---

**Background:**
The Utah State Office of Education in collaboration with the Utah science education community (composed of Utah science teachers, Utah district science curriculum specialists, and Utah higher education representatives) has created a revised draft of the Utah Core Science Standards for grades 6-8. The revision is based on addressing concerns about the format of current science standards in multiple documents and presenting a single vision for college and career readiness in science education. The draft responds to feedback from multiple stakeholder groups including parents, teachers, district administrators, university personnel, and the State Board Standards and Assessment committee.

**Key Points:**

- The draft shifts from students memorizing science content to student performance expectations to articulate college and career ready goals for science.
- This draft includes adjustments made to meet the concerns of the Standards and Assessment Committee voiced at its February 5, 2015 committee meeting.

**Anticipated Action:**
The Standards and Assessment Committee will consider approving the release of the draft Grades 6-8 Science Standards for a 90-day public review period.

**Contact:** Sydnee Dickson, 801-538-7794
Diana Suddreth, 801-538-7739
Richard Scott, 801-538-7808

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

# Utah Science and Engineering Education Standards

## UT SEEd Standards

## Draft for Public Review – April 2015

## 6th Grade Integrated Science

### Overview

This document is available as a draft for public feedback. Please utilize the survey tool available online to provide feedback on this document:

https://www.surveymonkey.com/s/SciencePublicReview

Once the 90-Day Public Review has concluded, the teacher writing teams for science grades 6-8 will reconvene to respond to comments and revise the draft accordingly.

Thank you for taking time to provide your feedback and supporting the process of developing science standards that prepare Utah students to be college and career ready.

# Utah Science & Engineering Education Standards

## Sixth Grade Overview

The **Ut**ah **S**cience & **E**ngineering **Ed**ucation (**UT SEEd**) Standards will enable students to use different science practices and concepts in understanding the complex issues surrounding Earth's systems. In Sixth Grade the concepts of patterns, cause and effect, and systems provide students with opportunities to build models, design solutions, and analyze data to understand how the availability of energy and matter affect Earth's systems. Performance expectations are written in such a way as to require students to ask authentic questions and analyze real-world evidence. These practices and experiences will enable learners to have opportunities to arrive at informed conclusions. Combining the delivery of practices, concepts, and content allows a foundational knowledge of energy and matter to be built that furthers scientific literacy.

In the Sixth Grade, matter is investigated at the molecular level and energy is introduced as the force that drives the behavior of matter. This concept is then applied in the context of the natural world as students explore the hydrologic cycle, weather patterns, climate and ecosystems. Additionally, they will explore their own role within the natural world. The integration of practices, concepts, and content will enable students to articulate their understanding of the relationship between matter and energy in Earth's systems. 'Look at the world around them from the perspective of how matter and energy affect the structure and behavior of matter.

## 3 Dimensions of Science Instruction in UT SEEd Standards

**Bold** = 6th Grade Focus

| Scientific and Engineering Practices | Crosscutting Concepts | Disciplinary Core Ideas |
|---|---|---|
| 1. Asking questions or defining problems<br>2. Developing and using models<br>3. Planning and carrying out investigations<br>4. Analyzing and interpreting data<br>5. Using mathematics and computational thinking<br>6. Constructing explanations and designing solutions<br>7. Engaging in argument from evidence<br>8. Obtaining, evaluating, and communicating information | 1. Patterns<br>2. Cause and effect: Mechanism and explanation<br>3. Scale, proportion and quantity<br>4. Systems and system models<br>5. Energy and matter: Flows, cycles and conservation<br>6. Structure and function<br>7. Stability and change | Physical: **matter**, motion, **energy**, waves<br>Life: molecules to organisms, **ecosystems,** heredity, biological evolution<br>Earth: Earth's place in the universe, **Earth's systems, Earth and human activities**<br>Engineering: **Design, links among engineering, tech, science and society** |

DRAFT

# Grade Level Themes/Questions (6th Grade)

## Root Question 1: How does energy affect the structure and behavior of matter?

PERFORMANCE EXPECTATIONS:

- ✓ 6.1.1: Develop models to describe the atomic composition of simple molecules and extended structures.
- ✓ 6.1.2: Develop a model that predicts and describes changes in particle motion, temperature, and state of a pure substance when thermal energy is added or removed.
- ✓ 6.1.3: Construct and interpret graphical displays of data to describe the relationships of kinetic energy to the mass of an object and to the speed of an object.
- ✓ 6.1.4: Apply scientific principles to design, construct, and test a device that either minimizes or maximizes thermal energy transfer.
- ✓ 6.1.5: Define the criteria and constraints of a design problem with sufficient precision to ensure a successful solution, taking into account relevant scientific principles and potential impacts on people and the natural environment that may limit possible solutions.
- ✓ 6.1.6: Analyze data from tests to determine similarities and differences among several design solutions to identify the best characteristics of each that can be combined into a new solution to better meet the criteria for success.
- ✓ 6.1.7: Plan an investigation to determine the relationships among the energy transferred, the type of matter, the mass, and the change in the average kinetic energy of the particles as measured by the temperature of the sample.

## Root Question 2: How do energy and matter move in patterns that affect Earth's weather and climate?

PERFORMANCE EXPECTATIONS:

- ✓ 6.2.1: Develop a model to describe the cycling of water through Earth's systems driven by energy from the sun and the force of gravity.
- ✓ 6.2.2: Collect data to provide evidence for how the motions and complex interactions of air masses results in changes in weather conditions.
- ✓ 6.2.3: Develop and use a model to describe how unequal heating and rotation of the Earth cause patterns of atmospheric and oceanic circulation that determine regional climates.
- ✓ 6.2.4: Ask questions to clarify evidence of the factors that have caused the rise in global temperatures over the past century.

## Root Question 3: How does the availability of energy and matter affect stability and change in ecosystems?

PERFORMANCE EXPECTATIONS:

- ✓ 6.3.1: Analyze and interpret data to provide evidence for the effects of resource availability on organisms and populations of organisms in an ecosystem.
- ✓ 6.3.2: Construct an explanation that predicts patterns of interactions among organisms across multiple ecosystems.
- ✓ 6.3.3: Develop a model to describe the cycling of matter and flow of energy among living and nonliving parts of an ecosystem.
- ✓ 6.3.4: Construct an argument supported by empirical evidence that changes to physical or biological components of an ecosystem affect populations.
- ✓ 6.3.5: Evaluate competing design solutions for maintaining biodiversity and ecosystem services.
- ✓ 6.3.6: Evaluate competing design solutions using a systematic process to determine how well they meet the criteria and constraints of the problem.

## Root Question 4: How can the use of matter and energy affect Earth's systems?

PERFORMANCE EXPECTATIONS:

- ✓ 6.4.1: Apply scientific principles to design a method for monitoring and minimizing a human impact on the environment.
- ✓ 6.4.2: Develop a model to generate data for iterative testing and modification of a proposed object, tool, or process such that an optimal design can be achieved.
- ✓ 6.4.3: Construct an argument supported by evidence for how increases in human population and per-capita consumption of natural resources impact Earth's systems.

DRAFT

# Utah Science and Engineering Education Standards

## UT SEEd Standards

## Draft for Public Review – April 2015

## 7th Grade Integrated Science

### Overview

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Once the 90-Day Public Review has concluded, the teacher writing teams for science grades 6-8 will reconvene to respond to comments and revise the draft accordingly.

Thank you for taking time to provide your feedback and supporting the process of developing science standards that prepare Utah students to be college and career ready.

# Utah Science & Engineering Education Standards

## Seventh Grade Overview

The **Ut**ah **S**cience & **E**ngineering **Ed**ucation (**UT SEEd**) Standards will enable students to use multiple science practices and concepts to understand mechanisms and systems. In Seventh Grade the concepts of patterns across a wide array of scales give students the opportunity to understand cause and effect mechanisms in physical, life, and earth sciences. Performance expectations are written in such a way as to require students to ask authentic questions and analyze real-world evidence. These practices and experiences will enable learners to have opportunities to arrive at and communicate informed arguments. Combining authentic scientific practice and crosscutting concepts across a diversity of disciplinary core ideas gives students the opportunity to cultivate ideas that will be built upon in upper grades and beyond.

In the Seventh Grade, students will consider many sources of data that are not immediately obvious. These include changes that occur over vast amounts of time, such as biological evolution and processes of our planet, so connections between how we understand natural selection, the fossil record, and Earth's dynamics can be made. Students engage in motion and systems at the most hands-on and the grandest levels as they consider force and motions that range from small electrical charges to massive planetary systems. In all cases, students analyze data to craft explanations and models that highlight the cause and effect mechanisms in multiple scientific disciplines.

## 3 Dimensions of Science Instruction in UT SEEd Standards

**Bold** = 7th Grade Focus

| Scientific and Engineering Practices | Crosscutting Concepts | Disciplinary Core Ideas |
|---|---|---|
| 1. Asking questions or defining problems<br>2. Developing and using models<br>3. Planning and carrying out investigations<br>4. Analyzing and interpreting data<br>5. Using mathematics and computational thinking<br>6. Constructing explanations and designing solutions<br>7. Engaging in argument from evidence<br>8. Obtaining, evaluating, and communicating information | 1. Patterns<br>2. Cause and effect: Mechanism and explanation<br>3. Scale, proportion and quantity<br>4. Systems and system models<br>5. Energy and matter: Flows, cycles and conservation<br>6. Structure and function<br>7. Stability and change | Physical: matter, **motion**, energy, waves<br>Life: **molecules to organisms**, ecosystems, **heredity, biological evolution**<br>Earth: **Earth's place in the universe**, **Earth's systems**, Earth and human activities<br>Engineering: **Design, links among engineering, tech, science and society** |

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# Grade Level Themes/Questions (7th Grade)

**Root Question 1:** How does the structure and behaviors of an organism affect its ability to grow, survive, and reproduce?

PERFORMANCE EXPECTATIONS:

- ✓ 7.1.1: Use argument based on empirical evidence and scientific reasoning to support an explanation for how characteristic animal behaviors and specialized plant structures affect the probability of successful reproduction of animals and plants respectively.
- ✓ 7.1.2: Conduct an investigation to provide evidence that living things are made of cells; either one cell or many different numbers and types of cells.
- ✓ 7.1.3: Construct a scientific explanation based on evidence for how environmental and genetic factors influence the growth of organisms.
- ✓ 7.1.4: Develop and use a model to describe why structural changes to genes (mutations) located on chromosomes may affect proteins and may result in harmful, beneficial, or neutral effects to the structure and function of the organism.
- ✓ 7.1.5: Develop and use a model to describe why asexual reproduction results in offspring with identical genetic information and sexual reproduction results in offspring with genetic variation.
- ✓ 7.1.6: Construct an explanation based on evidence that describes how genetic variations of traits in a population increase some individuals' probability of surviving and reproducing in a specific environment.
- ✓ 7.1.7: Gather and synthesize information about the technologies that have changed the way humans influence the inheritance of desired traits in organisms.

**Root Question 2:** What patterns can be observed as evidence to support changes in species over time?

PERFORMANCE EXPECTATIONS:

- ✓ 7.2.1: Analyze and interpret data for patterns in the fossil record that document the existence, diversity, extinction, and change of life forms throughout the history of life on Earth under the assumption that natural laws operate today as in the past.
- ✓ 7.2.2: Analyze displays of pictorial data to compare patterns of similarities in the embryological development across multiple species to identify relationships not evident in the fully formed anatomy.
- ✓ 7.2.3: Use mathematical representations to support explanations of how natural selection may lead to increases and decreases of specific traits in populations over time.
- ✓ 7.2.4: Apply scientific ideas to construct an explanation for the anatomical similarities and difference among modern organisms and between modern and fossil organisms to infer evolutionary relationships.

**Root Question 3:** How does the cycling of matter and energy affect Earth's evolution over time?

PERFORMANCE EXPECTATIONS:

- ✓ 7.3.1: Construct a scientific explanation based on evidence from rock strata for how the geologic time scale is used to organize Earth's 4.6-billion-year-old history.
- ✓ 7.3.2: Develop a model to describe the cycling of Earth's materials and the flow of energy that drives this process.
- ✓ 7.3.3: Construct an explanation based on evidence for how processes have changed Earth's surface at varying time and spatial scales.
- ✓ 7.3.4: Analyze and interpret data on the distribution of fossils and rocks, continental shapes, and seafloor structures to provide evidence of plate motions.

**Root Question 4:** How does gravity influence the structure, organization, and motion of objects in space?

PERFORMANCE EXPECTATIONS:

- ✓ 7.4.1: Develop and use a model of the Earth-sun-moon system to describe the cyclic patterns of lunar phases, eclipses of the sun and moon, and seasons.
- ✓ 7.4.2: Evaluate competing design solutions using a systematic process to determine how well they meet the criteria and constraints of the problem.
- ✓ 7.4.3: Define the criteria and constraints of a design problem with sufficient precision to ensure a successful solution, taking into account relevant scientific principles and potential impacts on people and the natural environment that may limit possible solutions.
- ✓ 7.4.4: Develop and use a model to describe the role of gravity in the motions within galaxies and the solar system.
- ✓ 7.4.5: Analyze and interpret data to determine scale properties of objects in the solar system.

**Root Question 5:** How do forces interact with matter?

PERFORMANCE EXPECTATIONS:

- ✓ 7.5.1: Apply Newton's Third Law to design a solution to a problem involving the motion of two colliding objects.
- ✓ 7.5.2: Develop a model to generate data for iterative testing and modification of a proposed object, tool, or process such that an optimal design can be achieved.
- ✓ 7.5.3: Plan an investigation to provide evidence that the change in an object's motion depends on the sum of the forces on the object and the mass of the object.
- ✓ 7.5.4: Ask questions about data to determine the factors that affect the strength of electric and magnetic forces.
- ✓ 7.5.5: Analyze data from tests to determine similarities and differences among several design solutions to identify the best characteristics of each that can be combined into a new solution to better meet the criteria for success.
- ✓ 7.5.6: Construct and present arguments using evidence to support the claim that gravitational interactions are attractive and depend on the masses of interacting objects.
- ✓ 7.5.7: Conduct an investigation and evaluate the experimental design to provide evidence that fields exist between objects exerting forces on each other even though the objects are not in contact

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# Utah Science and Engineering Education Standards

## UT SEEd Standards

## Draft for Public Review – April 2015

## 8th Grade Integrated Science

### Overview

This document is available as a draft for public feedback. Please utilize the survey tool available online to provide feedback on this document:

https://www.surveymonkey.com/s/SciencePublicReview

Once the 90-Day Public Review has concluded, the teacher writing teams for science grades 6-8 will reconvene to respond to comments and revise the draft accordingly.

Thank you for taking time to provide your feedback and supporting the process of developing science standards that prepare Utah students to be college and career ready.

# Utah Science & Engineering Education Standards

## Eight Grade Overview

The **Ut**ah **S**cience & **E**ngineering **Ed**ucation (**UT SEEd**) Standards will enable students to use different science practices and concepts to understand complex systems of all sizes. In the Eighth Grade, the concepts of patterns, and how scale, proportions, and quantity affect a system's structure or function will be used to create opportunities to build models, design solutions, and analyze data to understand the interaction of energy and matter. Performance expectations are written in such a way as to require students to ask authentic questions and analyze real-world evidence. These practices and experiences will enable learners to have opportunities to arrive at informed conclusions. Combining the delivery of practices, concepts, and content allows a foundational knowledge of energy and matter to be built that furthers scientific literacy.

In the Eighth Grade, the interaction of energy and matter takes center stage. Students will investigate systems and system models of all scales, ranging from natural disasters to complex food webs. Students will also explore and quantify basic systems of force and motion, and how this energy can be stored and transferred between objects.

## 3 Dimensions of Science Instruction in Utah SEEd Standards

**Bold =** 8th Grade Focus

| Scientific and Engineering Practices | Crosscutting Concepts | Disciplinary Core Ideas (bold are 8th grade) |
|---|---|---|
| 1. Asking questions or defining problems<br>2. *Developing and using models*<br>3. Planning and carrying out investigations<br>4. *Analyzing and interpreting data*<br>5. Using mathematics and computational thinking<br>6. *Constructing explanations and designing solutions*<br>7. Engaging in argument from evidence<br>8. Obtaining, evaluating, and communicating information | 1. Patterns<br>2. Cause and effect: Mechanism and explanation<br>3. *Scale, proportion and quantity*<br>4. *Systems and system models*<br>5. *Energy and matter: Flows, cycles and conservation*<br>6. *Structure and function*<br>7. Stability and change | Physical: ***matter***, ***motion***, ***energy***, ***waves***<br>Life: ***molecules to organisms***, ecosystems***,*** heredity, biological evolution<br>Earth: Earth's place in the universe, ***Earth's systems***, Earth and human activities<br>Engineering: ***Design, links among engineering, tech, science and society*** |

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# Grade Level Themes/Questions (8th Grade)

## Root Question 1: How do matter and energy *interact* to form the physical world?

PERFORMANCE EXPECTATIONS:

- ✓ 8.1.1: Develop models to describe the atomic composition of simple molecules and extended structures.
- ✓ 8.1.2: Analyze and interpret data on the properties of substances before and after the substances interact to determine if a chemical reaction has occurred.
- ✓ 8.1.3: Gather and make sense of information to describe that synthetic materials come from natural resources and impact society.
- ✓ 8.1.4: Define the criteria and constraints of a design problem with sufficient precision to ensure a successful solution, taking into account relevant scientific principles and potential impacts on people and the natural environment that may limit possible solutions.
- ✓ 8.1.5: Develop a model that predicts and describes changes in particle motion, temperature, and state of a pure substance when thermal energy is added or removed.
- ✓ 8.1.6: Develop and use a model to describe how the total number of atoms does not change in a chemical reaction and thus mass is conserved.
- ✓ 8.1.7: Undertake a design project to construct, test, and modify a device that either releases or absorbs thermal energy by chemical processes.
- ✓ 8.1.8: Analyze data from tests to determine similarities and differences among several design solutions to identify the best characteristics of each that can be combined into a new solution to better meet the criteria for success.

## Root Question 2: How is energy stored and transferred in physical systems?

PERFORMANCE EXPECTATIONS:

- ✓ 8.2.1: Construct and interpret graphical displays of data to describe the relationships of kinetic energy to the mass of an object and to the speed of an object.
- ✓ 8.2.2: Develop a model to describe that when the arrangement of objects at a distance changes, different amounts of potential energy are stored in the system.
- ✓ 8.2.3: Construct, use, and present arguments to support the claim that when the kinetic energy of an object changes, energy is transferred to or from the object.

## Root Question 3: How is energy carried in waves?

PERFORMANCE EXPECTATIONS:

- ✓ 8.3.1: Use mathematical representations to describe a simple model for waves that includes how the amplitude of a wave is related to the energy in a wave.
- ✓ 8.3.2: Develop and use a model to describe that waves are reflected, absorbed, or transmitted through various materials.
- ✓ 8.3.3: Evaluate competing design solutions using a systematic process to determine how well they meet the criteria and constraints of the problem.
- ✓ 8.3.4: Integrate qualitative scientific and technical information to support the claim that digitized signals are a more reliable way to encode and transmit information than analog signals.

## Root Question 4: How do humans respond to and interact with Earth?

PERFORMANCE EXPECTATIONS:

- ✓ 8.4.1: Construct a scientific explanation based on evidence for how the uneven distributions of Earth's mineral, energy, and groundwater resources are the result of past and current geoscience processes.
- ✓ 8.4.2: Analyze and interpret data on natural hazards to forecast future catastrophic events and inform the development of technologies to mitigate their effects.
- ✓ 8.4.3: Apply scientific principles to design a method for monitoring and minimizing a human impact on the environment.
- ✓ 8.4.4: Develop a model to generate data for iterative testing and modification of a proposed object, tool, or process such that an optimal design can be achieved.
- ✓ 8.4.5: Construct an argument supported by evidence for how changes in human population and per-capita consumption of natural resources impact Earth's systems.

## Root Question 5: How are living things organized?

PERFORMANCE EXPECTATIONS:

- ✓ 8.5.1: Conduct an investigation to provide evidence that living things are made of cells; either one cell or many different numbers and types of cells.
- ✓ 8.5.2: Develop and use a model to describe the function of a cell as a whole and the way parts of cells contribute to the function.
- ✓ 8.5.3: Use argument supported by evidence for how the body is a system of interacting subsystems composed of groups of cells.

## Root Question 6: How is life maintained?

PERFORMANCE EXPECTATIONS:

- ✓ 8.6.1: Use argument based on empirical evidence and scientific reasoning to support an explanation for how characteristic animal behaviors and specialized plant structures affect the probability of successful reproduction of animals and plants respectively.
- ✓ 8.6.2: Construct a scientific explanation based on evidence for the role of photosynthesis in the cycling of matter and flow of energy into and out of organisms.
- ✓ 8.6.3: Develop a model to describe how food is rearranged through chemical reactions forming new molecules that support growth and/or release energy as this matter moves through an organism.
- ✓ 8.6.4: Gather and synthesize information that sensory receptors respond to stimuli by sending messages to the brain for immediate behavior or storage as memories.

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** R277-404 *Requirement for Assessment of Student Achievement* (Amendment)

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**Background:** In its February 19, 2015 meeting, the State Board of Education discussed the issue of parents/guardians excusing students from testing, and Superintendent Brad Smith indicated he would bring information to the March Board meeting to facilitate a Board policy on this issue.

In its March 6, 2015 meeting, the State Board of Education unanimously approved on first reading amendments to R477-404 clarifying parental rights in opting their children out of state assessments mandated by the Board and state statute. The Board requested the rule be brought to the April 9 Standards and Assessment Committee meeting for further discussion and consideration.

In addition, S. B. 204, *Parental Rights in Public Education Amendments* was passed during the 2015 legislative session. The legislation directs the State Board of Education to establish procedures and to maintain and publish a list of state assessments, state assessment systems, and software that qualify under the statute.

**Key Points:** Board rule R277-404 has been amended to address Board and legislative concerns. The rule is amended to clarify parental rights in regards to excusing students from testing. In addition to the rule and the statute, the following information has been provided as background to the Board discussion and action:

1. 2013-14 SAGE Parental Exclusion Report
2. State by State Comparisons of Exclusion Rules
3. Utah Assessment Schedule
4. Assessment Information

**Anticipated Action:** USOE staff will be prepared to answer questions and provide information as needed. The Committee will consider approving amendments to R277-404 on second reading, and if approved, the Board will consider approving the rule on third and final reading.

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**R277. Education, Administration.**

**R277-404. Requirements for Assessments of Student Achievement.**

**R277-404-[~~2~~]1. Authority and Purpose.**

A. This rule is authorized by Utah Constitution Article X, Section 3 which vests general control and supervision of public education in the Board, Sections 53A-1-603 through 53A-1-611 which direct the Board to adopt rules for the maintenance and administration of U-PASS, and Section 53A-1-401(3) which allows the Board to adopt rules in accordance with its responsibilities.

B. The purpose of this rule is to provide consistent definitions and to assign responsibilities and procedures for a Board developed and directed comprehensive assessment system for all students, as required by state and federal law.

**R277-404-[~~1~~]2. Definitions.**

A. “Board” means the Utah State Board of Education.

B. “Benchmark reading assessment” means an assessment determined by the Board for students in grade 1 through 3 and administered to students at the beginning, midpoint and end of year;

C. “College readiness assessment” means an assessment adopted by the Board that includes a college admissions test that provides an assessment of language arts, mathematics, and science, that is most commonly used by local universities to assess student preparation for college. The college readiness assessment may include the Armed Services Vocational Aptitude Battery (ASVAB) and a battery of assessments that is predictive of success in higher education. “College readiness assessment” includes the American College Testing exam, (ACT).

D. “Educator” means an individual licensed under Section 53A-6-104 and who meets the requirements of R277-501.

E. “English Learner (EL) student” means a student who is learning in English as a second language.

F. “English language proficiency assessment” means an assessment designated by the USOE and designed to measure the acquisition of the academic English language for English Learners.

G. “Family Educational Rights and Privacy Act of 1974 (FERPA),” 20 U.S.C. 1232g, means a federal law designed to protect the privacy of students’ education records. The law is hereby incorporated by reference.

H. “Individualized Education Program (IEP)” means an individualized instructional and assessment plan for students who are eligible for special education services under the Individuals with Disabilities Education Act of 2004.

I. “LEA” means local education agency, including local school boards/ public school districts and schools, and charter schools.

J. “National Assessment of Education Progress (NAEP)” is the national achievement assessment administered by the United States Department of Education to measure and track student academic progress.

K. “Online Writing Assessment” means a Board-designated online assessment to measure writing performance for students in grades 3 through 11.

L. “Pre-post” means an assessment administered at the beginning of the school year and at the end of the school year to determine individual student growth in academic proficiency which has occurred during the school year.

M. “State administered assessments” means summative SAGE, benchmark reading assessments, and the ACT.

[~~M~~]N. “Student Assessment of Growth and Excellence (SAGE)” means a summative computer adaptive assessment for English language arts grades 3 through 11; mathematics grades 3 through 8, and Secondary I, II, and III; science grades 4 through 8, earth science, biology, physics and chemistry.

[~~N~~]O. “Section 504 accommodation plan” required by

Section 504 of the Rehabilitation Act of 1973, means a plan designed to accommodate an individual who has been determined, as a result of an evaluation, to have a physical or mental impairment that substantially limits one or more major life activities.

[~~O~~]P. “Summative adaptive assessments” means assessments administered upon completion of instruction to assess a student's achievement. The assessments are administered online under the direct supervision of a licensed educator and are designed to identify student achievement on the standards for the respective grade and course. The assessments measure the full range of student ability by adapting to each student's responses, selecting more difficult questions when a student answers correctly and less difficult questions when a student answers incorrectly.

[~~P~~]Q. “USOE” means the Utah State Office of Education.

[~~Q~~]R. “Utah alternate assessment” means an assessment instrument designated by the USOE for students in special education with disabilities so severe they are not able to participate in the components of U-PASS even with assessment accommodations or modifications. The Utah alternative assessment measures progress on the Utah core instructional goals and objectives in the student's individual education program (IEP).

[~~R~~]S. “Utah eTranscript and Record Exchange (UTREx)” means a system that allows individual detailed student records to be exchanged electronically between public education LEAs and the USOE, and allows electronic transcripts to be sent to any post-secondary institution, private or public, in-state or out-of-state, that participates in the e-transcript service.

[~~S~~]T. “Utah Performance Assessment System for Students (U-PASS)” means:

(1) summative adaptive assessments of students in grades 3 through 12 in basic skills courses;

(2) an online writing assessment in grades 3 through 11, as part of SAGE;

(3) college readiness assessments; and

(4) summative assessment of students in grade 3 to measure reading grade level using grade 3 SAGE English Language Arts.

**R277-404-3. Board Responsibilities.**

A. The Board shall maintain a comprehensive assessment system for all students in grades K-12. This assessment system shall include:

(1) summative adaptive assessments in English language arts for grades 3 through 11; mathematics for grades 3 through 8; secondary math 1, 2, and 3; and science for grades 4 through 8; earth systems, biology, physics and chemistry;

(2) Online Writing Assessment for grades 3 through 11;

(3) pre-post kindergarten assessment for kindergarten students as determined by the LEA;

(4) one benchmark reading assessment approved by the Board for students in grades 1 through 3 and administered to students at the beginning, midpoint and end of year;

(5) grade 3 end of year summative reading assessment using grade 3 SAGE English Language Arts;

(6) Utah’s alternate assessment, for eligible students with disabilities;

(7) an English language proficiency test;

(8) National Assessment of Educational Progress (NAEP);

(9) college readiness assessments for grade 11 and optional college and career readiness assessments in grade 8 or 9 and 10, as determined by the LEA; and

(10) reporting by the USOE of U-PASS results to include:

(a) student performance based on information that is disaggregated with respect to race, ethnicity, gender, English proficiency, eligibility for special education services, and

135 free or reduced price school lunch status;
136 (b) security features to maintain the integrity of the
137 system, including statewide uniform assessment dates,
138 assessment administration protocols, and training; and
139 (c) summative adaptive assessment results disseminated by
140 USOE to LEAs, parents, and others, as appropriate, consistent
141 with FERPA.
142 B. The Board shall provide specific rules, administrative
143 guidelines, timelines, procedures, and assessment ethics
144 training and requirements for all required assessments.

145 **R277-404-4. LEA Responsibilities.**
146 A. LEAs shall develop a comprehensive assessment system
147 plan to include the assessments described in R277-404-3A.
148 This plan shall, at a minimum, include:
149 (1) professional development for educators to fully
150 implement the assessment system;
151 (2) training for educators and appropriate
152 paraprofessionals in the requirements of assessment
153 administration ethics; and
154 (3) training for educators and appropriate
155 paraprofessionals to utilize assessment results effectively to
156 inform instruction; and
157 (4) adequate oversight of test administration to ensure
158 compliance with Section 53A-1-603(1) as follows:
159 (a) LEAs or online providers shall test all enrolled
160 students unless students have a written parental excuse under
161 Section 53A-15-1403(9);
162 (b) Students participating in the Statewide Online
163 Education Program shall be assessed consistent with Section
164 53A-15-1210; and
165 (c) Third party vendors or contractors may not administer
166 or supervise U-PASS assessments.
167 B. LEAs shall make all policies and procedures consistent

with the law, Board rules for standardized assessment administration, and the USOE Testing Ethics Policy, approved by the Board August 8, 2014.

C. At least once each school year, LEAs shall provide professional development for all educators, administrators, and standardized assessment administrators concerning guidelines and procedures for standardized assessment administration, including educator responsibility for assessment security and proper professional practices.

D. LEA assessment staff shall use the USOE Testing Ethics Policy in providing training for all assessment administrators/proctors.

E. LEAs may not release state assessment data publicly until authorized to do so by the USOE.

**R277-404-5. School Responsibilities.**

A. LEAs/schools shall require educators and assessment administrators/proctors to individually sign the Testing Ethics signature page provided by the USOE acknowledging or assuring that the educator administers assessments consistent with ethics and protocol requirements.

B. All educators and assessment administrators shall conduct assessment preparation, supervise assessment administration, provide assessment results and complete error resolution.

C. All educators and assessment administrators/proctors shall securely handle and return all protected assessment materials, where instructed, in strict accordance with the procedures and directions specified in assessment administration manuals, LEA rules and policies, Board rules, USOE Testing Ethics Policy, and state applications of federal requirements for funding.

D. A student's IEP, EL, or Section 504 team shall determine an individual student's participation in statewide

assessments.

**R277-404-6. Student and Parent Participation in Student Assessments in Public Schools; Parental Exclusion from Testing and Safe Harbor Provisions.**

A. Parents are primarily responsible for their children's education and have the constitutional right to determine which aspects of public education, including assessment systems, in which their children participate. Parental rights may be exercised without notice or permission. Parents may further exercise their inherent rights to exempt their children from certain assessments without further consequence by an LEA.

[~~A~~]B. All LEAs shall administer the [~~comprehensive~~]state administered assessments [~~system~~ ]to all students unless:

(1) the Utah alternat[~~ive~~]e assessment is approved for specific students consistent with federal law and as specified in a student's IEP; or

(2) [~~unless~~ ]students are excused by a parent or guardian under Section 53A-15-1403(9) and as provided in this rule.

C. A parent may exercise the right to exempt their child from any assessment mandated by the Board or state statute. Upon exercising the right to exempt a child from a state-mandated assessment under this provision, an LEA shall not impose any adverse consequence on a child as a result of the exercise of rights under this provision. In order to exercise the right to exempt a child from state-mandated testing under this provision and insure the protections of this provision, a parent shall annually complete a written parent excuse form (on a form to be approved by the USOE), a minimum of five (5) days prior to the administration of the assessment and provide the form to the responsible LEA.

D. School grading, teacher evaluations, and student progress reports or grades will not be negatively impacted by students excused from state administered assessments.

E. Any assessment not mandated by the Board or state-statute, the administration of such assessments, and the consequence of taking or failing to take such assessments shall be governed by policies to be adopted by each LEA.

[~~B~~]F. [~~An LEA educator~~]LEAs shall provide a student's individual test results and scores to the student's parent[~~/legal~~] or guardian[~~ consistent with FERPA~~] upon request and consistent with the protection of student privacy.

**R277-404-7. Public Education Employee Compliance with Assessment Requirements, Protocols, and Security.**

A. Educators, test administrators/proctors, administrators, and school employees may not:

(1) provide students directly or indirectly with specific questions, answers, or the content of any specific item in a standardized assessment prior to assessment administration;

(2) download, copy, print, take pictures of or make any facsimile of protected assessment material prior to, during or after assessment administration without express permission of the USOE and LEA administrators;

(3) change, alter or amend any student online or paper response answer or any other standardized assessment materials at any time in such a way that alters the student’s intended response;

(4) use any prior form of any standardized assessment (including pilot assessment materials) that has not been released by the USOE in assessment preparation without express permission of the USOE and LEA administrators;

(5) violate any specific assessment administrative procedure specified in the assessment administration manual, or violate any state or LEA standardized assessment policy or procedure, or violate any procedure specified in the USOE Testing Ethics Policy;

(6) fail to administer a state required assessment;

(7) fail to administer a state required assessment within the designated assessment window;

(8) submit falsified data;

(9) allow students to copy, reproduce, or photograph assessment items or components; or

(10) knowingly do anything that would affect the security, validity, or reliability of standardized assessment scores of any individual student, class, or school.

B. A school employee shall promptly report all assessment violations or irregularities to a building administrator, an LEA superintendent or director, or the USOE.

C. Educators who violate these rules or assessment protocols are subject to Utah Professional Practices Advisory Commission or Board disciplinary action consistent with R277-515.

D. All assessment materials, questions and student responses for required assessments shall be designated protected, consistent with Section 63G-2-305, until released by the USOE.

E. Each LEA shall ensure that all assessment content is secured so that only authorized personnel have access and that assessment materials are returned to USOE following testing, as required by the USOE. Individual educators or school employees may not retain or distribute test materials, in either paper or electronic form, for purposes inconsistent with ethical test administration or beyond the time period allowed for test administration.

**R277-404-8. Time Periods for Assessment Administration.**

A. LEA educators or trained employees shall administer assessments required under R277-404-3 consistent with the following schedule:

(1) All summative adaptive assessments, an online writing assessment and a Utah alternative assessment (elementary and

secondary, English language arts, math, science) within the USOE annually designated assessment windows.

(2) The English language proficiency assessment:

(a) LEA educators or trained employees shall administer the assessment annually to all English Learner students identified as Level 1 Entering, Level 2 Beginning, Level 3 Developing, Level 4 Expanding, or enrolled for the first time in the LEA at any time during the school year to show student progress; and

(b) LEA educators or trained employees shall submit English language proficiency assessment materials to the USOE-identified scoring provider for scanning and scoring on a schedule defined by the USOE.

(3) LEA educators or trained employees shall administer pre-post kindergarten assessment for kindergarten students as determined by the LEA during assessment windows determined by the LEA.

(4) LEA educators or trained employees shall administer one benchmark reading assessment determined by the Board for grade 1, grade 2, and grade 3 students in the beginning, midpoint, and end of the school year.

(5) LEA educators or trained employees shall administer grade 3 end of year summative reading assessment using grade 3 SAGE English Language Arts.

(6) LEA educators or trained employees shall administer NAEP assessments determined and required annually by the United States Department of Education and administered to students as directed by United States Department of Education.

B. LEA educators or trained employees shall complete all required assessment procedures prior to the end of the USOE-defined assessment window(s).

C. LEAs that have alternative schedules shall submit an annual testing plan to the USOE by September 1 annually. The plan shall:

(1) set dates for summative adaptive assessment administration for courses taught face to face or online;

(2) set dates to assess students at the point in the course where students have had approximately the same amount of instructional time as students on a traditional full year schedule; and

(3) provide a course level assessment schedule to the USOE before instruction begins for the course.

**R277-404-9. Data Exchanges.**

A. The USOE IT Section shall communicate regularly with LEAs regarding required formats for electronic submission of required data.

B. LEAs shall update UTREx data using the processes and according to schedule(s) determined by the USOE.

C. LEAs shall ensure that any computer software for maintaining or submitting LEA data is compatible with data reporting requirements as determined in R277-484.

D. The USOE shall provide directions to all LEAs detailing the data exchange requirements for each assessment.

E. Each LEA shall verify that all the requirements of the USOE-provided directions have been satisfied.

F. Consistent with Utah law, the USOE shall return assessment results from all required assessments to the school before the end of the school year.

**KEY: assessment, student achievement**

**Date of Enactment or Last Substantive Amendment: [~~November 10, 2014~~]2015**

**Notice of Continuation: September 13, 2013**

**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-1-603 through 53A-1-611; 53A-1-401(3)**

# Assessment Schedule for Utah public school students

- The following chart details assessments offered or required by the state or federal government.
- Individual districts or governing boards may offer additional tests that are not mandated by the state or federal government.

| Assessment | Description | Grade | Required By | Data Use | Approximate Testing Time | Testing Window | Data Collection and Reporting under FERPA |
|---|---|---|---|---|---|---|---|
| **SAGE Summative** (Student Assessment of Growth and Excellence) | End of course/grade assessment in English language arts, math and science | English language arts 3-11, Math 3-8, Math I, II, III Science 4-11, Earth Systems, Biology, Physics, Chemistry | Federal and State Law, USOE Board Rule | 1. Assess proficiency in English language arts, math and science<br>2. UCAS (Utah Comprehensive Accountability System)<br>3. School Grading<br>4. Teacher evaluation | 90 minutes per content area | Six weeks prior to last Monday of the school year<br>2014-15<br>• ELA Writing: 2/2/2015- 2/20/2015<br>• Math/Science : 4/1/2014-6/20/2015<br>• Reading ELA 4/15/2015-6/20/2015<br>*LEA discretion with alternate schedules with USOE approval | Daily UTREx files for USOE and Local LEA reporting<br>• Additional immediate online reporting system for parent/teacher/ student use |
| **Online Writing Assessment** embedded in the SAGE English language arts assessment | Writing assessment aligned to Utah state core writing standards | English language arts 3-11 | Federal and State Law, USOE Board Rule | 1. Assess proficiency in writing as part of English language arts<br>2. UCAS (Utah Comprehensive Accountability System)<br>3. Teacher evaluation | Two 1-hour writing sessions | • ELA Writing: 2/2/2015-2/20/2015 (additional field testing 2015)<br>*LEA discretion with alternate schedules with USOE approval | Daily UTREx files for USOE and Local LEA reporting<br>• Additional immediate online reporting system for parent/teacher student use |
| **SAGE Interim** (Student Assessment of Growth and Excellence) | Fall and mid-year assessment in English language arts, math and science | English language arts 3-11, Math 3-8, Math I, II, III Science 4-11, Earth Systems, Biology, Physics, Chemistry | Optional | Assess proficiency in English language arts, math and science | 90 minutes per content area | Open window | • Immediate online reporting system for teacher/ student use |
| **DIBELS** (Dynamic Indicators of Basic Early Literacy Skills) | Reading fluency assessment | 1-3 | State Law, USOE Board Rule | 1. Assess reading proficiency<br>2. Assess reading goals | 5 minutes per student, three times per year | Completed by: Sep. 30, Jan. 31, and June 15 | Local LEA submission of files to USOE through UTREx of reading designation only three times a year.<br>• USOE & Local LEA reporting |
| **WIDA ACCESS** (World Class Instruction Design) | English language proficiency assessment for English learner (EL) students | EL students K-12 | Federal and State Law, USOE Board Rule | 1. Language proficiency<br>2. Placement<br>3. EL Services | 3-4 hours | Jan. 14 –March 13<br>• Same window for traditional and year round | Local LEA submission of files to USOE through UTREx<br>• Local LEA reporting |

| Assessment | Description | Grade | Required By | Data Use | Approximate Testing Time | Testing Window | Data Collection and Reporting |
|---|---|---|---|---|---|---|---|
| **EXPLORE & PLAN** | College and career readiness exams | 8 or 9, 10 | State Law, USOE Board Rule | School information | 2-3 hours | September 1-November 28, 2014 | Local LEA submission of files to ACT for Scoring<br>• USOE & Local LEA reporting |
| **ACT** | College and career readiness exams | 11 | State Law, USOE Board Rule | School Grading | 3-4 hours | First Tuesday in March (make-up test third Tuesday in March) | Local LEA submission of files to ACT for Scoring<br>• USOE & Local LEA reporting |
| **NAEP**<br>(National Assessment of Educational Progress) | National assessment given to students across the nation | Sampling of Utah schools in grades 4, 8, 12 | Federal and State Law, USOE Board Rule | National Content Test in language arts, math and science | 90 minutes | Jan. 21-Mar 1 | USOE submission to NAEP<br>• USOE reporting in aggregate |
| **DLM**<br>Dynamic Learning Maps (Utah Alternative Assessment) | Alternative Utah state summative assessment for special education students | 3-11<br>(1% of students) | Federal and State Law, USOE Board Rule | Assess proficiency in language arts, math and science; used for school and teacher accountability | Varies by student | Six weeks prior to last Monday of school year | Daily UTREx files for USOE and Local LEA reporting |

***UTREx / Data Clearinghouse**

The UTREx/Data Clearinghouse gathers and stores student data throughout the year for exchanging student records and for reporting at the local, state and national levels under FERPA guidelines.

Updated August 14, 2014 by the Utah State Board of Education

## What is the Role of Assessment in Education?

Assessment is the process of gathering and using information from multiple and diverse sources in order to develop a deep understanding of what students know, understand, and can do with their knowledge as a result of their educational experiences; the process culminates when assessment results are used to improve subsequent learning. Today's students need to know not only the basic reading and arithmetic skills, but also skills that will allow them to face a world that is continually changing. They must be able to think critically, to analyze, and to make inferences as never before. Teachers use assessment information to guide their instruction. Assessment results provide teachers with the information they need to provide appropriate individualized instruction, remediation, or enhanced learning experiences. Assessment is a valuable instructional tool to ensure that students are receiving the appropriate instructional supports.

## Three Types of Assessment: Formative, Interim/Benchmark, Summative:

Formative Assessment refers to a wide variety of methods that teachers use on a daily basis to conduct in process evaluations of student learning and academic progress during a lesson, unit, or course. Formative assessments help teachers identify concepts that students are struggling to understand, skills they are having difficulty acquiring or learning standards they have not yet achieved so that adjustments can be made to lessons, instructional techniques and academic support given. The general goal of formative assessment is collect data while it is happening. Examples would be daily class quizzes, discussions, checking for understanding, and monitoring progress.

Interim/Benchmark Assessment refers to assessments that occur at specific intervals along the way to ensure that learning is occurring at the rate and the degree expected. This data is used to compare student achievement and progress with that of other students. Typically teachers use this data to inform their lesson planning and instructional materials. Often, teachers will view these data together and plan together as a way to improve their own professional learning and improve teaching.

Summative Assessment refers to assessments that are used to evaluate student learning progress and achievement at the conclusion of a specific instructional period. It can be thought of as an annual check-up to reflect on student learning that has happened during the year as to the degree that the student's achievement for the year/course has been attained. The data can be used to compare student achievement and progress with that of other students, teachers, and schools.

| Role of Assessment | Teachers | Students/Parents | Schools | Policymakers | USOE involvement |
|---|---|---|---|---|---|
| **Formative**<br>EX: Daily quizzes, small and whole class discussions, learning games, monitoring progress. | Checking for understanding, adjusting instruction, question and answer for mastery. | Promotes parent and student understanding and monitoring of content and student learning. Provides feedback for additional supports. | Supports teachers in daily instruction, provides collaborative tools, informs instructional practice, and improves remediation and enrichment strategies. | Financial support of tools, platforms, professional learning opportunities etc. to assist teachers in daily instruction. | Provides "tools" only support of platforms, item banks, modules and professional learning opportunities that teachers can optionally use to assist daily instruction. No data collection. |
| **Interim/Benchmark**<br>Periodic assessments given within a term or focused on specific learning standards.<br>EX: District created, school created, DIBELS, one SAGE interim | Ensure student learning is occurring at rate and to degree expected. Provides opportunities for school level collaboration. | Ensure learning is occurring at the rate and degree expected. Students can seek additional supports if needed along the way. | Local data is used for collaboration for student/school improvement process. | Financial support of tools platforms, etc. to assist teachers in common assessments and instruction. | Provide one optional SAGE interim opportunity. No data collected at state level. |
| **Summative**<br>EX: SAGE ELA, Math, and Science, ACT, CTE certifications | Data is used to reflect if students are on track for college and career readiness, and identify strengths and weaknesses in instruction and in student achievement. | Annual check-up to determine college and career readiness, and identify individual student strengths and weaknesses. | Provides schools/districts with information on student/teacher /grade and school achievement that can be compared within and across groups. Data is used in school improvement process. | Compare school achievement and growth for accountability purposes. Provide rewards and/or interventions to schools. Target resources to schools in need of improvement. | Provide implementation of summative assessment processes. Provide all summative assessment data and reporting utilizing growth and achievement measurements used by all stakeholders. |

# Response to Concerns Surrounding Summative SAGE Assessments

1. **End of Course Testing takes too much time and decreases instructional time**
   Summative (end of course) assessments provide valuable student information. Similar to an annual check-up, student reports of a SAGE summative assessment can be used to improve future instruction for individual students. This data gives parents, students, and their teachers' valuable information about their new students at the beginning of the school year. With summative data schools can measure the achievement and growth of students each year as well as monitor achievement and growth at the school, district and state level. Actual summative testing time is less than **1%** of the instructional school year (6.5 hours out of a 990 hour; minimum instructional schedule).

2. **SAGE is too difficult and confusing for students**
   SAGE measures readiness for college and careers. Challenging questions assess more rigorous standards designed to prepare students to be successful in post high school endeavors. SAGE provides critical and timely data which allows students to better prepare for their future. With this data, students and their parents can access strategic support and interventions needed to prevent expensive and time-consuming professional or college-level courses.

3. **SAGE technology is frustrating and problematic for students to navigate**
   All new technologies have a learning curve and USOE has received some feedback that the technology was difficult for some students to navigate during the first time SAGE was administered. However, the majority of the feedback has been very positive with schools and districts reporting that students were more engaged in the testing process and liked the new format and test questions. LEAs have worked with USOE to address all technology concerns.

4. **SAGE roll out has been poorly executed**
   The initial implementation of any new technology system includes a learning curve for all involved. Given the condensed timeline for implementation, the number of students, tests and schools that implemented this new system at the very same time, there have been relatively few concerns. All of these concerns have either been addressed immediately, or placed on schedules for future upgrades. Local districts agree that the roll out was smoother than expected, much better than previously implemented computer based testing.

5. **Changing assessment systems/platforms is painful**
   Implementing new systems always results in a learning curve. Students, teachers and administrators as well as Information Technology staff require time to learn and become comfortable with any new system. In 2013, the previous tests, Criterion-Referenced Tests (CRTs) were computer administered to approximately 390,000 students. Regardless of the platform chosen for SAGE, the majority of students would have been required to learn a new testing system.

6. **SAGE testing requires too many computers**
   The use of technology to develop, administer and score assessments has placed a great burden on schools with limited technology. Utah began assessing students for end of level tests with a computer based administration in 2007. Each year following, more schools implemented computer based testing. In 2009, all end of level tests administered in the spring were administered in a computer based format, resulting in 100% of Utah students participating in computer testing, three years before SAGE was implemented. Districts and schools that have implemented additional locally required computer tests, have also increased the requirement for technology to administer all of these tests. As students prepare for post-secondary success, computer testing is used in both colleges and careers based training.

7. **Where do the SAGE questions come from?**
All SAGE questions go through an extensive Utah-specific development and review process. Utah teachers and content experts review each question for alignment to the Utah Core Standards, depth of knowledge, bias and sensitivity, and item difficulty. All questions are reviewed by a 15 member parent panel chosen by the Utah State Legislature, Utah State Board of Education, and the Governor's office. Continual development allows Utah to own items written by Utah teachers for Utah teachers.

8. **Why can't all parents view the test questions?**
SAGE summative tests are similar to final exams, ACT, SAT, Advanced Placement Tests, GED, GRE, etc., where the test questions are kept secure to ensure that each student has the same opportunity to answer questions correctly. The validity of test scores is dependent on secure questions. Parents can view similar questions through the public SAGE training tests. A 15 member Parent Review Committee has reviewed every question in the SAGE item (questions) bank.

9. **Test prep for SAGE is too time consuming**
Teachers are encouraged to focus their instructional time on teaching the Utah Core Standards. Minimal time should be spent on teaching students good test taking strategies and reviewing the technology to respond to different types of test questions. With the adaptive nature of SAGE, there is no "prepping" for the test. There are over 400 questions available for each test. The best preparation is teaching the core standards.

10. **Scores on SAGE are too low**
SAGE scores now provide essential data as to each student's performance in regards to college and career readiness. With the increased rigor of the Utah Core Standards, the aligned assessment system has increased expectations of student performance. The SAGE results now are similar to scores on ACT and NAEP. Recent experience in other states, as well as past experience in Utah suggests that test scores will improve after the administration of a new assessment.

11. **End of course data requires that student data is sent to a third party vendor for scoring**
Many assessments currently in use in Utah involve administration and scoring by a third party vendor (outside service provider). Local districts use Yearly Progress Pro (YPP), DIBELS, Illuminate, Data Wise, Utah Compose, Accuity, ACT and ASVAB and are all administered and scored by third party vendors. The data is secure and complies with all board, state and federal requirements for the transfer, storing and reporting of the data. The Utah State Board of Education owns student data collected, scored, or held by third party vendors. Vendors may not share or sell that data. In addition, student level data cannot be shared or used for any purpose outside the scope of the limited expressed permission of the Board.

12. **SAGE results aren't nationally normed**
"Norming" infers the comparison of a student to other test takers. Student normed performance is not measured against a standard or criteria but only other test takers. Due to the recent implementation of Common Core Standards, there are currently no national assessments that have been normed. SAGE results are benchmarked against proficiency on the Utah core standards, with ACT and NAEP used as referents to determine the proficiency cut scores, thus ensuring college and career readiness.

13. **SAGE needs to be improved**
USOE has implemented improvements to SAGE based on feedback received from the spring 2014 administration. These improvements and enhancements include: reducing the time for the writing test, adding a dictionary, improving the test administration instructions and improving the text to speech and listening features, and additional item development. USOE will continue to improve SAGE each year.

# 2013-14 SAGE Summative Tests Parental Exclusion Report

## Background

Utah Code 53A-15-1403(9) permits parents, or students over the age of 18, to request to be excused from tests administered statewide, including the Student Assessment of Growth and Excellence (SAGE) Summative tests. That law also instructs that, as a result of the student being excluded from statewide tests, neither the district or charter school (LEA) nor its staff should be negatively affected in school grading or employee evaluations. As such, students who were exempt from testing in accordance with this law are excluded from participation and performance calculations for Utah's state accountability measures. These students cannot be excluded from federal accountability measures and reports, however, and are reported as non-participants. This may affect an LEA's qualification for and the reception of certain federal dollars. A student who was not under parental exclusion and did not take the SAGE SUMMATIVE test due to absence or other reasons is counted as a non-participant in both state and federal accountability participation rate calculations.

## Parental Exclusion Rates

For the 2013-2014 school year, 1,119,465 SAGE Summative tests were expected to be taken (including the Math, Science, and English Language Arts subject tests). Approximately 2% of these tests were not taken due to the parental exclusion under Utah Code 53A-15-1403(9). This percentage was higher in charter schools (7.6%) than in district schools (1.5%). Parental exclusion rates, by LEA, ranged from 0% to 73%. Sixteen schools had a parental exclusion rate of over 20%. Among these, seven were online or virtual schools, seven were charter schools, and two were district schools.

| LEA Type | LEA Name | Percent of Tests with Parental Exclusion |
|---|---|---|
| District | Alpine District | 2.8% |
| District | Beaver District | 2.5% |
| District | Box Elder District | 0.3% |
| District | Cache District | 0.5% |
| District | Canyons District | 0.8% |
| District | Carbon District | 0.4% |
| District | Daggett District | 0.6% |
| District | Davis District | 1.9% |
| District | Duchesne District | 4.3% |
| District | Emery District | 0.2% |
| District | Garfield District | 0.1% |
| District | Grand District | 3.3% |
| District | Granite District | 0.7% |
| District | Iron District | 0.2% |
| District | Jordan District | 1.0% |
| District | Juab District | 0.7% |
| District | Kane District | 1.4% |
| District | Logan City District | 0.3% |
| District | Millard District | 0.2% |
| District | Morgan District | 6.5% |
| District | Murray District | 1.7% |
| District | Nebo District | 0.8% |
| District | North Sanpete District | 1.2% |
| District | North Summit District | 0.7% |
| District | Ogden City District | 0.4% |
| District | Park City District | 1.4% |
| District | Piute District | 3.0% |
| District | Provo District | 5.1% |
| District | Rich District | 1.99% |
| District | Salt Lake District | 0.3% |
| District | San Juan District | 1.0% |
| District | Sevier District | 1.8% |
| District | South Sanpete District | 2.6% |
| District | South Summit District | 0.3% |
| District | Tintic District | 1.2% |
| District | Tooele District | 1.5% |
| District | Uintah District | 5.1% |
| District | Wasatch District | 1.6% |
| District | Washington District | 1.5% |
| District | Wayne District | 0.7% |
| District | Weber District | 1.0% |
| **District** | **Overall** | **1.5%** |

| LEA Type | LEA Name | Percent of Tests with Parental Exclusion |
|---|---|---|
| Charter | Academy for Math Engineering & Science (AMES) | 0.3% |
| Charter | Alianza Academy | 1.6% |
| Charter | American Leadership Academy | 7.4% |
| Charter | American Preparatory Academy | 1.3% |
| Charter | Aristotle Academy | 0.0% |
| Charter | Bear River Charter School | 2.5% |
| Charter | Beehive Science & Technology Academy (BSTA) | 1.2% |
| Charter | Canyon Grove Academy | 19.7% |
| Charter | Canyon Rim Academy | 0.0% |
| Charter | Channing Hall | 0.0% |
| Charter | City Academy | 0.9% |
| Charter | C.S. Lewis Academy | 49.8% |
| Charter | DaVinci Academy | 33.0% |
| Charter | Dual Immersion Academy | 0.0% |
| Charter | Early Light Academy at Daybreak | 6.3% |
| Charter | East Hollywood High | 0.3% |
| Charter | Edith Bowen Laboratory School | 0.0% |
| Charter | Endeavor Hall | 1.2% |
| Charter | Entheos Academy | 3.9% |
| Charter | Excelsior Academy | 3.7% |
| Charter | Fast Forward High | 1.3% |
| Charter | Freedom Preparatory Academy | 5.8% |
| Charter | Gateway Preparatory Academy | 24.6% |
| Charter | George Washington Academy | 5.9% |
| Charter | Good Foundations Academy | 2.4% |
| Charter | Guadalupe School | 0.0% |
| Charter | Hawthorn Academy | 0.0% |
| Charter | Highmark Charter School | 1.9% |
| Charter | Intech Collegiate High School | 1.1% |
| Charter | Itineris Early College High | 8.7% |
| Charter | Jefferson Academy | 3.5% |
| Charter | John Hancock Charter School | 19.8% |
| Charter | Karl G. Maeser Preparatory Academy | 11.7% |
| Charter | Lakeview Academy | 3.7% |
| Charter | Leadership Learning Academy | 1.7% |
| Charter | Legacy Preparatory Academy | 9.0% |
| Charter | Liberty Academy | 7.9% |
| Charter | Lincoln Academy | 13.5% |
| Charter | Mana Academy Charter School | 50.3% |
| Charter | Maria Montessori Academy | 1.5% |
| Charter | Merit College Preparatory Academy | 3.3% |
| Charter | Moab Charter School | 0.0% |

| LEA Type | LEA Name | Percent of Tests with Parental Exclusion |
|---|---|---|
| Charter | Monticello Academy | 1.8% |
| Charter | Mountain Heights Academy | 15.1% |
| Charter | Mountainville Academy | 5.4% |
| Charter | Navigator Pointe Academy | 1.5% |
| Charter | Northern Utah Academy for Math Engineering & Science (NUAMES) | 2.5% |
| Charter | Noah Webster Academy | 2.3% |
| Charter | North Davis Preparatory Academy | 2.4% |
| Charter | North Star Academy | 3.8% |
| Charter | Odyssey Charter School | 10.4% |
| Charter | Ogden Preparatory Academy | 0.5% |
| Charter | Open Classroom | 2.6% |
| Charter | Pacific Heritage Academy | 29.1% |
| Charter | Paradigm High School | 22.6% |
| Charter | Pinnacle Canyon Academy | 0.0% |
| Charter | Pioneer High School for the Performing Arts | 72.7% |
| Charter | Promontory School of Expeditionary Learning | 1.8% |
| Charter | Providence Hall | 4.2% |
| Charter | Quest Academy | 2.3% |
| Charter | Ranches Academy | 1.1% |
| Charter | Reagan Academy | 0.7% |
| Charter | Renaissance Academy | 10.8% |
| Charter | Rockwell Charter High School | 19.3% |
| Charter | Salt Lake Arts Academy | 0.1% |
| Charter | Salt Lake Center for Science Education | 0.0% |
| Charter | Salt Lake School for the Performing Arts | 0.0% |
| Charter | Soldier Hollow Charter School | 5.1% |
| Charter | Spectrum Academy | 2.6% |
| Charter | Success Academy | 0.3% |
| Charter | Summit Academy | 2.8% |
| Charter | Summit Academy High School | 2.9% |
| Charter | Syracuse Arts Academy | 0.7% |
| Charter | Thomas Edison | 5.4% |
| Charter | Timpanogos Academy | 0.0% |
| Charter | Tuacahn High School for the Performing Arts | 1.6% |
| Charter | Uintah River High | 6.7% |
| Charter | Utah Career Path High School | 16.5% |
| Charter | Utah Connections Academy | 9.0% |
| Charter | Utah County Academy of Science (UCAS) | 0.0% |
| Charter | Utah International Charter School | 0.0% |
| Charter | Utah Virtual Academy | 21.7% |
| Charter | Valley Academy | 1.6% |
| Charter | Venture Academy | 3.2% |

| LEA Type | LEA Name | Percent of Tests with Parental Exclusion |
|---|---|---|
| Charter | Vista at Entrada School of Performing Arts and Technology | 2.4% |
| Charter | Voyage Academy | 0.9% |
| Charter | Walden School of Liberal Arts | 1.8% |
| Charter | Wasatch Peak Academy | 0.0% |
| Charter | Weilenmann School of Discovery | 0.9% |
| **Charter** | **Overall** | **7.6%** |

TO: Jo Ellen Shaeffer and Judy Park, USOE
FROM: Scott Marion, Center for Assessment
RE: Technical and Policy Advisory Recommendations on "Opt Out"
DATE: March 30, 2015

USOE asked the Utah Technical Advisory (TAC) and the Policy Advisory Committees (PAC) to offer recommendations about how USOE should address the accountability implications presented by the recently passed legislation, Parental Rights in Education (Senate Bill 204-S02). The TAC met on March 17th and the PAC met on March 25th. Both groups discussed and offered recommendations regarding the "opt out" law recognizing that the Utah State Board of Education will need to adopt a rule that addresses the ramifications of having too many students missing from accountability calculation to produce valid scores (or grades).

Both committees were concerned with any rule that permits fewer than 95% of students to participate in statewide assessments. While 95% may seem arbitrarily high, we can look at another extreme and acknowledge that, if only 20% of the students participated in the state assessments, for example, it does not seem possible to provide a credible accountability score. Therefore, both advisory bodies offered recommendations for the State Board that tried to meet the spirit of the law while preserving the credibility of the accountability scores.

The TAC recommended a lower threshold of **80% participation**. Once a school/district has fewer than 80% of its students participating (i.e., 79.9%), **no school grade or other accountability** score should be provided. However, the TAC was concerned that if the 20% of potential non-participants were not representative of the rest of the school population, the accountability results would still be invalid. Therefore, the TAC also recommended that **once the participation rate drops below 90%** (i.e., 89.9%), a test[1] must be performed to document that the participating **students are representative of the full school population**. If the school fails this test, no school grade or other accountability score will be provided.

The TAC strongly recommended that **students be prohibiting from opting out of formative assessment** and locally-developed assessments because it will harm students by depriving educators and students of instructionally useful information and instructionally beneficial experiences. It would be equivalent to allowing students to opt out of instruction.

The PAC fully endorsed the TAC recommendations presented above. However, the PAC wanted to go one step further and **require that any score/grade based on fewer than 95% of the school enrollment be marked with an asterisk (*)** to indicate that it is not likely a fully valid score.

[1] The specific criteria for such a test will be based on tolerances associated with a chi-square test associated for evaluating differences in proportions.

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# Assessment Opt-Out Policies: State responses to parent pushback

Stephanie Aragon, Julie Rowland and Micah Ann Wixom

With new state assessments kicking into full swing across the country, schools are seeing more and more parents wanting to opt out their children. Determining whether states allow assessment opt-outs can be complex and is constantly evolving. In some states the answer is clear: State policies either allow or prohibit state assessment opt-outs, or state departments of education issue clear guidance that opt-outs are not allowed.

In many states, however, the guidance as to whether opt-outs are allowed is far less clear, as departments of education are often silent on the issue. Additionally, many states have no consequences in place for not participating in mandatory assessments, adding a further wrinkle to defining what it means for states to truly prohibit opt-outs.

> "Confusion is growing as parents increasingly want to opt their children out of state tests. Some state policies are clear on this issue, but many are still working through the process."

## KEY TAKEAWAYS

State laws in California and Utah allow parents to opt their children out of state assessments for any reason.

Legislation introduced in New Jersey would allow opt-outs. Similar legislation in Mississippi failed to progress.

Laws in some states – such as Arkansas and Texas – clearly prohibit opt-outs, while the law is less clear in other states.

*The information provided in this report is not exhaustive and derives from a variety of sources. It is meant to provide state education leaders with a broad look at how their peer states are handling similar challenges.*

## Opt-outs allowed

A few states have laws or regulations expressly allowing parents to opt out of assessments for any reason. **Utah**[1] and **California**[2] provide good examples of explicit opt-out language. Additionally, legislators in **New Jersey** and **North Dakota** recently introduced bills that would allow parents to opt out of assessments.

New Jersey's bill would require parents to provide written notification at least 14 days before the assessment and would require districts and schools to provide alternative activities.[3] North Dakota's bill would require parents to be notified of their right to opt out prior to test administration.[4] Another bill expressly permitting opt-outs was introduced this session in **Mississippi**, but subsequently died in committee.[5]

In several other states, opt-outs are not provided for in statute but are permitted by the department of education. The **Minnesota** Department of Education, for example, has indicated that there are no consequences for students who opt out of state exams.[6] Even though the completion of state exams is included as a graduation requirement, diplomas cannot be withheld from students who refuse to participate. Similarly, the **Michigan** Department of Education discourages but does not prohibit student opt-outs.[7]

Many states exempt students from participating in state assessments in cases of a physical disability, medical reasons or emergencies. Two states allow parents to opt out for a religious objection (see sidebar). Activist groups across the country have encouraged parents to use these limited exemptions as a basis for opting out even when students may not fit within the exemptions. This is occurring in Portland, **Oregon**, where activists are encouraging parents to opt out under the state's religious exemption.[8]

### Religious exemptions

**Oregon**[16] and **Pennsylvania**[17] excuse students from state testing to accommodate religious beliefs. In Pennsylvania, parents seem to be utilizing this policy to opt their students out of state tests.[18] It doesn't appear the state has issued guidance to parents or districts on this issue, although some school districts are apparently taking disciplinary action against teachers who inform parents about this opt-out provision.[19]

## Opt-outs not allowed: The spectrum of guidance

In states that do not expressly allow students and parents to opt out, publicly available responses from state departments of education run along a spectrum from silence on the issue to state guidance or policies clearly prohibiting opt-outs.

Departments of education in several states – such as **New Jersey**[9] and **South Carolina**[10] – have given guidance to local district and school leadership that either prohibits schools and districts from allowing parents to opt their children out or expressly states that students must take state assessments.

Few state departments provide information directly to parents and the public about opting out. **Oregon**[11] and **Ohio**[12] appear to be two of the only states that take the extra step of providing public information, clearly outlining both the purpose of their state assessments and the potential consequences to not taking them.

In states that prohibit opting out of state assessments, departments frequently cite state policies. These policies usually require school districts to administer state assessments to all students in specified grades – sometimes with limited exceptions. In addition to requiring districts to administer assessments to all students, some states' policies also require students to take them. For example, state law in **Arkansas** says that participation in the state testing program is mandatory,[13] while **Texas** does not allow parents to

### Research on opt-outs and their impact

A **New Jersey** law firm has analyzed court cases and laws commonly cited by the parent advocacy group United Opt Out. The analysis concluded that these sources do not support a parent's right to opt students out of state assessments.[20]

Research for Action's policy brief describes how opt-outs may positively or negatively impact school performance ratings and teacher and principal evaluations.[21]

remove a student from class or other school activity to avoid a test.[14] Many departments of education also cite provisions from Section 1111 of the No Child Left Behind Act to support their stance that students must participate in state assessments.[15]

Finally, many states appear to be silent on the issue, meaning there is no publicly available communication from departments of education to local district and school leaders or the public about the state's stance on opting-out. In these cases, local district or school leaders may adopt their own policies. For example, a **North Dakota** school district informed parents that while state policies require the district to administer state assessments to all students, the district will not take action against any student who does not participate.[22]

## Loosening a state's grip on testing

A handful of states are seeking ways to bypass state laws to release districts from their testing obligations. In **Colorado**, the state Board of Education was stymied in its attempt to grant testing waivers to districts after the state attorney general determined that it does not have this authority. However, the board recently passed a motion that relieves districts of any penalty if fewer than 95 percent of students participate in testing because of opt-outs this spring.[23] The Department of Education encouraged districts to make a good faith effort to test all students in accordance with state and federal law.

In **Louisiana**, Gov. Bobby Jindal recently issued an executive order that could allow parent opt-outs, although stakeholders have requested that the Board of Education clarify the state's policy.[24]

### A parent rights state of mind: New York City

New York City's City Council is currently considering allowing parents to opt out of assessments.[25] A potential resolution, which will likely be released by publication of this paper, would ask the city's Education Department to add provisions about parent opt-out to the department's Parents' Bill of Rights and Responsibilities.

While **New York** state does not have a formal opt-out provision, the city's parent guide to assessment participation indicates that principals must respect the parents' decision about testing and work with parents to provide students with an alternate activity.[25]

## Related ECS resources:

For a high-level overview of which tests are taken where, check out our snapshot of states' assessment choices, *50 Ways to Test: A look at state summative assessments in 2014-15*.

To better understand the standards landscape, *States and the (not so) new standards – where are they now?* examines how states are affirming, modifying or replacing the Common Core State Standards and provides information about who controls standard-setting in various states.

Take a deeper dive with *State standard-setting processes*, which includes profiles of the actions taken in eight states, as well as the measures used by those states to validate their standards.

*The following appendix provides a brief snapshot of information related to assessment opt-outs across the 50 states and District of Columbia, where available.*

# Appendix

### *Alabama*
No information identified.

### *Alaska*
No information identified.

### *Arizona*
The Department of Education's parent guide to understanding state assessments clearly states that, per state and federal policies, parents may not allow students to opt out of state assessments.

### *Arkansas*
According to the state Department of Education, participation in state assessments is mandatory under state law unless the state Board of Education decides otherwise. However, the state board is not permitted to make accommodations that negate the validity of a statewide assessment, which result in less than 95 percent of all students attending public school participating in the testing program.

### *California*
California law (Cal. Educ. Code § 60615) allows parents to opt their children out of assessments through a written request. Districts are required to keep track of how many students were opted out by their parents.

### *Colorado*
Although the state attorney general recently found that the state Board of Education does not have the authority to grant testing waivers to districts, the board recently passed a motion that seeks to exempt districts from any penalty if fewer than 95 percent of students participate in testing this spring.

### *Connecticut*
The Department of Education clarified the state's policies on state assessments in two separate documents sent to district-level staff, namely that all students (with two minor exemptions) must take them.

### *Delaware*
Citing state and federal law, the Department of Education's one-page publication on opt-outs states that students are exempt from state tests only for extreme medical incidents or for reasons of mental health.

### *District of Columbia*
While information from the District of Columbia was not identified, one high school warned that students who do not participate in assessments will not be eligible to participate in sports next year.

### *Florida*
Although information about Florida's position could not be located on the Department of Education's website, it appears that Florida does not allow students to opt out of assessments. Pam Stewart, the state's commissioner of education, wrote a letter to state Sen. Don Gaetz clarifying Florida's position and highlighting, in detail, the potential consequences of a student opting out. Interestingly, a Florida school district had voted to opt the entire district out of state tests but reversed that decision because of the consequences.

### *Georgia*
No information identified.

### *Hawaii*
Hawaii appears to require all students to participate in state assessments (see p. 14 of the state's test administration manual).

### *Idaho*
Idaho has no policy allowing for students to opt out. It appears that districts can make their own decisions, but the Department of Education provides help for any districts that need to respond to parents who want to opt out. The state's Smarter Balanced Educator Communicators Toolkit includes suggested answers to questions about opting out.

### *Illinois*
The Illinois State Board of Education issued a letter to parents stating that students may not opt out of the PARCC assessment under state and federal law. The board also states that districts can develop a policy for those students who refuse to take assessments on testing days, but emphasizes that refusal would violate state and federal laws.

### *Indiana*
Indiana's Department of Education acknowledges that it is not against the law for a parent to refuse to allow a child to participate in assessments but cautions that students must participate in statewide assessments to graduate. Additional consequences and procedures to manage students who refuse to participate are determined at the local school level.

### *Iowa*
Iowa provides clear guidance on its Department of Education website, prohibiting opt-outs under state and federal law. The department provides that school districts determine the consequences for parents who choose to opt their children out.

### *Kansas*
Opt-out issues are handled at the local level. Kansas expects a minimum of 95 percent participation this year.

### *Kentucky*
The commissioner of education clarified that opting out of assessments is prohibited. He cited Kentucky statute Ky. Rev. Stat. Ann. § 158.6453 and 703 Ky. Admin. Regs. 5:140 as creating an accountability system that is designed to ensure that all schools and districts are serving all students and that gaps in categories of students are identified, addressed and closed. The commissioner asked that schools explain to parents that all students must be tested to accomplish these goals.

### *Louisiana*
In addition to efforts to remove the Common Core standards from his state, Gov. Bobby Jindal issued an executive order on Jan. 30, 2015, that could allow parent opt-outs. According to news reports, the governor, state school boards association and a state teachers union, along with several districts and Common Core opponents, have requested that the Board of Elementary and Secondary Education schedule a special meeting to clarify the state's opt-out policy.

### *Maine*
No information identified.

### *Maryland*
According to a brochure released by the Maryland State Department of Education, while parents have a fundamental right to choose whether to send their children to a public school, they cannot selectively choose or reject parts of the public education program itself – including student testing. A parent-initiated lawsuit challenging mandatory assessments and confirming a parent's right to refuse testing in Maryland is pending.

### *Massachusetts*
According to a 2014 letter from the state's commissioner of education, participation is mandatory because Massachusetts law (Mass. Gen. Laws Ann. 69 §1i) does not contain an opt-out provision. However, the same letter requires schools to provide an alternative educational activity for students who refuse to participate in the assessment. Still, one Massachusetts district that allowed students to refuse to take a state pilot exam received a notice from the Board of Elementary and Secondary Education reiterating the assessment mandate.

### *Michigan*
According to a report by the Michigan Department of Education, there is no rule prohibiting parents from opting their students out of assessments. However, districts are encouraged to limit exemptions because they will be held to the requirement that 95 percent of their students complete the assessment.

### *Minnesota*
Currently, no consequences exist for students in Minnesota who opt out of state exams. According to a Department of Education presentation, although students in grade 8 and above are expected to participate in the exams in order to meet their graduation assessment requirements, diplomas will not be withheld from students who are absent during testing. While state statute does not specifically allow for opt-outs, it does not prevent students from refusing to participate. Some districts assist in this process by providing opt-out forms (like the form provided by Minneapolis Public Schools).

### *Mississippi*
State statute (Miss. Code Ann. § 37-16-7) requires students to achieve a passing score on each of the required high school exit exams in order to receive their diploma. There is a bill working its way through the legislature that would prohibit entirely the state Board of Education and local school districts from including assessments in graduation requirements. Another bill that specifically granted parents the right to opt their children out of the exams and to formalize a procedure for opt-outs died in committee.

### *Missouri*
Currently, no formal process exists for students to opt out of state assessments. A Q&A report by the Department of Education notes that districts are compelled by federal and state statute to assess all of the students in their district. State statute requires district school boards to establish a written policy on student participation in these exams.

### *Montana*
No information was identified.

### *Nebraska*
It is unclear if parents may opt out of state assessments on behalf of students. Some materials from the Department of Education (including the 2013 online test administration manual and the accountability scoring rules) reference a mechanism for parent refusal of state assessments, but other materials do not. The

department's position on this issue is unclear.

### *Nevada*

Apparently the Department of Education allowed parents to opt out of 2013 state assessment field testing. No further information was identified.

### *New Hampshire*

State law requires that assessments be administered in all school districts and that all students in all grades participate. According to a release from the Department of Education, public school children are legally required to take the assessment and parents have no legal right to opt their children out. Exemptions exist only in special circumstances, such as serious illness, severe emotional distress and participation in another state or alternative assessment.

### *New Jersey*

The Department of Education sent guidance to district and school leadership on the opt-out issue, informing them that state and federal policy requires students to participate in statewide assessments and encouraging district and school leadership to inform parents and students why the assessments are important. According to a few news articles (here and here), Commissioner of Education David Hespe encouraged districts to create policies on handling opt outs, including potential disciplinary actions.

### *New Mexico*

In this assessment procedures manual, the Department of Education makes clear that federal and state law require all students to participate in state assessments. Students who refuse to take the test, with the exception of those who receive a state medical exemption, count against the school for A-F School Grades. Although alternative methods are identified, the state requests that students demonstrate competency in the five core subject areas through completion of the accountability assessment in order to meet graduation requirements.

### *New York*

While there is a contingent in New York actively advocating for testing opt outs, the New York Department of Education issued guidance in 2013 clearly stating that there is no provision in statute or regulation allowing parents to opt their children out of state tests. Despite this guidance, education policy leaders in New York City are taking steps that would allow for opt outs (see sidebar).

### *North Carolina*

According to a handbook released by the state Board of Education, board policy prevents students from opting out of exams. An exam answer sheet must be provided to all students. Students whose answer sheets are blank will receive the lowest possible score and the student's course and overall grade point average may be negatively affected. A memo from the deputy state superintendent provides additional information to LEA superintendents and charter school directors about assessment mandates and the protocol for handling refusal requests.

### *North Dakota*

There is no information from the Department of Education on this matter. However, legislators recently introduced H.B. 1283, which would allow parents to opt out of state assessments and would require parents to be notified of their right to opt out prior to test administration. In addition, officials from the West Fargo Public Schools District disseminated information to parents informing them that while the district is required to administer assessments to all students, the district will not take action against any student and any student's family if the student does not complete the assessment.

### *Ohio*

The Department of Education prepared a document outlining the importance of student participation in state tests and three possible consequences to opting out. Ohio is one of only a few states in which the department clearly and publicly outlined the potential consequences of students not taking state assessments. Some of those consequences include:

1. Third graders may be retained due to the state's third-grade reading and retention policies.
2. Opting out may affect high school graduation, as assessments are part of the state's graduation requirements.
3. English language learners may be delayed or prevented from exiting the English development program.

### *Oklahoma*

The Department of Education does not provide opt-out options to students. According to a report, statutory and Department of Education rules require all districts to provide a test to every student enrolled in respective testing grades. If a parent wants to opt a child out of an exam, the district must provide the test to the student and document the student's refusal to participate. The failure of a district to achieve a 95 percent participation rate will result in the district automatically earning a lower grade on the A-F report card.

### *Oregon*

The Department of Education provides an FAQ on testing exemptions, which includes information about allowed exemptions (disabilities or religious beliefs) and the request process; federal and state requirements; how exemptions impact school accountability ratings; and the impact of opt-outs on

graduation.

### *Pennsylvania*

State policy allows parents to opt their children out of state assessments if a test conflicts with a family's religious or moral beliefs, and parents seem to be using this policy. It doesn't appear the state has issued guidance to parents or districts on this issue, although some school districts are apparently taking disciplinary action against teachers who inform parents about this opt-out provision.

### *Rhode Island*

The Department of Education expects all students to participate in statewide assessments, and students may only be exempted, with department approval, for medical reasons or emergencies.

### *South Carolina*

One of South Carolina's state superintendents sent guidance to school district leaders on this issue. In short, state and federal policy does not provide opt-out provisions for parents or students.

### *South Dakota*

State policies require districts to administer state assessments to all students (S.D. Code Ann. § 13-3-55; S.D. Admin. R. 24:55:07:08) and all students are required to take them (S.D. Admin. R. 24:55:07:01), with an exemption for English language learner students (S.D. Admin. R. 24:55:07:11). No information from the Department of Education was identified.

### *Tennessee*

It does not appear that the Department of Education has issued any guidance on this issue. However, state achievement tests for students in grades 3-8 compose a percentage of the student's final grade, up to 25 percent (Tenn. Code Ann. §49-1-617). The department does allow for department-approved medical exemptions. Legislation enacted in 2014 allows parents to opt their student out of participating in a survey, analysis, or evaluation, but it is not clear if this extends to state assessments (Tenn. Code Ann. §49-2-211).

### *Texas*

According to Texas law (Tex. Educ. Code Ann. § 26.010), parents are not entitled to remove a child from class or other school activity to avoid a test. Although no information from the Texas Education Agency was identified, the Texas Association of School Boards has provided guidance to school boards about opting out of standardized tests, including the potential consequences of missing these tests.

### *Utah*

Utah law (Utah Code Ann. § 53A-15-1403(9)) allows parents to opt their children out of state assessments. These students are excluded from state accountability measures but cannot be excluded from federal accountability measures and reports. (Also see a recent memo from the Department of Education about the state's opt-out policy.)

### *Vermont*

In 2014, the Department of Education issued a statement to help districts and school boards answer questions about opting out. In short, school districts are required to participate in state assessments and each school must account for 100 percent of its enrolled students by reporting a score or documenting a valid exemption, which include health or personal emergencies but not parent refusal.

### *Virginia*

In a 2013 memo to school district leaders, the state superintendent clarified that state assessment regulations do not provide for an opt-out policy and gave procedures to follow for any students refusing to take assessments. One of the procedures strongly encourages schools to request a written statement from parents about the reason for refusal, which should be included in the student's file.

### *Washington*

According to the Department of Education, a parent may refuse to have his/her child take state tests. However, high school students must to pass certain state assessments before graduating.

### *West Virginia*

No information was identified.

### *Wisconsin*

Per state policy (Wis. Stat. § 118.30(2)(b)3), school districts in Wisconsin must excuse students in grades 4, 8 and 9-11 from state assessments at any time during the testing window upon the request of a parent. Students in other grades may only be excused at the discretion of the school board.

### *Wyoming*

In 2014, the Department of Education requested an opinion from the Wyoming Attorney General's office regarding parent opt-outs from state-mandated testing. According to an opinion from the office of the state's attorney general, districts are required to assess all eligible students and students may not opt out of assessment.

# ENDNOTES


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# PARENTAL RIGHTS IN PUBLIC EDUCATION AMENDMENTS

2015 GENERAL SESSION

STATE OF UTAH

**Chief Sponsor: Aaron Osmond**

House Sponsor: Rich Cunningham

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**LONG TITLE**

**General Description:**

This bill amends provisions related to certain rights of a parent or guardian of a student enrolled in a public school and provisions related to achievement tests.

**Highlighted Provisions:**

This bill:

- defines terms;
- limits the grade levels of a student that is subject to a parent's or guardian's right to retain a student on grade level;
- amends provisions related to a parent's or guardian's right to excuse a student from attendance for certain purposes;
- amends provisions related to a parent's or guardian's right to excuse a student from taking certain tests;
- provides that an accommodation to certain rights of a parent or guardian may only be provided if the accommodation is consistent with federal law and a student's Individualized Education Plan, if applicable; and
- requires the State Board of Education to make rules providing that scores on certain tests may not be considered in determining a student's academic grade or whether a student may advance to the next grade level.

**Money Appropriated in this Bill:**

None

**Other Special Clauses:**

30 None

31 **Utah Code Sections Affected:**

32 AMENDS:

33 **53A-1-603**, as last amended by Laws of Utah 2013, Chapter 161

34 **53A-15-1401**, as enacted by Laws of Utah 2014, Chapter 392

35 **53A-15-1402**, as enacted by Laws of Utah 2014, Chapter 392

36 **53A-15-1403**, as enacted by Laws of Utah 2014, Chapter 392

37

38 *Be it enacted by the Legislature of the state of Utah:*

39 Section 1. Section **53A-1-603** is amended to read:

40 **53A-1-603. Duties of State Board of Education.**

41 (1) The State Board of Education shall:

42 (a) require each school district and charter school to implement the Utah Performance
43 Assessment System for Students, hereafter referred to as U-PASS;

44 (b) require the state superintendent of public instruction to submit and recommend
45 criterion-referenced achievement tests or online computer adaptive tests, college readiness
46 assessments, an online writing assessment for grades 5 and 8, and a test for students in grade 3
47 to measure reading grade level to the board for approval and adoption and distribution to each
48 school district and charter school by the state superintendent;

49 (c) develop an assessment method to uniformly measure statewide performance, school
50 district performance, and school performance of students in grades 3 through 12 in mastering
51 basic skills courses; and

52 (d) provide for the state to participate in the National Assessment of Educational
53 Progress state-by-state comparison testing program.

54 (2) Except as provided in Subsection (3) and Subsection 53A-1-611(3), under
55 U-PASS, the State Board of Education shall annually require each school district and charter
56 school, as applicable, to administer:

57 (a) as determined by the State Board of Education, statewide criterion-referenced tests

58 or online computer adaptive tests in grades 3 through 12 and courses in basic skill areas of the
59 core curriculum;
60 (b) an online writing assessment to all students in grades 5 and 8;
61 (c) college readiness assessments as detailed in Section 53A-1-611; and
62 (d) a test to all students in grade 3 to measure reading grade level.
63 (3) Beginning with the 2014-15 school year, the State Board of Education shall
64 annually require each school district and charter school, as applicable, to administer a computer
65 adaptive assessment system that is:
66 (a) adopted by the State Board of Education; and
67 (b) aligned to Utah's common core.
68 (4) The board shall adopt rules for the conduct and administration of U-PASS to
69 include the following:
70 (a) the computation of student performance based on information that is disaggregated
71 with respect to race, ethnicity, gender, limited English proficiency, and those students who
72 qualify for free or reduced price school lunch;
73 (b) security features to maintain the integrity of the system, which could include
74 statewide uniform testing dates, multiple test forms, and test administration protocols;
75 (c) the exemption of student test scores, by exemption category, such as limited
76 English proficiency, mobility, and students with disabilities, with the percent or number of
77 student test scores exempted being publically reported at a district level;
78 (d) compiling of criterion-referenced, online computer adaptive, and online writing test
79 scores and test score averages at the classroom level to allow for:
80 (i) an annual review of those scores by parents of students and professional and other
81 appropriate staff at the classroom level at the earliest point in time;
82 (ii) the assessment of year-to-year student progress in specific classes, courses, and
83 subjects;
84 (iii) a teacher to review, prior to the beginning of a new school year, test scores from
85 the previous school year of students who have been assigned to the teacher's class for the new

86 school year;
87 (e) allowing a school district or charter school to have its tests administered and scored
88 electronically to accelerate the review of test scores and their usefulness to parents and
89 educators under Subsection (4)(d), without violating the integrity of U-PASS; and
90 (f) providing that scores on the tests and assessments required under Subsection (2)(a)
91 and Subsection (3) [~~shall~~] may not be considered in determining:
92 (i) a student's academic grade for the appropriate course [~~and~~]; or
93 (ii) whether a student [~~shall~~] may advance to the next grade level.
94 (5) (a) A school district or charter school, as applicable, is encouraged to administer an
95 online writing assessment to students in grade 11.
96 (b) The State Board of Education may award a grant to a school district or charter
97 school to pay for an online writing assessment and instruction program that may be used to
98 assess the writing of students in grade 11.
99 (6) The State Board of Education shall make rules:
100 (a) establishing procedures for applying for and awarding money for computer adaptive
101 tests;
102 (b) specifying how money for computer adaptive tests shall be allocated among school
103 districts and charter schools that qualify to receive the money; and
104 (c) requiring reporting of the expenditure of money awarded for computer adaptive
105 testing and evidence that the money was used to implement computer adaptive testing.
106 (7) The State Board of Education shall assure that computer adaptive tests are
107 administered in compliance with the requirements of Chapter 13, Part 3, Utah Family
108 Educational Rights and Privacy Act.
109 (8) (a) The State Board of Education shall establish a committee consisting of 15
110 parents of Utah public education students to review all computer adaptive test questions.
111 (b) The committee established in Subsection (8)(a) shall include the following parent
112 members:
113 (i) five members appointed by the chair of the State Board of Education;

114 (ii) five members appointed by the speaker of the House of Representatives; and
115 (iii) five members appointed by the president of the Senate.
116 (c) The State Board of Education shall provide staff support to the parent committee.
117 (d) The term of office of each member appointed in Subsection (8)(b) is four years.
118 (e) The chair of the State Board of Education, the speaker of the House of
119 Representatives, and the president of the Senate shall adjust the length of terms to stagger the
120 terms of committee members so that approximately 1/2 of the committee members are
121 appointed every two years.
122 (f) No member may receive compensation or benefits for the member's service on the
123 committee.
124 (9) (a) School districts and charter schools shall require each licensed employee to
125 complete two hours of professional development on youth suicide prevention within their
126 license cycle in accordance with Section 53A-6-104.
127 (b) The State Board of Education shall develop or adopt sample materials to be used by
128 a school district or charter school for professional development training on youth suicide
129 prevention.
130 (c) The training required by this Subsection (9) shall be incorporated into professional
131 development training required by rule in accordance with Section 53A-6-104.
132 Section 2. Section **53A-15-1401** is amended to read:
133 **53A-15-1401. Definitions.**
134 As used in this part:
135 (1) "Federal law" means:
136 (a) a statute passed by the Congress of the United States; or
137 (b) a final regulation:
138 (i) adopted by an administrative agency of the United States government; and
139 (ii) published in the code of federal regulations or the federal register.
140 (2) "Individualized Education Program" or "IEP" means a written statement, for a
141 student with a disability, that is developed, reviewed, and revised in accordance with the

142 Individuals with Disabilities Education Act, 20 U.S.C. Sec. 1400 et seq.
143 [~~(1)~~] (3) "LEA" means a school district, charter school, or the Utah Schools for the
144 Deaf and the Blind.
145 [~~(2)~~] (4) "Reasonably accommodate" means an LEA shall make its best effort to enable
146 a parent or guardian to exercise a parental right specified in Section 53A-15-1403:
147 (a) without substantial impact to staff and resources, including employee working
148 conditions, safety and supervision on school premises and for school activities, and the
149 efficient allocation of expenditures; and
150 (b) while balancing:
151 (i) the parental rights of parents or guardians;
152 (ii) the educational needs of other students;
153 (iii) the academic and behavioral impacts to a classroom;
154 (iv) a teacher's workload; and
155 (v) the assurance of the safe and efficient operation of a school.
156 Section 3. Section **53A-15-1402** is amended to read:
157 **53A-15-1402. Annual notice of parental rights.**
158 (1) An LEA shall annually notify a parent or guardian of a student enrolled in the LEA
159 of the parent's or guardian's rights as specified in this part.
160 (2) An LEA satisfies the notification requirement described in Subsection (1) by
161 posting the information on the LEA's website or through other means of electronic
162 communication.
163 Section 4. Section **53A-15-1403** is amended to read:
164 **53A-15-1403. Parental right to academic accommodations.**
165 (1) (a) A student's parent or guardian is the primary person responsible for the
166 education of the student, and the state is in a secondary and supportive role to the parent or
167 guardian. As such, a student's parent or guardian has the right to reasonable academic
168 accommodations from the student's LEA as specified in this section.
169 (b) Each accommodation shall be considered on an individual basis and no student

170 shall be considered to a greater or lesser degree than any other student.
171 (c) The parental rights specified in this section do not include all the rights or
172 accommodations that may be available to a student's parent or guardian as a user of the public
173 education system.
174 (d) An accommodation under this section may only be provided if the accommodation
175 is:
176 (i) consistent with federal law; and
177 (ii) consistent with a student's IEP if the student already has an IEP.
178 (2) An LEA shall reasonably accommodate a parent's or guardian's written request to
179 retain a student in kindergarten through grade 8 on grade level based on the student's academic
180 ability or the student's social, emotional, or physical maturity.
181 (3) An LEA shall reasonably accommodate a parent's or guardian's initial selection of a
182 teacher or request for a change of teacher.
183 (4) An LEA shall reasonably accommodate the request of a student's parent or guardian
184 to visit and observe any class the student attends.
185 [~~(5) (a) An LEA shall reasonably accommodate a written request of a student's parent~~
186 ~~or guardian to excuse the student from attendance for a family event or visit to a health care~~
187 ~~provider, without obtaining a note from the provider.~~]
188 [~~(b) An excused absence provided under Subsection (5)(a) does not diminish~~
189 ~~expectations for the student's academic performance.~~]
190 (5) Notwithstanding Chapter 11, Part 1, Compulsory Education Requirements, an LEA
191 shall record an excused absence for a scheduled family event or a scheduled proactive visit to a
192 health care provider if:
193 (a) the parent or guardian submits a written statement at least one school day before the
194 scheduled absence; and
195 (b) the student agrees to make up course work for school days missed for the scheduled
196 absence in accordance with LEA policy.
197 (6) (a) An LEA shall reasonably accommodate a parent's or guardian's written request

198 to place a student in a specialized class, a specialized program, or an advanced course.
199 (b) An LEA shall consider multiple academic data points when determining an
200 accommodation under Subsection (6)(a).
201 (7) Consistent with Section 53A-13-108, which requires the State Board of Education
202 to establish graduation requirements that use competency-based standards and assessments, an
203 LEA shall allow a student to earn course credit towards high school graduation without
204 completing a course in school by:
205 (a) testing out of the course; or
206 (b) demonstrating competency in course standards.
207 (8) An LEA shall reasonably accommodate a parent's or guardian's request to meet
208 with a teacher at a mutually agreeable time if the parent or guardian is unable to attend a
209 regularly scheduled parent teacher conference.
210 [~~(9) (a) Upon the written request of a student's parent or guardian, an LEA shall excuse~~
211 ~~the student from taking a test that is administered statewide or the National Assessment of~~
212 ~~Educational Progress.~~]
213 [~~(b) The State Board of Education shall ensure through board rule that neither an LEA~~
214 ~~nor its employees are negatively impacted through school grading or employee evaluation due~~
215 ~~to a student not taking a test pursuant to Subsection (9)(a).~~]
216 (9) (a) At the request of a student's parent or guardian, an LEA shall excuse a student
217 from taking an assessment that:
218 (i) is federally mandated;
219 (ii) is mandated by the state under this title; or
220 (iii) requires the use of:
221 (A) a state assessment system; or
222 (B) software that is provided or paid for by the state.
223 (b) In accordance with Title 63G, Chapter 3, Utah Administrative Rulemaking Act, the
224 State Board of Education shall make rules:
225 (i) to establish a statewide procedure for excusing a student under Subsection (9)(a)

226 that:
227 (A) does not place an undue burden on a parent or guardian; and
228 (B) may be completed online; and
229 (ii) to prevent negative impact, to the extent authorized by state statute, to an LEA or
230 an LEA's employees through school grading or employee evaluations due to a student not
231 taking a test under Subsection (9)(a).
232 (c) An LEA:
233 (i) shall follow the procedures outlined in rules made by the State Board of Education
234 under Subsection (9)(b) to excuse a student under Subsection (9)(a);
235 (ii) may not require procedures to excuse a student under Subsection (9)(a) in addition
236 to the procedures outlined in rules made by the State Board of Education under Subsection
237 (9)(b); and
238 (iii) may not reward a student for taking an assessment described in Subsection (9)(a).
239 (d) The State Board of Education shall:
240 (i) maintain and publish a list of state assessments, state assessment systems, and
241 software that qualify under Subsection (9)(a); and
242 (ii) audit and verify an LEA's compliance with the requirements of this Subsection (9).
243 (10) (a) An LEA shall provide for:
244 (i) the distribution of a copy of a school's discipline and conduct policy to each student
245 in accordance with Section 53A-11-903; and
246 (ii) a parent's or guardian's signature acknowledging receipt of the school's discipline
247 and conduct policy.
248 (b) An LEA shall notify a parent or guardian of a student's violation of a school's
249 discipline and conduct policy and allow a parent or guardian to respond to the notice in
250 accordance with Chapter 11, Part 9, School Discipline and Conduct Plans.

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** Release K-5 Library Media Standards Draft for 90-Day Public Review

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**Background:**
Elementary Library Media Standards are up for review and revision, according to the Core Standards Review Timeline.

**Key Points:**
A stakeholder committee began the review and revision of the K-5 Library Media Standards in November of 2014. The committee met a total of five times. The draft of the revised standards is now ready for Board review. The K-5 standards have been aligned to the recently approved 6-12 Library Media Standards.

**Anticipated Action:**
The Standards and Assessment Committee will receive the core revision update and consider the request to open the standards for a 90-day public comment and review period.

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# Elementary Library Media Standards

Prepared by the

Utah State Office of Education

April 9-10, 2015

DRAFT

Diana Suddreth, Director Teaching and Learning
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Jennifer Throndsen, Literacy Coordinator
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**Elementary Library Standards Review & Public Comment Approval**

**Background:** A stakeholder committee began the review and revision of the K-5 Library Media Standards in November of 2014 under the direction of Jennifer Throndsen, K-12 Literacy and Library Coordinator. The committee has met five times between November and March to work on the revisions. The committee has a broad representation of library professionals. Specifically, there are 19 committee members and they represent:

- 4-urban school districts
- 6-suburban school districts
- 3-rural school districts
- 2-charter schools
- 2-universities
- 2-parent advocates

To begin, the committee reviewed the current Elementary Library Media Standards that were adopted in 2000 and the drafts of the Secondary Library Media Standards that were just approved by the Board in February. Additionally, the American Association of School Librarians standards that were released in 2007. These three standards documents helped to guide the revision process along with essential questions related to what do we expect students in K-5 to master in the library setting and in conjunction with the classroom teacher. With those ideas in mind, the committee has drafted K-5 standards for Elementary Library Media. The standards are arranged in three strands: Reading Engagement, Information and Research, and Media Literacy.

**Request:** At this time, we would request for the Board to allow for the 90-day public comment period, so that the committee can receive feedback on the current draft. The draft standards are contained on the pages that follow.

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## Strand I: Reading Engagement

Reading is a foundational skill for learning, personal growth, and enjoyment. The degree to which students can read and understand text in all formats and all contexts is a key indicator of success in school and in life. Teacher librarians actively promote reading. They provide equitable access to literary and informational texts in a variety of subjects, genres, and formats. Teacher librarians facilitate the acquisition of tools, knowledge and skills to allow every student to read for interpretation and the development of new understandings.

**Standard 1: Students will read to gain intellectual, personal, and emotional growth.**

Objective 1.1: Establish reading behaviors for lifelong learning and growth.

a) Select texts from a variety of formats and genres to read for enjoyment, acquire knowledge, and answer questions.
b) Gain understanding and make connections while reading and interacting with text.
c) Demonstrate perseverance and stamina when reading or listening to a variety of texts.
d) Listen to, view, read, and integrate information to build a knowledge base.

Objective 1.2: Differentiate between literary (fiction) and informational (non-fiction) text.

a) Categorize text as literary or informational.
b) Use selection criteria (e.g., interest, content) when choosing materials for a defined purpose.
c) Apply appropriate reading strategies for comprehension of text. (e.g., text features, skim and scan)

**Standard 2: Students explore a variety of reading materials to learn how formatting and features contribute to and give meaning to the text.**

Objective 2.1: Demonstrate knowledge of the physical features (e.g., cover, spine, title page, cursor, and scroll bar) of reading materials, both electronic and print.
Objective 2.2: Read, view and listen for information presented in a variety of formats (e.g., textual, visual, media) and apply appropriate strategies to comprehend texts.
Objective 2.3: Identify the elements of story while analyzing how and why characters, events, and ideas develop and interact over the course of a text.
Objective 2.4: Identify the roles, tools, and purposes of authors, illustrators, and other contributors (e.g., website creators, editors, publishers) to a text.

**Standard 3: Students will demonstrate an understanding of library purpose and function.**

Objective 3.1: Exhibit library etiquette.
Objective 3.2: Understand the library layout, the library classification system, and the circulation process.
Objective 3.3: Contribute to a reading and learning community, including recommending reading materials to peers and respecting others' reading choices.
Objective 3.4: Make use of personal, community and global libraries, both physical and electronic.

## Strand II: Information and Research

Through engagement in the research process, students will apply critical thinking skills (e.g., analysis, synthesis, evaluation, organization) to construct new understandings, draw conclusions, and create new knowledge. Teacher librarians, in collaboration with classroom teachers, will engage students in research processes (e.g., inquiry-based, information problem solving). Such experiences will develop student self-confidence in solving problems in an environment where information resources and technologies are increasingly complex.

**Standard 1 – Students will define an information problem and identify information needed.**

Objective 1.1: Define an information problem.

a) Analyze the task to identify the information problem.
b) Seek clarification from teachers and others.
c) Select and narrow (or broaden) topics into a manageable focus.
d) Conceptualize the form of the final product based on target audience and criteria for evaluation.

Objective 1.2: Identify the information needed.

a) Analyze the task and information needed.
b) Generate essential questions for new understanding and to guide inquiry.
c) Select, narrow (or broaden) keyword search terms.

**Standard 2 – Students will identify, evaluate, and select sources.**

Objective 2.1: Brainstorm and identify information sources (e.g., texts, places, people).
Objective 2.2: Evaluate and select sources based on predetermined criteria (e.g., relevancy, currency, credibility).

**Standard 3 – Students will locate sources and access information.**

Objective 3.1: Locate identified sources.

a) Demonstrate how to navigate library catalogs, web browsers, and databases.
b) Apply effective location skills, asking for help as needed.
c) Revise and focus search as necessary.

Objective 3.2: Access information within sources by applying relevant tools (e.g., table of contents, indexes, keyword searches, sidebars, related subjects).

**Standard 4 – Students will engage with and extract information.**

Objective 4.1: Engage with information by reading, listening, and viewing sources in a variety of formats.

a) Build connections between prior knowledge and new information through engaging with information, and collaborating with others to broaden and deepen understanding.
b) Monitor gathered information for gaps or weaknesses and modify questions, sources, or strategies as needed to accomplish the research task successfully.

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Objective 4.2: Select, extract and record information that addresses the information problem, answers guiding questions, and meets evaluation criteria.

a) Apply critical thinking skills to evaluate and select information in terms of relevance, currency, and credibility including fact and opinion, bias, prejudice, propaganda.
b) Validate and compare information in sources, noting differences, contradictions, types of data or research.
c) Use a variety of note-taking strategies, including summarizing and paraphrasing, while noting sources.

**Standard 5 – Students will organize, synthesize, and present information.**

Objective 5.1: Organize information from multiple sources.

a) Organize, evaluate, and synthesize selected information to support conclusions.
b) Select format of the learning product for the designated audience and use technology or other tools to integrate, organize, and present information from multiple sources.
c) Follow ethical and legal guidelines in using and citing information to avoid plagiarism and copyright violations.
d) Apply evaluation criteria to create, revise, and finalize the learning product.

Objective 5.2: Present learning product using a variety of presentation techniques (e.g., writing, speaking, media) to communicate new understandings.

**Standard 6 – Students will evaluate their process and product.**

Objective 6.1: Evaluate the execution of the process and product for efficacy and quality.

a) Assess and reflect on ability to meet the evaluation criteria.
b) Assess ability to select sources that are relevant, current, and credible.
c) Solicit, reflect, and act upon peer reviews and teacher comments about the product.

Objective 6.2: Identify areas of the process and product that were successfully executed, as well as those needing improvement, to determine how to proceed in the future.

a) Reflect upon how the product could be improved or modified.
b) Reflect upon and describe the level of personal satisfaction with the process and product.
c) Identify areas of personal growth, technology and time-management skills, including the ability to collaborate.

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## Strand III Literacy: Media Engagement

Media literacy is the competent application of literacy skills to media and technology messages. Its goal is to help individuals of all ages develop the habits of inquiry and skills of expression that they need to be critical thinkers, effective communicators, and active, digital citizens in today's world. By learning the standards and objectives, students will acquire an understanding of the elements, construction, and potential impact of media messages while learning to make informed choices in the use of media. Teacher librarians, in collaboration with classroom teachers, can integrate these standards into curricular units throughout a wide range of subjects to ensure students are equipped with these essential 21st century skills.

**Standard 1 – Awareness: Students will be aware that media literacy as a life skill is integral to modern citizenship and informed decision making.**

Objective 1.1: Define basic terms and concepts of media.
Objective 1.2: Understand how the use of media can broaden experiences throughout life.
Objective 1.3: Identify and explain the rights and responsibilities with respect to media and digital citizenship.
Objective 1.4: Recognize that people experience the same message differently.
Objective 1.5: Recognize that media messages are intentionally constructed.

**Standard 2 – Analysis: Students analyze, question, and think critically about media messages.**

Objective 2.1: Analyze techniques used to construct media messages.
Objective 2.2: Analyze the impact of media messages on a receiver.

**Standard 3 – Evaluation: Students evaluate elements of media messages.**

Objective 3.1: Evaluate media messages for accuracy, authenticity, relevance, and source authority.
Objective 3.2: Evaluate and select media for personal and educational use.

**Standard 4 – Production: Students produce and present media messages.**

Objective 4.1: Students identify messages for presentation, using a multi-step process, by determining intent, content, audience, and length.
Objective 4.2: Students develop and apply criteria for quality media productions.
Objective 4.3: Students create, present, and evaluate the final product.

**Standard 5 – Digital Citizenship: Students understand personal responsibilities and consequences of media usage.**

Objective 5.1: Students understand and practice safe and responsible use of information and technology.
Objective 5.2: Students identify issues and consequences of misusing media.

DRAFT

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** Standards Review Committee Recommendations for Physical Education

---

**Background:**
In accordance with Utah State Code 53A-1-402.8, a Standards Review Committee for Physical Education was convened on October 30, 2014. The committee also met on January 29, 2015. The committee recommended using a focus group of elementary classroom teachers to review the core and make recommendations. This focus group met March 11, 2015.

**Key Points:**
The Standards Review Committee for Physical Education K-12 has been completed according to 53A-1-402.8. The Standards Review Committee recommendations, which included a classroom teacher focus group have been reviewed, revised and are ready for State Board of Education review.

**Anticipated Action:**
The Board will review recommendations from the Standards Review Committee and direct staff in response to those recommendations in anticipation of receiving a draft of the revised standards at an upcoming Board meeting.

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# Physical Education Core Standards Revision Update

Prepared by the

Utah State Office of Education

April 9-10, 2015

Diana Suddreth, Director Teaching and Learning
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Linda Mayne, Physical Education Specialist Teaching and Learning
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# K-12 Physical Education Standards Review Committee Report

The Standards Review Committee for K-12 Physical Education has been completed as required by Utah State Code Section 53A-1-402.8. Members of this committee represented various stakeholders, invited to be on the committee by invitation from the Utah State Senate, the Utah House of Representatives, and from the Utah State Board of Education. On October 30, 2014, the committee was convened. Members used copies of the core standards to work in teams and provide specific feedback related to the standards. They also shared input received from parents, students, teachers, and other stakeholders. The committee members submitted comments regarding the 7th and 8th grade core during the months of November and December and held their second meeting on January 29, 2015. Between the two meetings original members who were also serving on writing committees were replaced to avoid conflicts of interest.

In general the consensus was in support of the standards; however, much discussion ensued regarding the difference between standards and curriculum, prohibition of Dodge Ball, and expecting multiple skills in a single activity. Some parents were concerned about issues unrelated to the P.E. Standards such as the Common Core and data collection.

As a result of the two meetings, the Standards Review Committee recommends the following:

- Maintain the format showing a scope and sequence.
- Attend to concerns around the rigor of skill development and realistic expectations for teachers.

The Standards Review Committee requests the Board also consider the following recommendations which are based on the opinion of the majority of the committee, but where consensus was not reached:

- Provide a glossary of terms that are unfamiliar to K-6 regular classroom teachers.
- Create a focus group to identify vocabulary and teaching terms unfamiliar to the K-6 regular classroom teacher.
- Investigate combining objectives in standard one.

# Physical Education Standards Review Committee Membership

## Members appointed by Senate President Wayne Neiderhauser:

Renee Green
Jill Jaeger
Christie Moore
Laura Perry

## Members Appointed by House Speaker Rebecca Lockhart

Don Baker
Laurel Bartmess
Scott Daw
Denise Roney
Mike Watts

## Members Appointed by the Utah State Board of Education

Bruce Brinkman, PE Specialist, Salt Lake City School District
Jane Ellen Lindhout, Curriculum Specialist, Alpine School District
Dave Vandeveetaete, PE Specialist, Granite School District
Jay Welk, Health/PE/Driver's Education Specialist, Davis School District

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** Standards Review Committee Recommendations for Secondary Social Studies

---

**Background:**
In accordance with Utah State Code 53A-1-402.8, a Standards Review Committee for Secondary Social Studies was convened on October 7, 2014. The committee also met on March 30, 2015.

**Key Points:**
The Standards Review Committee's statutory obligations call for a review of existing standards prior to any revision. However, the social studies standards revision process had begun prior to the legislation that created this committee. Therefore, the Standards Review Committee will make recommendations regarding the existing core standards as well as provide recommendations regarding the initial drafts of the revisions.

**Anticipated Action:**
The Standards and Assessment Committee will review recommendations from the Social Studies Standards Review Committee and direct staff in response to those recommendations, in anticipation of receiving a draft of the revised standards at an upcoming Board meeting.

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# Secondary Social Studies Core Standards Revision Committee Report

Prepared by the

Utah State Office of Education

April 9-10, 2015

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Robert Austin, K-12  Social Studies Specialist
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# Secondary Social Studies Standards Review Report

The Standards Review Committee for Secondary Social Studies has been completed according to 53A-1-402.8. The committee met on October 7, 2014 to begin the review process. Recommendations from that meeting were sent to the writing teams. The committee met a second time on March 30, 2015 to complete these recommendations to the Board. After a review of the current Secondary Social Studies Standards, a draft revision document, discussions, and specific recommendations, the committee submits the following information.

The committee recognized the need to update the current standards in order to reflect the skills, knowledge and attributes Utah students should gain through study in the Social Studies.

**Social Studies Recommendations**

The committee affirmed the direction the writing team is taking in rewriting the standards. In addition, the Standards Review Committee recommends the following actions be taken in the revision of the core standards. These recommendations represent the consensus of the committee.

1. Schedule the comment period during the school year. Begin the 90-day public comment period no earlier than August to allow for teacher and parent review.
2. Include the four strands of social studies (history, geography, economics, and civics) explicitly within the essential questions (objectives) for each standard.
3. Include historical thinking skills and disciplinary practice standards as a support for college, career, and civic readiness.
4. Use the proposed format of organizing the core under enduring understandings, performance standards, and essential questions.
5. Ensure the new standards include recognition of contributions and history of diverse groups.

# Secondary Social Studies Standards Review Committee Membership

Members appointed by the Senate

Daniel Brownell
Jennie Hendricks
Alisha Jensen
Tanya Peters
Karen Peterson

Members appointed by the House

Denise Carman
Amelia Powers
Kimberly Wagner
Shauna Warnick

Members Appointed by the Utah State Board of Education

Jeanie Groves, Alpine School District (CMAC)
Christopher Hall, Davis School District
Roderic Land, University of Utah (CMAC)
Yudi Lewis, Utah Valley University
Axel Ramirez, Utah Valley University
Wendy Rex-Atzet, Utah State Historical Society
Pamela Su'a, Jordan School District

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Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**ACTION:** Standards Review Committee Recommendations for Fine Arts

---

**Background:**
In accordance with Utah Code 53A-1-402.8, a Standards Review Committee for Elementary and Secondary Fine Arts was convened on October 28, 2014. The committee also met on March 10, 2015.

**Key Points:**
At its March 10, 2015 meeting the Standards Review Committee reached consensus on recommendations to changes in the existing Utah Core Standards for Fine Arts. Those recommendations are now available for Board review.

**Anticipated Action:**
The Standards and Assessment Committee will review recommendations from the Standards Review Committee and direct staff in response to those recommendations, with the anticipation of receiving a draft of the revised standards at the next Board meeting

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# Fine Arts Core Standards Revision Committee Report

Prepared by the

Utah State Office of Education

April 9-10, 2015

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Cathy Jensen, BTS and Fine Arts Specialist
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# Fine Arts Standards Review Report

The Standards Review Committee for Fine Arts has been completed according to 53A-1-402.8. The committee met on October 28, 2014 to begin the review process. Recommendations from that meeting were sent to the writing teams. The committee met a second time on March 10, 2015 to complete these recommendations to the Board. After a review of the current Fine Arts Standards, discussions, and specific recommendations, the committee submits the following information.

The committee recognized the need to update the current standards in order to reflect the skills, knowledge and attributes Utah students should gain through study in the Fine Arts. Consensus was reached that the Fine Arts serve to develop twenty-first century skills essential to success in today's world.

The Standards Review Committee recommends the following actions be taken in the revision of the cores standards. These recommendations represent the consensus of the committee.

- The Fine Arts Standards should be revised using a number of resources including the National Coalition for Core Arts Standards, standards from other states and most recent research.
- The standards should lead to the acquisition of the twenty-first century skills of creativity, collaboration, communication and critical thinking
- Specific arts standards should be written for grades K-2 to replace the current integrated statement.
- Writing teams should continue their work based on the Guiding Principles and Anchor Standards documents.
- Media Arts standards should be written and adopted as a free-standing arts discipline across K-12.

The Standards Review Committee also noted the following, which were outside the charge of the committee, but deemed important.

- Accountability measures other than standardized testing should be put in place to ensure every student receives education in the arts as core subjects.
- Universities and colleges must be required to adequately prepare pre-service elementary teachers to instruct in the arts.
- Professional learning opportunities and resources must be provided in order for elementary teachers to unpack the standards and provide instruction in the arts.
- School and LEA administrators should understand the essential role the arts play in a well-rounded education.
- Secondary arts educators must be provided professional learning opportunities to align their practice with the new standards.

# Fine Arts Standards Review Committee Membership

Members appointed by the Senate

Kurt Bestor

Kirk Cullimore

Mark Drawe

Heather Gardner

Shellie Giddings

Amy Nydegger

Rhonda Perkes

Members appointed by the House

Emily King

Ann Meeks

Members appointed by the Utah State Board of Education

Dr. Randy Boothe, Brigham Young University

Lisa Cluff, Art Works for Kids

Gayleen Gandy, Granite District Board of Education

Pamela Gee, Utah Festival Opera and Musical Theatre

Jean Tokuda Irwin, Utah Division of Arts and Museums

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Brad C. Smith, Chief Executive Officer
Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**INFORMATION:** FFY 2013 IDEA Part B Annual Performance Plan (APR) and State Systemic Improvement Plan (SSIP)

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**Background:**
Under the Individuals with Disabilities Education Improvement Act (IDEA), each State must report on its annual performance on the 15 compliance and performance indicators of the State Performance Plan (SPP). Utah submitted its FFY 2013 APR on February 2, 2015, using data regarding State, LEA, and student performance collected during the 2012-2013 and 2013-2014 school years. Both the APR and SPP may be found at http://schools.utah.gov/sars/Quick-Links/Performance-Plan.aspx.

**Key Points:**

- Utah continues to be in substantial compliance with IDEA requirements.
- There was a slight decrease from FFY 2012 in Least Restrictive Environments (LRE) for students with disabilities ages 3-5, surveyed parents who felt that schools facilitated their involvement as a means of improving services for their students, and post-school enrollment in post-secondary education.
- Phase I of the SSIP was submitted on April 1, 2015 and includes a State-identified Measurable Result (SiMR) that targets improved mathematics proficiency for students with Speech Language Impairments (SLI) or Specific Learning Disabilities (6-8) in grades 6-8. Phase II of the SSIP will be due in February 2016.
- LEAs will receive their annual determinations in April 2015 with associated data to assist in developing improvement plans.

**Anticipated Action:**
The Standards and Assessment Committee will receive this information. No formal action is required.

**Contact:** Glenna Gallo, Director of Special Education, 801-538-7757

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

# Utah State Systemic Improvement Plan (SSIP)
# FFY 2013
# Summary

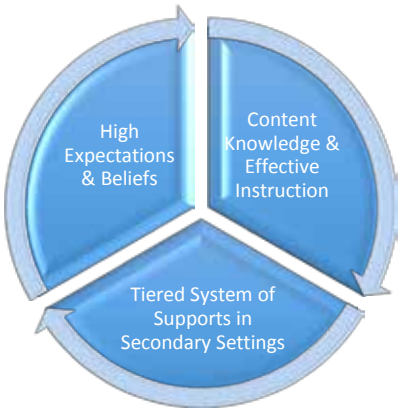
Utah's Phase I plan for the State Systemic Improvement Plan (SSIP) describes the state system and its capacity to assist Local Education Agencies (LEAs) to develop the needed capacity to improve outcomes for students with disabilities. These improvement efforts align with the Individuals with Disabilities Education Act (IDEA) and Elementary and Secondary Education Act (ESEA). The State-identified Measurable Result (SiMR), selected by stakeholders, is as follows:

> *Utah will increase the percentage of students with Speech Language Impairment (SLI) or Specific Learning Disabilities (SLD) in grades six through eight who are proficient on the SAGE mathematics assessment by 11.11% over a five year period.*

**Utah SAGE Results 2013–2014**

| Subject Area | Subgroup | Percent Proficient | |
|---|---|---|---|
| Mathematics (3–8, 10) | All students | 38.8% | |
| | Students without Disabilities | 42.2% | **Difference/Gap = 29.3%** |
| | Students with Disabilities | 12.9% | |

State broad and in-depth data, considered along with stakeholder feedback, LEA in-depth data review results, and Utah Least Restrictive Environment (LRE)/placement data (which show a decline in the number of students with disabilities spending 80% or more of their school day in the general education classroom starting in grades five through six and continuing through high school), suggest that Utah stakeholders accurately attribute Utah's low levels of mathematics proficiency for students with disabilities to:




1. Administrator, teacher, parent, and student attitudes and behavior (resulting in some IEP team decisions that limit grade level core mathematics instruction);
2. Teacher understanding of mathematics standards and effective instruction; and
3. An educational system that decreases general education instructional support and interventions in the secondary settings, during a time when the mathematics core standards become more rigorous and abstract.

Utah will achieve the SiMR through a focus on implementing cohesive improvement strategies designed to increase High Expectations and Beliefs; Content Knowledge and Effective Instruction, and Tiered System of Supports in Secondary Settings.

# Utah State Systemic Improvement Plan (SSIP)
# FFY 2013
# Summary

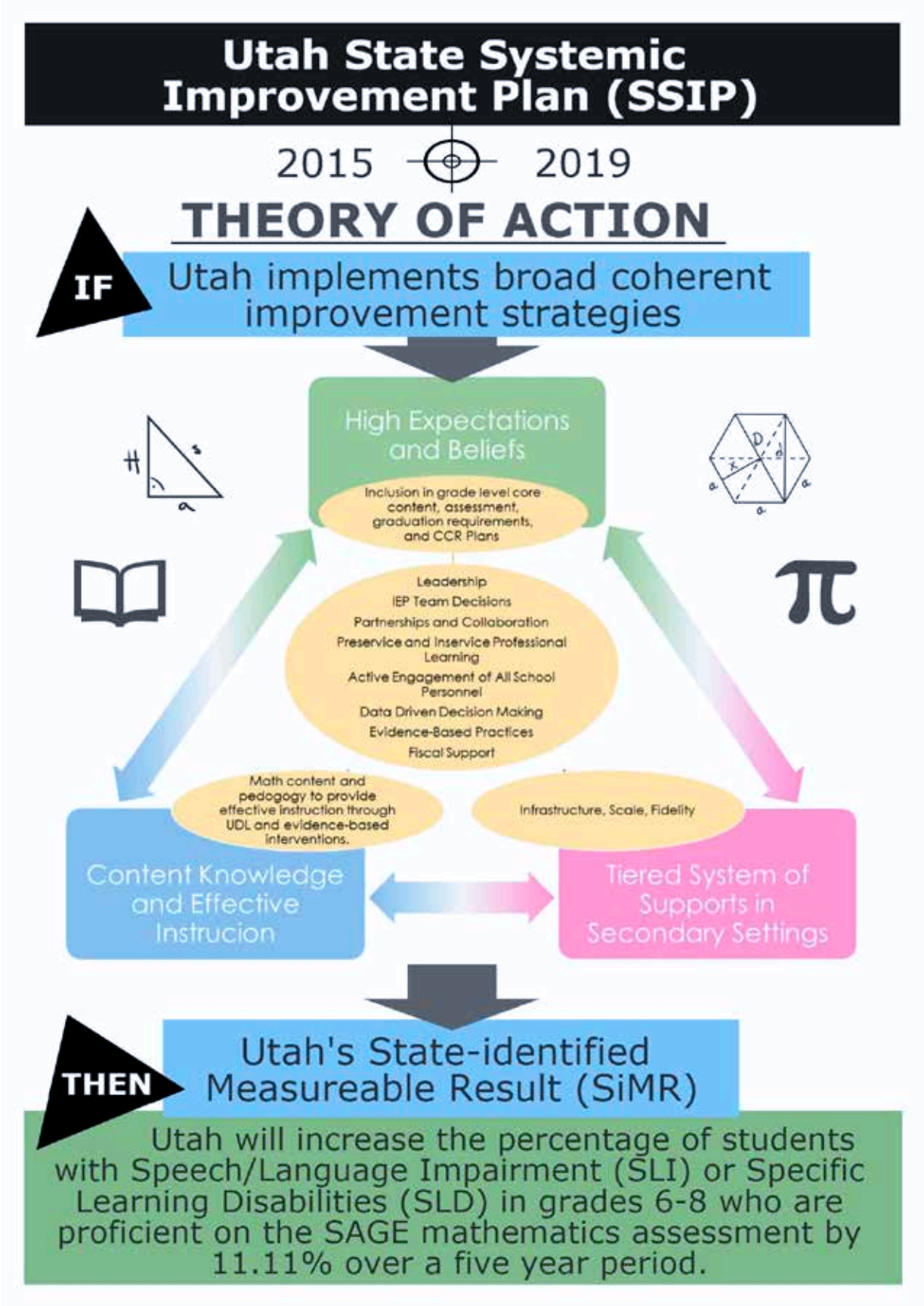
| High Expectations & Beliefs | Content Knowledge & Effective Instruction | Tiered System of Supports in Secondary Settings |
|---|---|---|
| Inclusion in grade-level core, assessment, graduation requirements, and CCR Plans. | Math content and pedagogy to provide effective instruction through UDL, evidence-based interventions | Infrastructure, scale, and fidelity |
| Leadership<br>Partnerships & Collaboration<br>Preservice & Inservice Professional Learning<br>Data & Evidence-Based Practices & Decisions<br>Active Engagement of All School Personnel<br>IEP Team Decisions<br>Fiscal Support | | |

The success of the SSIP requires systematic improvement across the USOE and LEAs to leverage existing strengths while simultaneously closing system gaps. For this to occur, the USOE and LEAs need to:

- Increase capacity to implement the SSIP,
- Increase utilization of evidence-based practices,
- Improve infrastructure and coordination for delivering effective professional development (PD) and technical assistance (TA),
- Increase the use of effective dissemination strategies,
- Increase meaningful engagement of state and local stakeholders around SSIP efforts,
- Increase capacity to effectively utilize available TA resources, and
- Increase capacity to implement general supervision systems that support effective implementation of the IDEA and ESEA.

Combined improvement efforts, chronicled in the full SSIP, will lead to improved educational outcomes for all students in the area of mathematics proficiency. Utah's Theory of Action, a graphic plan of how selected improvement strategies will be utilized to address the three identified root causes of the current performance, follows.

Utah State Systemic Improvement Plan (SSIP)
FFY 2013
Summary



# Utah State Systemic Improvement Plan (SSIP)
# FFY 2013
# Summary

This summary addresses Phase I of the three part plan. Phase II completion is required by February 2016, with completion of the overall SSIP (i.e., Phase III) reporting required annually and completed by 2019. The complete FFY 2013 SSIP Phase I report, with accompany details, may be found at http://www.schools.utah.gov/sars/Data/Performance/Reports.aspx.

# Utah Annual Performance Report (APR)
# FFY 2013
# Summary

| Indicator | State Data for FFY 2013 | Target for FFY 2013 | Target Met? | Progress/Slippage/Maintained |
|---|---|---|---|---|
| **1**<br>**Graduation** | 65.02% | 71.8% or 2 percentage points improvement (i.e., 62.13%) | Yes; improvement goal was met | Progress (FFY 2012 = 60.91%) |
| **2**<br>**Dropout** | 6.89% | ≤6.89% | Yes | Progress (FFY 2012= 4.5 7.7%) |
| **3A**<br>**Assessment AMO** | M 3-8=49.55%<br>M 10= 41.67%<br>ELA 3-8=41.07%<br>ELA 10=35.00% | N/A | N/A | FFY 2013 Baseline data |
| **3B**<br>**Assessment**<br>**Participation** | ELA =97.01%<br>Math =96.68 | 95.00%<br>95.00% | Yes<br>Yes | Slippage (FFY 2012 = 99.56%)<br>Slippage (FFY 2012 = 99.70%) |
| **3C**<br>**Assessment**<br>**Proficiency** | M 3-8=19.52%<br>M 10=0.55%<br>ELA 3-8= 16.70%<br>ELA 10=12.82%<br>*CAUTION: DATA ERRORS | N/A | N/A | FFY 2013 Baseline data |
| **4A**<br>**Discipline** | 0.00% | 0.0% | Yes | Maintained (FFY 2012 = 0.00%) |
| **4B**<br>**Discipline** | 0.00% | 0.0% | Yes | Maintained (FFY 2012 = 0.00%) |

| | | | | |
|---|---|---|---|---|
| **5A**<br>**LRE (6-21)**<br>**>80%** | 56.81% | 56.81% | Yes | Progress (FFY 2012 = 56.35%) |
| **5B**<br>**LRE (6-21)**<br>**<40%** | 13.57% | ≤13.57% | Yes | Progress (FFY 2012 = 13.48%) |
| **5C**<br>**LRE (6-21)**<br>**Separate School** | 2.59% | <3.00% | Yes | Progress (FFY 2012 = 2.79%) |
| **6A**<br>**LRE (3-5)** | 33.02% | 33.02% | Yes | Slippage (FFY 2012 = 40.58%) |
| **6B**<br>**LRE (3-5)** | 43.76% | ≤43.76% | Yes | Slippage (FFY 2012 = 38.01%) |
| **7A**<br>**Preschool Outcomes**<br>**Positive Social Emotional** | 90.52%<br>51.20% | 90.52%<br>51.20% | Yes<br>Yes | Progress (FFY 2012 = 88.51%)<br>Progress (FFY 2012 = 45.89%) |
| **7B**<br>**Preschool Outcomes**<br>**Acquisition and Use of Knowledge and Skills** | 89.96%<br>44.79% | 89.96%<br>44.79% | Yes<br>Yes | Progress (FFY 2012 = 87.95%)<br>Progress (FFY 2012 = 40.30%) |
| **7C** | 90.70%<br>62.97% | 90.70%<br>62.97% | Yes<br>Yes | Progress (FFY 2012 = 88.42%)<br>Progress (FFY 2012 = 57.69%) |

Utah Annual Performance Report (APR)
FFY 2013
Summary

| | | | | |
|---|---|---|---|---|
| **Preschool Outcomes**<br><br>**Appropriate Behaviors** | | | | |
| **8**<br><br>**Parent Input** | 86.06% | 86.04% | Yes | Slippage (FFY 2012 = 89.83%) |
| **9**<br><br>**Disproportionality** | 0.0% | 0.0% | Yes | Maintained (FFY 2012 = 0%) |
| **10**<br><br>**Disproportionality** | 0.0% | 0.0% | Yes | Maintained (FFY 2012 = 0%) |
| **11**<br><br>**Compliance** | 99.65% | 100% | No | Progress (FFY 2012 = 98.88%) |
| **12**<br><br>**Compliance** | 99.75% | 100% | No | Progress (FFY 2012= 99.36%) |
| **13**<br><br>**Compliance** | 98.12% | 100% | No | Progress (FFY 2012 = 87.72%) |
| **14A**<br><br>**Post-School Outcomes** | 24.50% | 24.50% | Yes | Slippage (FFY 2012 = 27.60%) |
| **14B**<br><br>**Post-School Outcomes** | 67.67% | 67.67% | Yes | Progress (FFY 2012 = 66.30%) |
| **14C**<br><br>**Post-School Outcomes** | 81.83% | 81.83% | Yes | Progress (FFY 2012 = 81.01%) |

# Utah Annual Performance Report (APR)
# FFY 2013
# Summary

The complete FFY 2013 APR report, with accompany details, may be found at http://www.schools.utah.gov/sars/Data/Performance/Reports.aspx.

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Brad C. Smith, Chief Executive Officer
Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**DISCUSSION/ ACTION:** New Board Rules and Rule Changes Needed as a Result of Legislation

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**Background:**
The 2015 General Session of the Legislature ended March 12, 2015. Many bills relating to education were passed during the session. It is necessary for the Board to develop new Board rules or make changes to existing rules to be consistent with the legislation passed.

**Key Points:**
Staff will provide a summary of education-related legislation passed during the 2015 Legislative Session and actions required by the Board as a result of that legislation.

**Anticipated Action:**
The Committee will review the list and give direction to staff regarding a timeline for rules to come to the Board and the changes required.

**Contact:** Brad Smith, 801-5387510
Sydnee Dickson, 801-538-7515
Angie Stallings, 801-538-7656

250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7517 Fax: (801) 538-7768

| Bill Details | | | | Committee Assignment | | | |
|---|---|---|---|---|---|---|---|
| **NUMBER** | **BILL NAME** | **REP./SEN.** | **SUMMARY** | **Audit** | **Finance** | **S & A** | **L & L** |
| **HB0030** | Math Teacher Training Program Amendments | Edwards | Expands a program allowing a grant to be used to assist experienced math teachers to become teacher leaders. | | | | |
| **HB0033** | American Indian-Alaskan Native Education Amendments | Draxler | Provides for American Indian – Alaskan Native Education State Plan and establishes duties and reporting requirements. | | | | |
| **HB0105 S1** | Antidiscrimination Modifications | Miller | Adds pregnancy, childbirth, and breastfeeding to the Utah Antidiscrimination Act. | | | | |
| **HB0124 S1** | Education Background Check Amendments | Handy | Clarifies and amends background check provisions, requirements, and notifications for LEAs and individuals. | | | | |
| **HB0128** | Maintenance Of Student Records | Froerer | Amends provisions related to a record a school maintains to verify that a parent was notified of certain incidents or threats. | | | | |
| **HB0163** | Student Data Breach Requirements | Knotwell | Requires notification if personally-identifiable student data is breached. | | | | |
| **HB0174, HB0291S3, HB0409S1, SB0121S1** | Procurement Code Amendments | Stratton, Stuart, Snow, Mayne | Requires various modifications to procurement code. | | | | |
| **HB0197 S1** | Educator Licensing Amendments | Coleman | Requires the State Board of Education to make certain rules regarding administrative or supervisory licensing; and makes technical changes | | | | |
| **HB0198** | Strengthening College and Career Readiness | Arent | Creates a program to provide grants to local education agencies for professional development for school counselors. | | | | |
| **HB0203 S1** | Teacher Salary Supplement Program Amendments | Last | Amends provisions related to the Teacher Salary Supplement Program, including the amount of supplement and entity that distributes money for the program. | | | | |
| **HB0213 S2** | Safe Technology Utilization and Digital Citizenship in Public Schools | Stratton | Amends provisions related to educational technology and school community council and expands uses of School LAND Trust Program funds. | | | | |
| **HB0242** | State and Local Government Employee Policies | Miller | Enacts language related to the accommodation of public employees who are breastfeeding. | | | | |
| **HB0282 S1** | Online Education Program Amendments | Daw | Expands the entities that may offer secondary school level and concurrent enrollment courses through the Statewide Online Education Program and authorizes institutions within the state system of higher education to offer secondary school level and concurrent enrollment courses through the Statewide Online Education Program. | | | | |

| Bill Details | | | | Committee Assignment | | | |
|---|---|---|---|---|---|---|---|
| **NUMBER** | **BILL NAME** | **REP./SEN.** | **SUMMARY** | **Audit** | **Finance** | **S & A** | **L & L** |
| **HB0345 S2** | Education Abuse Policy | McCay | Modifies provisions related to school personnel employment and licensing procedures and student abuse reporting. (UPPAC). | | | | |
| **HB0360 S1** | Utah Education Amendments | Christensen | Enacts provisions related to statewide education policy; requires the State Board of Education to: generate a report regarding the history of the state public education system; create a 10-year plan; and report to the Education Interim Committee; removes nonvoting members from the State Board of Education and requires the Board to meet quarterly with certain individuals; amends provisions relating to academic standards established by the Board and curriculum in public schools; provides for education entities to meet certain requirements when establishing certain national programs or standard. | | | | |
| **SB0038** | Behavioral Testing And Tracking Restrictions | Osmond | Eliminates references to behavioral testing or tracking in public schools; and makes technical changes. | | | | |
| **SB0060 S2** | American Civics Education Initiative | Stephenson | Requires an individual to pass the basic civics test as a condition for receiving a high school diploma or adult education secondary diploma. | | | | |
| **SB0204 S2** | Parental Rights In Public Education Amendments | Osmond | Amends provisions related to certain rights of a parent or guardian of a student enrolled in a public school and provisions related to achievement tests. | | | | |
| **SB0235 S2** | School Turnaround and Leadership Development | Niederhauser | Enacts and amends provisions related to turning around low performing schools and developing school leaders. | | | | |
| **SB0245 S1** | School Grading Amendments | Millner | Exempts the USDB from school grading; requires the State Board of Education to annually evaluate the USDB in accordance with an accountability plan approved by the State Board; provides an alternative grade distribution for the 2014-15 school year only; amends provisions related to calculating student growth. | | | | |

**BOARD MEETING**

**Friday, April 10, 2015**

*8:00 a.m. to 8:15 a.m.*

4. **Opening Business**
    - Pledge of Allegiance
    - Board Member Message
    - Introduction of New Employees
    - Acknowledgment of Student Artwork

*8:15 a.m. to 8:25 a.m.*

5. **Recognition**

*8:25 a.m. to 8:35 a.m.*

6. **Public Participation/Comment**

    Priority shall be given to those individuals or groups, who, prior to the day of the meeting, have submitted a request to address the Board. Sign up is available the day of the meeting before 8:00 a.m.

*8:35 a.m. to 8:40 a.m.*

7. **ACTION:** Approval of Appointments to the Utah State Office of Rehabilitation

*8:40 a.m. to 8:45 a.m.*

8. **ACTION:** General Consent Calendar (backup furnished electronically at http://www.schools.utah.gov/board/Meetings.aspx). Tab 8

*8:45 a.m. to 9:00 a.m.*

9. **INFORMATION/ACTION:** Report from North Sanpete School Board

*9:00 a.m. to 9:15 a.m.*

10. **INFORMATION:** Utah Schools for the Deaf and the Blind Quarterly Report Tab 10

*9:15 a.m. to 11:30 a.m.*

11. **DISCUSSION:** 2015 Legislative Session Tab 11
    - Legislative Appropriations Review - USOE and USOR

    **BREAK**

    - Legislative Bill Review

*11:30 a.m. to 11:45 a.m.*

12. **ACTION:** Board Audit Committee Report

*11:45 p.m. to 11:55 p.m.*

13. **ACTION:** Utah Professional Practices Advisory Commission Cases Tab 13

*11:55 p.m. to 12:30 p.m*

**LUNCH**

*12:30 p.m. to 1:30 a.m.*

14. **ACTION:** Committee Reports
    - Finance Committee
    - Law and Licensing Committee
    - Standards and Assessment Committee

*1:30 p.m. to 1:50 p.m.*

15. **INFORMATION:** Update on Educator Effectiveness Tab 15

*1:50 p.m. to 2:05 p.m.*

16. **INFORMATION**: Superintendent's Report
    - Risk Mitigation Plan Tab 16

*2:05 p.m. to 2:15 p.m.*

17. **INFORMATION:** Board Chair's Report

*2:15 p.m. to 2:30 p.m.*

18. **INFORMATION:** Board Member Closing Comments

*2:30 p.m. to 3:30 p.m.*

19. **EXECUTIVE SESSION**

3*:30 p.m. to 3:40 p.m.*

20. **ACTION:** Executive Session Items
    - UPPAC Cases
    - Appointments

*3:40 p.m.*

21. **ADJOURNMENT**

**General Consent Calendar**
April 10, 2015

Backup furnished electronically at http://www.schools.utah.gov/board/Meetings/Agenda.aspx

A. Minutes of Previous Meeting Tab A

Minutes of the Utah State Board of Education meetings held January 29, 2015, February 12, 2015, February 19, 2015, March 5-6, 2015 and March 19, 2015 are presented for approval.

B. Monthly Budget Report Tab B

A monthly budget report is provided to give information to the Board in meeting its fiduciary responsibilities for the Utah State Office of Education, Utah State Office of Rehabilitation, and Utah Schools for the Deaf and the Blind. It is proposed that the Board receive the report.

C. Contracts Tab C

It is proposed that the Board approve the following contracts:

1. National Staff Development Council, $239,825, 04/01/2015 to 03/31/2020

   To support the state in auditing the quality and impact of professional learning experienced by educators in Utah public schools.

2. SR Plus Consulting, LLC, $92,060.41, 04/01/2015 to 03/31/2020

   To provide Individuals with Disabilities Act (IDEA) behavior support services to local education agencies and the Utah State Office of Education Special Education Section.

3. Echo Cunningham, $229,354.67, 04/01/2015 to 03/31/2020

   To provide Individuals with Disabilities Act (IDEA) behavior support services to local education agencies and the Utah State Office of Education Special Education Section.

4. iBehaveConsulting, Inc., $283,507.85, 04/01/2015 to 03/31/2020

   To provide Individuals with Disabilities Act (IDEA) behavior support services to local education agencies and the Utah State Office of Education Special Education Section.

5. USU Special Education & Rehab - Utah Behavior Clinic, $286,693.33, 04/01/2015 to 03/31/2020

   To provide Individuals with Disabilities Act (IDEA) behavior support services to local education agencies and the Utah State Office of Education Special Education Section.

6. Education Direction, $4,061,412.55, 05/01/2015 to 04/30/2020

   To work with the USOE to develop and implement professional learning experiences for schools and districts to assist them in effectively using data to improve student achievement.

D. Contract Reports Tab D

It is proposed that the Board receive the following reports: *Contracts approved by State Superintendent or USOR Director (less than $100,000)* and *USOE/USOR Expiring Contracts with Renewals*.

E. R277-114 *Corrective Action and Withdrawal or Reduction of Program Funds* Tab E

Rule R277-114 provides procedures for public education program monitoring and correct action for noncompliance with identified program requirements, accountability standards, and financial propriety. In its March 6, 2015 meeting, the Board approved on second reading continuation of R277-114 consistent with the Utah Administrative Rulemaking Act five-year review requirement, and amendments to the rule. No substantive changes have been made since that time.

It is proposed the Board approve R277-114 *Corrective Action and Withdrawal or Reduction of Program Funds*, as amended, and continuation of the rule, on third and final reading.

F. R277-459 *Teacher Supplies and Materials Appropriation* Tab F

In its March 6, 2015 meeting, the Board approved on second reading continuation of R277-459 consistent with the Utah Administrative Rulemaking Act five-year review requirement, and amendments to the rule. The rule was amended to clarify the funding process followed in the event that the teacher supplies and materials appropriation is not sufficient to provide each teacher the full amount allowed by law. The rule title was also amended. No substantive changes have been made since that time.

It is proposed that the Board approve R277-459 *Teacher Supplies and Materials Appropriation* as amended, and continuation of the rule, on third and final reading.

G. R277-474 *School Instruction and Human Sexuality* Tab G

In its March 6, 2015 meeting, the Board approved on second reading continuation of R277-474 consistent with the Utah Administrative Rulemaking Act five-year review requirement, and amendments to the rule. The rule was updated for language and style. No substantive changes have been made since that time.

It is proposed that the Board approve R277-474 *School Instruction and Human Sexuality*, as amended, and continuation of the rule, on third and final reading.

H. R277-475 *Patriotic, Civic and Character Education* Tab H

In its March 6, 2015 meeting the Board approved on second reading continuation of R277-475 consistent with the Utah Administrative Rulemaking Act five-year review requirement, and amendments to the rule. The rule was amended to clarify who distributes the funds. No substantive changes have been made since that time.

It is proposed that the Board approve R277-475 *Patriotic, Civic and Character Education* on third and final reading.

I. R277-516-3 *Education Employee Required Reports of Arrests and Required Background Check Policies for Non-licensed Employees - Licensed Public Education Employee Personal Reporting of Arrests* Tab I

In its March 6, 2015 meeting the Board approved amendments to R277-516-3 on second reading. The rule was amended to expand the requirements for licensed educator self-reporting and to broaden the list of specified offenses. No substantive changes have been made since that time.

It is proposed that the Board approve R277-516-3 *Education Employee Required Reports of Arrests and Required Background Check Policies for Non-licensed Employees - Licensed Public Education Employee Personal Reporting of Arrests*, as amended, on third and final reading.

J. R277-517-5 *Board and UPPAC Disciplinary Definitions and Actions - Board Disciplinary Actions* Tab J

In its March 6, 2015 meeting the Board approved amendments to R277-517-5 on second reading. The rule was amended to provide updated language for

Board action against an educator for failure to respond to a complaint resulting in a default action, and an educator's failure to appear for a disciplinary hearing. No substantive changes have been made since that time.

It is proposed that the Board approve R277-517-5 *Board and UPPAC Disciplinary Definitions and Actions - Board Disciplinary Actions*, as amended, on third and final reading.

K. R277-700-6 *The Elementary and Secondary School Core Curriculum - High School Requirements* Tab K

In its March 6, 2015 meeting, the Board approved amendments to R277-700-6 on second reading. The rule was amended to modify the Utah high school graduation requirements. No substantive changes have been made since that time.

It is proposed that the Board approve R277-700-6 *The Elementary and Secondary School Core Curriculum - High School Requirements*, as amended, on third and final reading.

L. Requests for Temporary Authorizations Tab L

It is proposed that the Board approve temporary authorizations for licenses as submitted by school districts and charter schools.

M. List of Educator Licenses Processed Tab M

A summary of the total number of educator licenses and license areas processed in March 2015 is provided for Board information. It is proposed that the Board receive the report.

DRAFT

# DRAFT UTAH STATE BOARD OF EDUCATION
# LEGISLATIVE MEETING MINUTES

**January 29, 2015**

A legislative meeting of the Utah State Board of Education was held January 29, 2015 at the Utah State Office of Education, 250 East 500 South, Salt Lake City, Utah. Chair David Crandall conducted. The meeting commenced at 12:05 p.m.

**Board Members Present:**

Chair David L. Crandall
1st Vice Chair David L. Thomas
2nd Vice Chair Jennifer A. Johnson
Member Dixie L. Allen
Member Leslie B. Castle
Member Brittney Cummins
Member Linda B. Hansen
Member Jefferson Moss
Member C. Mark Openshaw
Member Spencer F. Stokes
Member Nancy Tingey (non-voting)
Member Terryl Warner

**Board Members Participating Electronically**

Member Laura Belnap
Member Barbara W. Corry
Member Mark Huntsman
Member Joel Wright

**Board Members Excused:**

Member Freddie Cooper (non-voting)
Member Kristin Elinkowski (non-voting)
Member Marlin K. Jensen (non-voting)
Member Steven R. Moore (non-voting)
Member Teresa L. Theurer (non-voting)

**Executive and Board Staff Present:**

Brad Smith, State Superintendent
Sydnee Dickson, Deputy Supt.
Judy Park, Associate Supt.
Bruce Williams, Associate Supt.
Lorraine Austin, Board Secretary
Emilie Wheeler, Board Communications Specialist
Chris Lacombe, Assistant Attorney General

**Others Present:**

Fawn Morgan, Lori Kimlos and Sharyl Smith - School Library PALS; D'Lynn Poll, Morgan School District; Blake Wight; Adam Olowich; Chris Gadfrey, Utah School Employees Association

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**Opening Business**

Chair David Crandall called the meeting to order at 12:05 p.m. He noted that Members Belnap, Corry, Huntsman, and Wright were participating by phone.

Nancy Tingey, the new Utah School Boards Association member appointed to the Board, was welcomed.

**Discussion with Legislator**

Representative Stephen Handy was welcomed to the meeting. He reviewed his bill, HB 49 *Clean Fuel School Buses and Infrastructure*. He noted that he has worked with Utah State Office of Education (USOE) staff and a transportation task force on this bill to accelerate clean fuel school buses. The bill includes grants to school districts with a match requirement.

Representative Handy acknowledged that the Board has removed pupil transportation from its budget priority list, but requested that the Board work with him to move the bill forward. He requested that USOE staff provide him with information to help educate and support the initiative. Superintendent Smith indicated that USOE staff will work with him to provide information.

**Budget Revisions and Prioritization**

Chair Crandall referenced a talking points sheet distributed to legislative committees and information about the two percent budget reduction exercise called for by the Executive Appropriations Committee of the legislature.

Associate Superintendent Bruce Williams reviewed the documents. It was reported that Board leadership submitted suggestions for the two percent budget reduction as the deadline for submission was prior to a Board meeting.

The Board considered budget reductions for the Minimum School Program.

**MOTION** was made by Vice Chair Thomas and seconded by Member Openshaw that the Board adopt the recommendations as submitted by Board leadership.

Vice Chair Johnson asked for a separate discussion of each item. Superintendent Williams reviewed each line item.

**MOTION TO AMEND** was made by Member Stokes that the following

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adjustments be made to the Minimum School Program budget reduction recommendations: Reinstate funds for Enhancement for At Risk Students ($300,000); reinstate funds for Youth in Custody ($1 million); reinstate funds for K-3 Reading Improvement ($2 million); reinstate funds for Library Books and Electronic Resources ($550,00); reinstate funds for Critical Languages and Dual Immersion ($300,000), and; reinstate funds for Early Intervention ($500,000).

**MOTION** was made by Vice Chair Thomas that the motion be divided. Without objection, the motion was divided.

Motion to amend to reinstate funds for Enhancement to At Risk Students carried, with Member Belnap opposed.

Motion to amend to reinstate funds for Youth in Custody carried, with Member Belnap opposed.

Motion to amend to reinstate funds for K-3 Reading Improvement carried unanimously.

Motion to amend to reinstate funds for Library Books and Electronic Resources carried, with Members Allen, Castle, Corry, Crandall, Hansen, Huntsman, Stokes, Warner and Wright in favor, and Members Belnap, Cummins, Johnson, Moss, Openshaw and Thomas opposed.

Motion to amend to reinstate funds for Critical Languages and Dual Immersion carried, with Member Belnap opposed.

Motion to amend to reinstate funds for Early Intervention carried unanimously.

Motion to amend was made by Member Hansen that Matching Funds for School Nurses ($882,000) be reinstated. Without a second the motion did not move forward.

**MOTION TO AMEND** was made by Member Warner and seconded by Member Hansen that $882,000 be moved from Adult Education to Matching Funds for School Nurses; and that $1 million be moved from Adult Education into Enhancement for Accelerated Students.

**MOTION** was made by Vice Chair Thomas that the motion be divided. Without objection the motion was divided.

Motion to amend to move $882,000 from Adult Education to Matching Funds

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for School Nurses was considered. Member Hansen voiced her strong support for school nurses. Member Castle mentioned that it would be helpful to know how effective the programs are for which the Board is voting.

Motion to amend failed, with Members Hansen and Warner in favor, and Members Allen, Belnap, Castle, Corry , Crandall, Cummins, Johnson, Moss, Openshaw, Stokes, Thomas and Wright opposed; Member Huntsman absent.

Motion to move $1 million from Adult Education to Enhancement for Accelerated Students carried, with Members Castle, Crandall, Hansen, Johnson, Moss, Openshaw, Stokes, Thomas, Warner and Wright in favor, and Members Allen, Belnap, Corry, Cummins and Stokes opposed; Member Huntsman absent.

Member Stokes called the question. Motion carried.

Motion to adopt the two percent adjustment, as amended, carried, with Members Allen, Castle, Corry, Crandall, Cummins, Johnson, Openshaw, Stokes, Thomas, Warner and Wright in favor, and Members Belnap and Hansen opposed; Members Huntsman and Moss absent.

The Board considered reductions to the USOE Budget.

**MOTION** was made by Vice Chair Thomas and seconded by Member Stokes that the Board adopt Board leadership's suggestions on the USOE two percent budget reduction adjustments, and reduce USOE Travel by $40,000, USOE Supplies by $1 million and USOE Equipment by $100,000.

Motion carried; Chair Crandall and Members Huntsman and Moss absent. Without objection the amount travel was reduced was amended to $45,000.

The Board considered proposed reductions to the Utah Schools for the Deaf and the Blind (USDB). USDB Superintendent Joel Coleman explained the recommendation to cut USIMAC because it is non-critical to the fundamental mission of USDB.

**MOTION** was made by Member Stokes and seconded by Member Allen that the Board approve the reduction of USIMAC funding by $483,999.

Motion carried; Chair Crandall and Members Huntsman and Moss absent.

The Board considered proposed reductions to the Utah State Office of Rehabilitation (USOR). USOR Executive Director Russ Thelin reviewed the recommended cuts.

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**MOTION** was made by Vice Chair Thomas and seconded by Member Warner that the Board adopt the two percent cuts to USOR as proposed.

Motion carried; Chair Crandall and Members Huntsman and Moss absent.

**MOTION TO RECONSIDER** was made by Member Warner and seconded by Vice Chair Thomas that the Board reconsider the adjustments to the Minimum School Program.

Motion to reconsider carried.

**MOTION** was made by Member Belnap and seconded by Member Hansen that the Board reinstate MSP funds for Charter School Local Replacement ($11,400,000).

**MOTION TO AMEND** was made by Member Hansen and seconded by Member Belnap that the $11.4 million be taken out of the WPU.

Motion to amend failed, with Members Belnap and Hansen in favor, and Members Allen, Castle, Corry, Cummins, Johnson, Openshaw, Stokes, Thomas, Warner and Wright opposed.

Motion to reinstate the Charter School Local Replacement funds carried; Chair Crandall and Members Huntsman and Moss absent.

**MOTION TO RECONSIDER** was made by Member Castle and seconded by Member Warner that the Board reconsider the MSP budget reduction regarding the Educator Salary Adjustment.

Motion to reconsider failed, with Members Castle, Hansen, and Warner in favor, and Members Allen, Belnap, Corry, Cummins, Johnson, Openshaw, Stokes, Thomas and Wright opposed; Chair Crandall and Members Huntsman and Moss absent.

**State School Fund Two Percent Cap Legislation**

Aaron Garrett from the USOE School Children's Trust Section gave an update on legislation to be sponsored by Representative Rich Cunningham to increase the cap on money that can come out of the permanent State School Fund and go to school community councils. Right now it is capped at two percent of the Minimum School Program. The legislation would raise it to five percent of the MSP.

**ACT Tests**

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Associate Superintendent Judy Park reviewed information distributed about the increased costs of the ACT tests, indicating there will not be sufficient funding for the 2015-16 school year to pay for the tests. The contract with ACT ends in August, and Superintendent Park recommended extending the contract for one year only, asking the legislature for additional funding to cover the costs of the tests, then conducting a study to determine whether SAGE results can be used to replace ACT EXPLORE and PLAN tests.

**MOTION** was made by Vice Chair Thomas and seconded by Member Openshaw that the Board add additional ACT funding of $470,000 as #2 on the one-time priority list.

Motion carried; Chair Crandall and Members Huntsman and Moss absent.

**Adjournment**

**MOTION** was made by Member Allen and seconded by Vice Chair Thomas that the meeting adjourn.

Motion carried. The meeting adjourned at 2:15.

Lorraine Austin, Board Secretary

Minutes pending approval

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# UTAH STATE BOARD OF EDUCATION
# LEGISLATIVE MEETING MINUTES

**February 12, 2015**

A legislative meeting of the Utah State Board of Education was held February 12, 2015 at the Utah State Office of Education, 250 East 500 South, Salt Lake City, Utah. At the request of the Chair, Vice Chair David Thomas conducted the meeting. The meeting commenced at 12:00 p.m.

**Board Members Present:**

Chair David L. Crandall
1st Vice Chair David L. Thomas
2nd Vice Chair Jennifer A. Johnson
Member Dixie L. Allen
Member Laura Belnap
Member Leslie B. Castle
Member Barbara W. Corry
Member Kristin Elinkowski (non-voting)
Member Linda B. Hansen
Member Mark Huntsman
Member C. Mark Openshaw
Member Teresa L. Theurer (non-voting)
Member Nancy Tingey (non-voting)
Member Terryl Warner

**Board Members Excused:**

Member Freddie Cooper (non-voting)
Member Brittney Cummins
Member Marlin K. Jensen (non-voting)
Member Steven R. Moore (non-voting)
Member Jefferson Moss
Member Spencer F. Stokes
Member Joel Wright

**Executive and Board Staff Present:**

Brad Smith, State Superintendent
Sydnee Dickson, Deputy Supt.
Bruce Williams, Associate Supt.
Lorraine Austin, Board Secretary
Emilie Wheeler, Board Communications Specialist
Debbie Davis, USBE Internal Auditor

**Others Present:**

Dawn Davies, Utah PTA, Royce Van Tassel; Thalea Longhurst, Natalie Grange, Jaimie Barrett, Roxana Orellana - USOE; Jennifer Roth, USOR; Representative Greg Daw; Sarah Jones, Utah Education Association; Morgan Jacobsen, *Deseret News*; Ben Wood, *Salt Lake Tribune*; Karen Peterson, Governor's Office.

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**Opening Business**

Vice Chair David Thomas called the meeting to order at 12:00 p.m.

**Internal Audit Director Appointment**

**MOTION** was made by Vice Chair Johnson and seconded by Member Openshaw that the Board appoint Debbie Davis as the Board Internal Audit Director.

Motion carried unanimously.

**Utah State Office of Rehabilitation (USOR) Update**

USOR Executive Director Russ Thelin reported that USOR's budget was submitted to the Social Services Appropriations Subcommittee today. The Subcommittee chairs have indicated that USOR's $6.3 million supplemental request is their number one priority on the one-time funding list. The other USOR requests are in the middle of subcommittee priority list. Vice Chair Johnson explained that the Subcommittee felt pushed to approved USOR's supplemental request as its top priority because of the current financial situation of USOR.

Mr. Thelin distributed and reviewed copies of the motions passed by the Subcommittee regarding USOR, including a call for and audit by the Legislative Auditor General.

Jennifer Roth, USOR Budget Compliance Specialist, reviewed a sheet outlining USOR's structural imbalance and three possible scenarios if the supplemental is fully funded, partially funded, or not funded at all. She reported that it is not the goal of USOR to meet Maintenance of Effort (MOE) this year.

Mr. Thelin reported that there is early indication that federal reallotment money will be available. The fiscal representative from the federal Rehabilitation Services Administration will be in Utah on March 11, and Mr. Thelin will meet with him to discuss a possible waiver of MOE requirements.

Representative Brad Daw from the Social Services Appropriations Subcommittee was welcomed to the meeting. He expressed that as he has talked with his colleagues and they feel there is every intent for USOR to rectify what went wrong, and they recognize that the services performed by the agency are valuable.

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Vice Chair Thomas reported a concern of the Board over the federal reallocation dollars. Those funds are one-time funds that contributed to the structural imbalance because it allowed USOR to add new clients on one-time money. There is also the question of whether accepting reallotment funds will negatively impact the MOE. Ms. Roth explained that using the partial funding scenario, USOR will be asking for fewer dollars so it should not impact MOE. The intention is to wean the agency off the reallotment funds over a two-year period.

Mr. Thelin thanked the Board for its recent rule requiring Board approval for seeking reallotment funds. He expressed that there were the best of intentions in the past for the use of those funds, but without the necessary foresight.

**Discussion with Legislators**

Representative Brad Daw

Representative Daw reported on HB 282 *Online Education Program Amendments* which will expand the statewide online education program to include Utah institutions of higher learning, allowing them to offer rigorous and useful computer science and STEM courses to high school students. He expressed the real need for computer science classes to be taught in schools and spoke of the dearth of computer science teachers. He asked for Board support of the bill. He clarified that the credit will be high school credit and it will be up to the higher education institution to determine whether to accept it as concurrent enrollment credit. Providers will go through the USOE and course sign up will go through the school counselors.

Representative Daw also spoke with the Board regarding constituent concerns about the proposed science standards. He has elected not to run a bill regarding the standards, but offered to bring a compromise to the Board. He asked that when the science standards are reviewed, three points be made very clear up front: 1) It's not about consensus, it's about proving results; 2) science is never settled, and; 3) it's always okay to ask questions. He asked that those three points with some explanatory text be included as part of the standards.

Senator Aaron Osmond

Senator Osmond was welcomed to the meeting. He reported that SB97 1st substitute

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*Property Tax Equalization Amendments* passed out of the Revenue and Tax Committee. He reviewed the changes in the bill. The goal is to address property tax inequity through new revenue.

**MOTION** was made by Member Allen and seconded by Member Warner that the Board support SB 97 1st Substitute.

Motion carried unanimously.

Senator Osmond reported that he is working on a response to the issue of parental rights, and he acknowledged that it has been very difficult. He will fight for the right for parents to make decisions on how their children are educated. The challenge is that there are conflicting sets of statutory requirements. There are requirements that the Board assess and evaluate through statewide assessments, but there has been incredible backlash to computer adaptive testing. He indicated he is receiving hundreds of emails on this topic and recounted some negative experiences from parents and students that are opting out of tests. He is trying to balance parental rights with the need to assess students, and is working on legislation to address the issues that will be more specific and directive. He asked the Board for input. He informed the Board that the intent of last year's legislation was that parents could opt out of any exam, both formative and summative.

Vice Chair Thomas reported that the Board discussed the situation at its last regular Board meeting. Superintendent Smith was directed to work with his senior staff to bring back some language for a policy or rule for the Board to discuss and act upon. He asked on behalf of the Board that Senator Osmond allow the Board to take action prior to him running legislation.

Chair Crandall acknowledged that a memo that was sent from the State Office of Education to local education agencies regarding testing opt out was poorly worded and contained a policy which the Board had not approved. He thanked Senator Osmond for his willingness in the past to allow the Board to address constituent concerns and echoed the hope that the Senator would allow the Board the latitude to address the issue without further legislation.

Board members expressed that computer adaptive testing is a powerful tool to inform teachers regarding their instruction. They also voiced concerns that the required statewide

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assessments are being used to grade schools and evaluate teachers.

Senator Osmond asked the Board to have the discussion regarding the policy as quickly as possible as he is compelled to put together legislation, but is willing to consider a Board solution.

**USOR Order of Selection**

Executive Director Thelin explained that Order of Selection regarding service to clients is present in all three of the funding scenarios presented earlier. The longer they are on Order of Selection, the greater the impact to clients. He estimated the impact the first year would be 15 percent, and the number of clients would continue to rise if it goes into a second and third year. Order of Selection will be used as a tool to realign USOR so eventually it will be able to serve all clients.

**Public Education Appropriations Report**

Associate Superintendent Bruce Williams referenced the following documents that were distributed: Public Education 2% Budget Reduction Exercise; Public Education: Committee Chair Recommendations—Ongoing; Public Education: Committee Chair Recommendations—One-Time; Public Education Appropriations Subcommittee Budget Motions; and Public Education Appropriations Subcommittee Recommendations on Budget Priorities.

Superintendent Williams reviewed today's recommendations from the Education Appropriations Subcommittee regarding the Minimum School Program and restoration of the two percent cuts. The recommendation was to restore all of the programs they were proposing to cut. The Committee is also recommending that money for districts to provide 50 percent of the charter school local replacement funding, estimated to be $20,555,400, be placed into flexible reallocation to be distributed under the same method which exists now.

Superintendent Williams reported that Representative Last is sponsoring a bill that would require all districts to contribute the full 25 percent instead of up to 25 percent and he indicated the bill may be incorporated into the funding bill. He reviewed two sets of motions from the Subcommittee regarding charter school local replacement.

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Superintendent Williams reviewed those items that are not on the list that are in specific bills, such as the Technology Initiative and Graduation/Counselors Initiative.

**Executive Session**

**MOTION** was made by Vice Chair Johnson and seconded by Member Allen that the Board move into Executive Session for the purpose of the discussing the character, professional competence, or physical or mental health of individuals.

Upon voice vote of those present, the Board moved into Executive Session at 2:05 p.m. Members present in Executive Session included Board members Allen, Belnap, Castle, Corry, Crandall, Elinkowski, Hansen, Huntsman, Johnson, Openshaw, Theurer, Thomas, Tingey and Warner; and Brad Smith, Sydney Dickson, Lorraine Austin and Emilie Wheeler.

**MOTION** was made by Member Allen and seconded by Vice Chair Johnson that the Board come out of Executive Session.

Motion carried. The Board reconvened in open meeting at 2:16 p.m.

**Adjournment**

**MOTION** was made by Vice Chair Johnson and seconded by Member Allen that the meeting adjourn.

Motion carried. The meeting adjourned at 2:16 p.m.

Lorraine Austin, Board Secretary

Minutes Pending Approval

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# DRAFT UTAH STATE BOARD OF EDUCATION
# LEGISLATIVE MEETING MINUTES

**February 19, 2015**

The Utah State Board of Education met in a legislative meeting on February 19, 2015 at the Utah State Office of Education, 250 East 500 South, Salt Lake City, Utah. Chair David Crandall conducted. The meeting commenced at 12:05 p.m.

**Board Members Present:**

Chair David L. Crandall
2nd Vice Chair Jennifer A. Johnson
Member Dixie L. Allen
Member Laura Belnap
Member Freddie Cooper (non-voting)
Member Barbara W. Corry
Member Kristin Elinkowski (non-voting)
Member Linda B. Hansen
Member Mark Huntsman
Member Jefferson Moss
Member C. Mark Openshaw
Member Nancy Tingey (non-voting)
Member Terryl Warner

**Board Participating Electronically:**

Member Leslie Castle

**Board Members Excused:**

Vice Chair David Thomas
Member Brittney Cummins
Member Marlin K. Jensen (non-voting)
Member Steven R. Moore (non-voting)
Member Spencer F. Stokes
Member Teresa L. Theurer (non-voting)
Member Joel Wright

**Executive and Board Staff Present:**

Brad Smith, State Superintendent
Sydnee Dickson, Deputy Supt.
Bruce Williams, Associate Supt.
Lorraine Austin, Board Secretary
Emilie Wheeler, Board Communications Specialist
Debbie Davis, USBE Internal Auditor

**Others Present:**

Jan Ferré, LCPD

**Opening Business**

Chair David Crandall called the meeting to order at 12:05 P.M.

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**Indirect Cost Pool**

Vice Chair Johnson reported that the issue was raised in the Public Education Appropriations and Social Services Appropriations Committees about the USOE/USOR indirect cost pool. The Legislative Fiscal Analyst for the Social Services Committee wrote a brief on the issue, and the committee chairs are suggesting that USOE transfer $450,000 to USOR as a rebate for overcharging for indirect costs. Vice Chair Johnson reported that the Board's Audit Committee will be discussing the issue in its meeting tonight.

**Appropriations Report**

Associate Superintendent Williams distributed and reviewed information about the General Fund and Education Fund available revenue.

**Legislation**

S.B. 37 *Data Reporting Regarding Front-line Teachers*

Chair Crandall reported that he has talked with Senator Aaron Osmond about S.B. 37. Senator Osmond indicated that if the Board would be willing to take up the issue independent of legislation he would be willing to abandon the bill. Member Openshaw recommended that as a matter of basic policy the Board should do what they can to prevent legislation.

Deputy Superintendent Sydnee Dickson reported that when money is appropriated to local education agencies (LEAs) for things such as teacher supplies the legislature wants to make sure who is being counted, as not all individuals that work in the classroom may be teachers. She felt it would be something that could be discussed in the legislative interim meetings and information provided on what the USOE database holds and how teacher data is collected and reported. Chair Crandall noted that there are also pieces in the legislation, such as reporting, that the Board will need to address.

Superintendent Smith reiterated the importance of having a single framework to make sure there are consistent accounting number for teachers. He expressed that it is something the office can and should do.

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H.B. 264 *Competency Licensing for Educators*

It was reported that H.B. 264, sponsored by Representative David Lifferth, provides that if a particular vendor offers at least 5,000 teacher licenses nationwide and is accepted in ten states, the Board would be obligated to accept those licenses. Superintendent Smith suggested that it would be more efficacious and appropriate to have that handled by the USOE. He thoroughly supports the notion of competency based licensure, but it seems strange to him that the entity referenced was created by the federal Department of Education to provide teacher licensure.

Graduation Requirements Bills

Deputy Superindent Dickson reported that the Senator Ann Millner's bill, S.B. 196 *Math Competency Initiative*, is geared toward students achieving quantitative math competency by the time they get to college and encourages diminishing rates of remediation. She expressed concern that the bill puts students into three tracks–college bound, career and technical education, and students with disabilities. Students planning to attend college would have to take and pass college courses in high school, or Advanced Placement, International Baccalaureate, etc.

Dr. Dickson also drew attention to bills that would add a Civics test and a language requirement to graduation requirements.

Member Allen hoped that those running the bills would take into consideration the challenges for rural schools in providing additional courses.

Board members and staff expressed concern over the legislature setting graduation requirements. Vice Chair Johnson suggested inviting the bill sponsors to discuss the governance issues.

Chair Crandall stated that the underlying issue with all these bills is the idea of a graduated diploma, and the idea that a student can graduate from high school and still not be ready for college. An approach could be that in addition to offering diplomas, certificates with additional requirements could be offered. He also suggested talking to the sponsors about taking a different approach. It might be a good discussion for a joint meeting.

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Superintendent Smith commented that the Board and USOE have committed to doing a zero-based budgeting process in which legislators will be invited to participate. Part of that is inherently involved with strategic planning. He suggested changing the timing of discussions with legislators, bringing legislators to the table earlier in the year, in June rather than January.

**Charter School Funding**

Member Corry reported that she has talked with several school district superintendents and they are very concerned about the change to charter school funding. She asked whether there has been any movement about adding funding back into the charter school replacement item.

Chair Crandall responded that it is currently in the hands of the Executive Appropriations Committee. He reminded Board members that the Board recommended a change to the way charter schools are funded. Member Corry asked that the Board discuss changing its recommendation, and indicated she had not realized the impact of that decision. She felt that after years of charters and districts working together to come up with funding, the recommendation shouldn't have been made without discussion with districts and charters. She also noted that the recommendations from the Board's R277-419 Task Force haven't been considered, and suggested that the issue needs to be revisited to allow for more study.

Vice Chair Johnson clarified that if the 50 percent funding is approved, there will be money set aside to hold districts harmless that have many charter schools in their areas. There are some districts that will be advantaged by the situation. The question is whether charters should be funded on a statewide basis or funded based on from where the students are coming. The recommendation has already moved forward. It is complex because of the way the funding has been structured to go both into the flexible allocation fund and one-time fund to hold districts harmless.

Chair Crandall reported that during the discussion about this issue in Executive Appropriations, it was recommended by some committee members that since this issue is such a big issue it be handled through legislation rather than the budget bill.

Member Allen expressed the importance of reminding the legislature that charter

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schools have more flexibility, fewer students and more ability to change the education process than do traditional schools. Some districts have many charters with them, not because districts can fund them, but because charters are held harmless. She believes charters are wonderful, but the burden shouldn't be placed back on the districts.

Member Tingey pointed out that the hold harmless provision is only for one year, while the funding constraints will extend into the future for districts heavily hit.

Member Moss stated that he shares the concerns and believes there would be benefit in relaying to the legislature that the Board has some concerns, and after further discussion, realized it is a very complex issue that was determined fairly quickly. His recommendation would be to slow the decision down and have more discussion because of the impacts to districts.

Member Huntsman asked if the proposed $6.5 million is sufficient to hold districts harmless. A response was given that it is debatable.

Member Belnap emphasized that it comes down to our children. When districts and charters are not getting along it hurts the children because schools are not sharing resources or working together because of the chasm created. She expressed that she would love to see charters funded through the state at the same funding level as districts. She felt no money should be transferred to charters from traditional schools, but doesn't want charters hurt either.

**MOTION** was made by Member Belnap and seconded by Member Corry that the Board direct Board leadership to meet with the Executive Appropriations Committee leadership and/or the Executive Appropriations Committee to discuss the charter school funding issue and express the Board's concern that because the process is very complicated, and after further review, the Board requests pulling back from changing the charter school funding process to allow for a more lengthy debate.

Member Belnap also suggested discussing the bigger issue of having charters funded at the same level as traditional schools, but not taking from each other to do that.

Superintendent Smith reported that the transfer has always been bothersome to local school boards because they are the ones that have to pass the tax, and a piece of that is

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diverted to an entity over whom the school districts have no electoral control. As a school board member, he felt he was being asked to almost violate his oath of office and raise taxes, but divert money elsewhere. There is need for a discussion with the legislature about the funding mechanism for charters.

Member Elinkowski asked if the Board's support is also tied to abolishing the October 1 funding. A portion from the Board's February 5, 2015 meeting minutes were read, confirming that the Board approved adding charter school replacement funding to the flexible allocation fund and recommending the sunset of the exemption of ADM plus growth for charter schools.

Member Castle questioned whether the Board has a better solution to fund charters and asked how others states are funding charters. Superintendent Smith indicated if the funding structure is reconsidered he would direct staff to understand how other states have addressed the issue and look at other approaches.

Member Hansen added that the State Charter School Board discussed the issue in its last meeting, and after listening to the charter board and local superintendents she feels it would be better to have separate funding streams.

Member Openshaw noted that this is a policy discussion that is set by the legislature and felt it important to recognize and thank the legislature for asking the Board for advice.

Motion carried unanimously.

**Testing Opt Out**

Member Moss asked for an update on changes to the memo that was sent from the USOE to LEAs on opting out of testing. Superintendent Smith reported that he has outlined a new memo to be presented to the Board in its March meeting. The memo will include the following: 1) A strong recognition of parental rights; 2) a statement that assessment is a strong part of education and the case needs to be strongly made that appropriate assessment is key to education reform; 3) a statement that there is the safe harbor provision that provides certain safe harbor opt outs. The safe harbor provisions aren't for all tests, and there are things for which the safe harbor provision doesn't allow opt out.

Member Moss raised the concern that a statement has been made to districts that

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suggests there are some tests from which students may not opt out. He has further concerns that parents are still being told things that are exacerbating the problem.

Superintendent Smith responded that districts and LEAs have not asked for guidance, and he is waiting to give guidance until the Board has approved a policy. There was ambiguity related to the DIBELS and SAGE interim assessments. As the DIBELS and SAGE interim windows have closed, he didn't feel the need to immediately send another memo to LEAs without Board approval.

Member Belnap reported that a concern that has been related to her from districts and charters is that educators have been told they can't tell students they can opt out of a test. Superintendent Smith responded that the Board has approved teacher rules of ethics that indicate educators will support the assessment system approved by the state. There is a problem moving forward that as the evaluation system hooks in teacher performance, that may cause an ethical problem.

Member Castle related a conversation she had with a rural superintendent who indicated he would appreciate some direction from the Board so districts are handling the opt out issue in a consistent way. He expressed his feeling that opting out of testing really undermines the integrity of the school and education system in the state. She supported that statement, and referenced a suggestion she made previously that parents do have the right to opt their children out of testing, but there should be consequences for doing so. If students are not tested, she thinks because of such a threat to the whole system, it should be clear that those students have not been evaluated and vetted as other students have been.

Member Moss asked if SAGE test are being given for every grade. USOE Assessment Director JoEllen Shaeffer responded that Board rule requires SAGE writing assessment in grades 3-11. Member Moss asked for information on the writing assessments and the context in which testing that many grades came about.

Superintendent Smith suggested there may need to be a look at assessment strategy. It is deeply concerning to him that there is a percentage of students opting out, because that compromises the system and outcomes for those students. Information may need to be rolled out in a different way.

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Vice Chair Johnson also expressed concern about the addition of SAGE writing assessments and asked for a copy of the most recent contract with AIR. Dr. Dickson reported that the Board signed off on the contract and it contains language pertinent to what teachers should say. The contract will be provided to the Board.

**Adjournment**

**MOTION** was made by Vice Chair Johnson and seconded by Member Openshaw that the meeting adjourn.

Motion carried. The meeting adjourned at 1:45 p.m.

Lorraine Austin, Board Secretary

Minutes Pending Approval

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# DRAFT UTAH STATE BOARD OF EDUCATION
# LEGISLATIVE MEETING MINUTES

**February 26, 2015**

A legislative meeting of the Utah State Board of Education was held February 26, 2015 at the Utah State Office of Education, 250 East 500 South, Salt Lake City, Utah. Chair David Crandall conducted. The meeting commenced at 12:02 p.m.

**Board Members Present:**

Chair David L. Crandall
2nd Vice Chair Jennifer A. Johnson
Member Dixie L. Allen
Member Leslie B. Castle
Member Barbara W. Corry
Member Kristin Elinkowski (non-voting)
Member Linda B. Hansen
Member Mark Huntsman
Member Jefferson Moss
Member C. Mark Openshaw
Member Spencer F. Stokes
Member Nancy Tingey (non-voting)
Member Terryl Warner
Member Joel Wright

**Board Members Excused:**

1st Vice Chair David L. Thomas
Member Laura Belnap
Member Freddie Cooper (non-voting)
Member Brittney Cummins
Member Marlin K. Jensen (non-voting)
Member Steven R. Moore (non-voting)
Member Teresa L. Theurer (non-voting)

**Executive and Board Staff Present:**

Brad Smith, State Superintendent
Sydnee Dickson, Deputy Supt.
Judy Park, Associate Supt.
Bruce Williams, Associate Supt.
Russ Thelin, USOR Executive Director
Lorraine Austin, Board Secretary
Emilie Wheeler, Board Communications Specialist
Debbie Davis, USBE Internal Auditor

**Others Present:**

Jan Ferré, LCPD; DeAnnTilton; Rebecca Ivory; Sara Jones, Jay Blain, Tracey M. Watson - Utah Education Association; Marcus Stevenson; Stuart Call; Keith Lawrence, USOE; Adam Kolowich; Morgan Jacobsen, *Deseret News*; Ben Wood, *Salt Lake Tribune*; Liz Zentner, Utah PTA

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**Opening Business**

Chair David Crandall called the meeting to order at 12:02 p.m.

**SAGE Assessment System**

Superintendent Brad Smith discussed a House Joint Resolution that calls on the Board to study excessive or redundant testing. Superintendent Smith stated that he doesn't feel it's reasonable or acceptable to consider abandonment of the system and there is a need to articulate the importance of a reasonable assessment system. He reported that he has begun to engage with Senators Osmond and Stephenson on the issues and has committed to them that the Board will study testing as part of its strategic plan and budgeting process.

Vice Chair Thomas reiterated that he has also talked with Senator Osmond and the Senator has expressed his willingness to engage with the Board.

**Discussion with Legislator**

Senator Ann Millner was welcomed to the meeting. She reviewed S.B. 196 *Math Competency Initiative*, a bill she is sponsoring that focuses on math competencies and proficiencies. The bill outlines three approaches to math competency and the high school environment through pathways. Each pathway would provide different options and would allow students to take challenge exams. The intent is not a different diploma, but some documentation showing that a student reached a certain competency level.

Member Castle questioned the idea of pathways and expressed her concern that only students who have parents that are advocates will be directed to the higher performing pathways, and it may be a disadvantage for students who don't have a strong advocate.

Member Warner asked if there has been a consideration of the teacher shortages in math. Senator Millner responded that more professional development is needed and she is cosponsoring a professional development bill. She expressed that she is trying to bridge the gap between higher and public education and welcomes further conversation.

Member Cooper asked whether there is anything in the bill that addresses assistance to parents who may not have the knowledge to push their children into higher achieving

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pathways. Senator Millner responded that the framework needs to be put in place first.

Vice Chair Johnson expressed concerns about the expected competencies in the bill for those that are college-bound and indicated that a large contingency of students now would not meet that requirement. There is also a bill that would require four years of math, and there are a lack of resources to achieve that goal on the part of the system. She asked whether the Senator would consider looking at proficiency on SAGE scores in Math III as an addition to the bill, and whether needed resources will be addressed. Senator Millner indicated she is willing to consider changes.

Deputy Superintendent Dickson thanked Senator Millner for engaging with the Board. She asked for clarification on the implementation timeline, which would start with the junior class of the 2016-17 school year. Something this substantial is usually backmapped to a freshman class so they would have four years to map the courses. Senator Millner responded that with the options such as Advanced Placement, International Baccalaureate, and Math I, II, and III it seems there are elements already in place to implement the requirements faster.

**R277-404 *Requirements for Assessment of Student Achievement***

Superintendent Smith Brad distributed a pre-draft of Board rule R277-404 for Board member review. The rule will be discussed in the upcoming March 5-6 Board meeting.

Vice Chair Thomas asked if Senator Osmond has reviewed the draft and if it addresses his concerns. Superintendent Smith responded that the Senator has seen a preliminary version and since that time Superintendent Smith edited the draft to strengthen the parental rights portion. Senator Osmond has given an indication that if the Board adopts the rule, he will remove the portion on parental rights from his bill.

**Appropriations Committee Update**

Chair Crandall reported that he and Vice Chair Johnson met with the chairs of the Appropriations Committee last Friday. They were unable to discuss with them the charter schools local replacement issue because of the attention given to concerns regarding the Utah State Office of Rehabilitation (USOR). He did talk with Speaker Greg Hughes and Senate

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President Wayne Niederhauser individually about the Board's desires regarding local replacement. They echoed the Executive Appropriations Committee feeling that since the local replacement change is a policy change, they would rather have it addressed in legislation.

Vice Chair Johnson reported on the conversation regarding USOR. She indicated the Appropriations Committee chairs are very upset, as they have been told for the third time that if they give more money to USOR the problems will be fixed. She did her best to assert that changes are being made. Chair Crandall also reported that there is no trust in the numbers being reported for the shortfall. The Appropriations Committee and Social Services Appropriations Subcommittee chairs are gravely concerned and there is not certainty that USOR's requested supplemental will be funded.

Vice Chair Johnson reported that the Audit Committee will be discussing USOR issues further and will provide the Board an update in its next meeting.

**Budget Priorities**

Chair Crandall reported that Senator Hillyard has asked the Board to prioritize its request for the $30 million backfill if Utah does not receive an Elementary and Secondary Education Act waiver and if the money were to come from the Education Fund. Vice Chair Thomas reminded the Board that they already prioritized the $30 million as one-time priority #3. He would be more comfortable with one-time monies being used for the backfill, as last year all the one-time monies went to higher education.

**Legislation**

Board leadership explained that there are bills that are tied to the Board's legislative funding priorities, and though the Board may not have taken a position on those specific bills, they have represented those Board priorities to legislators. If the Board does not have a position or priority, Board leadership is not stating a Board position.

There are two specific bills that are tied to the Board and that staff have helped to craft—Senator Last's professional learning grant bill and Senator Stephenson's digital technology bill.

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Superintendent Smith reported that when he is asked to make comment at the legislature, he prefaces those comments with the statement that the Board has not taken a position on the bill. In the case of Senator Stephenson's digital technology bill, he knew the Board had taken a position in favor with the caveat that certain portions related to Board control were changed. He has endeavored as positively as he can to help legislators craft bills, or commit to having the Board address issues in rulemaking. As a result, the Board will see several items coming forward for rulemaking that are reflective of the process to engage with legislators and relieve pressures they are receiving from constituents.

HB 345 1st Substitute *Abuse Policy*

Superintendent Smith distributed and reviewed HB 345 S1 *Abuse Policy for Educators*. The bill primarily provides some amendments to the governance structure of the Utah Professional Practices Advisory Commission (UPPAC) as it relates to rulemaking, and also includes provisions that provide that for certain sorts of conduct an educator is barred from reentry into the profession for life.

Member Stokes expressed concern over the amount of time spent on UPPAC cases in Board meetings and that a requirement that the Board hear every case would be too cumbersome. He supported the Board having rulemaking authority and setting some guidelines. He expressed concern over wording in Line 177 and throughout the bill of "immoral, unprofessional or incompetent behavior," and feels that the specificity removes the rulemaking authority of the Board.

Member Castle questioned the practice of UPPAC following the criminal outcomes in making its decisions, although that is not required. She expressed concern over educators making plea arrangements in cases so they not will lose their licenses.

Member Warner stated that she feels the Board and UPPAC have improved in the handling of cases, and likes the way the Board is headed. She is in support of rulemaking for UPPAC being with the Board. She also suggested that the bill include educators on the sex offender registry.

Vice Chair Thomas voiced that he is supportive of the Board having rulemaking

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authority to the extent possible. He is opposed to legislation that ties the Board's hands and makes the decisions for the Board. He felt a lifetime ban outlined in law ties the hands of the Board. There are many situations that could come up for which the Board should have discretion.

**MOTION** was made by Member Stokes and seconded by Member Moss that the Board support HB 345 1st Substitute and authorize the Superintendent and Board leadership to work with the sponsor to incorporate the changes suggested by Board members.

Member Allen questioned whether peer oversight on UPPAC is provided for. Superintendent Smith reported that the bill does not address membership and is not intended to eliminate teachers from UPPAC. It may be appropriate to broaden the size of UPPAC.

Vice Chair Johnson requested that Rebecca Ivory give a summary of the background on the bill. Mrs. Ivory was invited to address the Board. She noted that her husband is Representative Dan Ivory, and indicated that he had started on the bill before she got involved. She recounted her experience of being sexually abused by a teacher for many years and of the effect it has had on her life. She noted that the procedures in place now haven't allowed the Board to see the victims. She indicated the legislation gives the Board the choice to revoke an educator license or to not reinstate if there has been felony sexual misconduct.

Member Wright thanked Mrs. Ivory for her courage in speaking out.

Motion carried unanimously.

HB 263 *State School Board Powers Modifications*

Vice Chair Thomas reported that this bill, sponsored by Representative Norman Thurston, attempts to modify what "general control and supervision" means in the Constitution in regards to the Board and is directly contrary to the USBA v. USBE case from 2001 and the ruling of the Utah Supreme Court. This is an attempt to say the Board's powers originate in the legislature instead of state statute. It passed out of the House committee 12-0.

**MOTION** was made by Vice Chair Thomas and seconded by Member Allen that the Board oppose HB 263.

Vice Chair Johnson voiced that she would prefer the Board hearing from the sponsor

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before opposing. She doesn't see that this changes the Board's authority in any large sense. Chair Crandall acknowledged that there is probably not time for the Board to meet with Representative Thurston.

**MOTION TO AMEND** was made by Member Stokes and seconded by Member Allen that the Board direct Board leadership to have a conversation with Representative Thurston to determine the reason for the bill and seek changes that are consistent with the Board's constitutional powers, and that the Board oppose the bill if no changes are made.

Motion to amend carried.

Motion as amended carried unanimously.

Other Legislation

Deputy Superintendent Dickson alerted the Board that there are several bills about graduation requirements and licensure that are gaining some traction. If the graduation requirements bills pass, math requirements would increase and a language requirement and civics test would be added.

Members Hansen and Warner questioned why the Board is not taking more positions on bills and expressed discomfort about Board members and staff testifying before legislative committees when the Board has not taken a positions.

Vice Chair Johnson expressed that the Board as a body doesn't have the authority to tell each other how to act. She would prefer that rather than taking positions the Board partner with legislators in the formation of concepts. She has heard from numerous sources that are positive about the way the Board is working with the legislature. She reiterated that Board leadership is working hard to move the concepts for which the Board is supportive.

Member Stokes commented that the process is so fluid and moves so rapidly that he doesn't support the Board taking positions on bills. In years past, the image of the Board was that the Board took positions without talking to legislators and were negative about legislators. He supports the process of asking legislators to bring issues early to the Board to allow the Board to support legislators where possible. He would like it to get to the point where

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legislators would not file an education bill without talking first to the Board.

**Adjournment**

**MOTION** was made by Vice Chair Johnson and seconded by Member Warner that the meeting adjourn.

Motion carried. The meeting adjourned at 2:05 p.m.

Lorraine Austin, Board Secretary

Minutes pending approval

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# UTAH STATE BOARD OF EDUCATION
# MEETING MINUTES

March 5-6, 2015

## BOARD STUDY SESSION, MARCH 5, 2015

A Study Session of the Utah State Board of Education was held March 5, 2015 at the Utah State Office of Education, 250 East 500 South, Salt Lake City, Utah. At the direction of the Chair, Second Vice Chair Jennifer Johnson conducted.

Those attending included Board Members Dixie Allen, Leslie Castle, Brittney Cummins, Barbara Corry, Linda Hansen, Mark Huntsman, Jennifer Johnson, Jefferson Moss, Mark Openshaw, Teresa Theurer, Nancy Tingey and Terryl Warner. Board and State Office of Education staff attending included Sydnee Dickson, Bruce Williams, Judy Park, Lorraine Austin, Emilie Wheeler, Chris Lacombe, Nicole Call, Sarah Young, Ricky Scott, Travis Rawlings and Robert Austin. Others attending included Jay Blain, UEA; Bonilynn Henrie and Sharon Zenger, USDBEA; Joylin Lincoln; Nathan Andelin, Relational Data Corp.; and Tina Smith, UAPCS.

Vice Chair Johnson called the meeting to order at 4:03 p.m.

### Standards Revision Process and Timeline

Deputy Superintendent Sydnee Dickson gave a presentation on standards setting and the standards review process.

Member Moss asked for a comparison with how other states revise standards. He also indicated it would be helpful for staff to report why standards are being adopted, how it will be done, and why it is an improvement.

Member Cummins questioned whether too much pedagogy is include in the standards and asked if there could be separation between pedagogy, teaching methods, and standards. USOE Teaching and Learning Director Diana Suddreth clarified that pedagogy and teaching methods are not included in the standards. Deputy Superintendent Dickson informed the Board there has been some confusion because what has been presented to the Board in the past were standards plus material for teacher assistance. In the future just the standards and

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objectives will come to the Board.

Dr. Dickson requested input from the Board on what they would like to receive as far as standards and what should be posted to the public. She clarified that teacher resources are developed to ensure the standards are actualized in the classroom.

Member Hansen commented that it has been extremely helpful for her as a parent to have access to the standards. Vice Chair Johnson reported that she has talked to some parents that feel overwhelmed by the standards because they are highly detailed and not easy to consume.

Deputy Superintendent Dickson reviewed the Board-approved revision schedule and asked for input. It was noted that there is a matrix on the Board website with the timeline.

Member Moss asked if the standards review committee looks at the current standards or looks at proposed changes to standards, and what happens with the feedback they give.

Member Allen expressed that she has found with the 90-day public review there has been a communication gap between staff, the districts, and the public receiving notification.

Member Moss asked how feedback is received from the public and how that feedback is incorporated into the standards. He asked if the Board receives public feedback before it is incorporated into the standards. Dr. Suddreth indicated that feedback is incorporated prior to standards coming to the Board unless there is a broad or controversial concept; then Board input will be sought. She felt it would be helpful for the Board to give input along the way. Member Moss requested that the Board be engaged all through the process. Dr. Dickson indicated the Board will be engaged early on in the process to give direction.

Member Cummins suggested an addition to the process, that an item come to the Board prior to the beginning of a standards revision process to inform the Board about why revisions are needed. The Board would then give approval for the revision process to start. After approval is given, the standards review committee would meet and a report would come back to the Board with the standards review committee feedback.

Member Castle asked for more focus on diversity in the standards review committee membership.

Member Hansen suggested that before a standards review committee is convened, staff

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come to the Board with a recommendation to convene the committee.

Mark Huntsman suggested that a flow chart be developed that would allow Board members to track where the specific standards being revised are in the process and pinpointing when the Board is expected to make decisions. Dr. Dickson indicated she will have staff design a specific time frame once the Board gives the green light to start the revisions process.

Member Cummins suggested adding into the timeline set by the Board a review of the standards review committee and adding interim times for the Board to check in on the process. This would allow the Board to handle public concerns in a more timely manner. Dr. Dickson will revise the timeline accordingly. It will be up to the Board to decide whether reports go to the full Board or a committee.

Vice Chair Johnson recommended that as the membership of several of the upcoming standards review committees has already been determined, those committees be invited to come to Board meeting when the standards review request initially comes to the Board.

**MOTION** was made by Member Castle and seconded by Member Huntsman that the meeting adjourn.

Motion carried. The meeting adjourned at 5:53 p.m.

**Board Committee Meetings**

The Board's Finance Committee, Law and Licensing Committee, and Standards and Assessment Committees met following the Study Session.

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**UTAH STATE BOARD OF EDUCATION MEETING, MARCH 6, 2015**

A regular meeting of the Utah State Board of Education was held March 6, 2015 at the Utah State Office of Education, 250 East 500 South, Salt Lake City, Utah. Chair David Crandall conducted. The meeting commenced at 8:00 a.m.

**Board Members Present:**

Chair David L. Crandall
1st Vice Chair David L. Thomas
2nd Vice Chair Jennifer A. Johnson
Member Dixie L. Allen
Member Laura Belnap
Member Leslie B. Castle
Member Barbara W. Corry
Member Brittney Cummins
Member Linda B. Hansen
Member Mark Huntsman
Member Marlin K. Jensen (non-voting)
Member Steven R. Moore (non-voting)
Member Jefferson Moss
Member C. Mark Openshaw
Member Spencer F. Stokes
Member Nancy Tingey (non-voting)
Member Terryl Warner
Member Joel Wright

**Board Members Excused:**

Member Freddie Cooper (non-voting)
Member Kristin Elinkowski (non-voting)
Member Teresa L. Theurer (non-voting)

**Executive and Board Staff Present:**

Brad Smith, State Superintendent
Sydnee Dickson, Deputy Supt.
Judy Park, Associate Supt.
Bruce Williams, Associate Supt.
Joel Coleman, USDB Superintendent
Lorraine Austin, Board Secretary
Emilie Wheeler, Board Communications Specialist
Debbie Davis, Board Interim Internal Auditor
Chris Lacombe, Assistant A.G.
Nicole Call, Assistant A.G.

**Others Present:**

Lisa Nentl-Bloom, Utah Education Association; Michelle Rodgers; Cheryl Phipps, Utah PTA; Heather Gardner; Lydia Nuttall; Cindy Davis; Elizabeth Lim; LeAnn Wood

**Opening Business**

Chair David Crandall called the meeting to order at 8:00 a.m. Member Mark Openshaw led those present in the Pledge of Allegiance.

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Board Member Message

Member Linda Hansen related an experience she had at a book drive at a local elementary school. When the children taking the books realized they could keep them, there was joy on their faces. She learned that there are children that live around her that have needs she didn't know about. She related the experience to the Board, noting that as the Board sits in meetings without children before them, it may be easy to forget about the students. She encouraged Board members to remember that what they do does trickle down to the children and that the Board is needed.

Introduction of New Employees

Human Resources Director Dave Rodemack introduced new USOE employees Ricky Scott and Abigail Miller.

Assistant Attorney General Nicole Call, who will be working with the Board, was also introduced.

Acknowledgment of Student Artwork

Arts Specialist Cathy Jensen acknowledged the art work hung in the Board Room from Summit Academy Charter School, Oakwood Elementary School, and HMK Elementary School.

Changes to Agenda

Updates to the agenda were noted. Additions included Appointment of a TEC Representative and an update of the University of Phoenix-Utah Accreditation. Items 2-B, 2-C and 2-D were removed from the Finance Committee. The changes were appropriately noticed as required.

**Recognition/Achievement Spotlight**

Former Board Member Dean Rowley was thanked for his service on the Board. Mr. Rowley was the appointed Utah School Boards Association representative and served from 2011 through 2014. He was given a piece of original children's art work. He commented that it

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was a pleasure for him to serve on the Board and he appreciated the experience.

Deputy Superintendent Sydnee Dickson spotlighted the winners of the Utah LEGO League State Championship. On January 31 Team Jedi won the first place champions award. Each team built LEGO robots and developed innovation presentations. The team will compete this summer in the first world festival in St. Louis, Missouri. Team members included Tavo Estrada, Onalee Estrada, Kim, Katie and Allison Drennan, Jacob Anderson and Nicole Brooks. These young innovators and their coaches were applauded by the Board and presented with a Certificate of Excellence.

**Executive Session**

**MOTION** was made by Vice Chair Johnson and seconded by Member Huntsman that the Board move into Executive Session for the purpose of discussing the character, professional competence, and physical or mental health of individuals.

Upon voice vote of the members present, the Board moved into Executive Session at 8:16 a.m. Those present included Members Allen, Belnap, Castle, Corry, Crandall, Cummins, Hansen, Huntsman, Johnson, Jensen, Moore, Moss, Openshaw, Stokes, Thomas, Tingey, Warner and Wright; and Brad Smith, Sydnee Dickson, Lorraine Austin, Emilie Wheeler, Chris Lacombe and Nicole Call.

**MOTION** was made by Member Openshaw seconded by Member Wright that the Board come out of Executive Session.

Motion carried. The meeting reconvened in open session at 9:00 a.m.

**Public Comment**

Lydia Nuttall, parent - reported about a book she found about the Pledge of Allegiance where the page with the phrase “under God, indivisible” had been ripped out. She questioned what will happen to the nation if freedom from religion is supported. She expressed the desire to meet with the Governor and various organizations to promote liberty and justice for all in every aspect of life, and invited Board members to join with her.

Cindy Davis, parent - asked the Board to listen to those in true Title I schools as it

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considers the Elementary and Secondary Education Act (ESEA) waiver. She suggested that if the Board uses the same strong language used in the last waiver request, the Board will not have to request $30 million in funding from the legislature. She asked the Board to give those students every opportunity.

Dawn Davies, Utah PTA - relayed that PTA respectfully requests that the Board reapply for the ESEA waiver. Utah will maintain greater flexibility through its ability to use Title I funds at its discretion. She questioned whether Congress will reauthorize the Elementary and Secondary Education Act, and asked the Board to weigh very strongly the needs of students and move to reapply for the waiver.

Lisa Nentl-Bloom, Utah Education Association - updated the Board on the work UEA is doing with an assessment literacy task force. The goal is to develop curriculum to help their members use assessment to identify if students are achieving. This task force is almost finished with developing the curriculum and will train through spring and summer. She thanked the Board and Superintendent for the opportunity to collaborate with them during the legislative session. She also extended an offer from UEA to assist with rulemaking needed as a result of bills passed.

Jason Benson, parent - asked the Board to apply to for a waiver renewal of ESEA. As a principal of a Title I school, he sees the needs of those students who don't always have support at home. He is fighting for those students, and feels the responsibility to provide educational opportunities for them. He invited the Board to spend a day at his school with the teachers.

Michelle Rodgers - expressed that as a former educator and now parent of three children it's hard to ignore things happening at her local schools. Half the teachers have left since the adoption of the Common Core. She proposed that the things being done today that are wrong will continue if the ESEA waiver is continued, and asked the Board to vote for Utah's children by voting against any waiver.

Elizabeth Lim, advocate against sex abuse - shared that since Utah has implemented Aaron's Law a sex abuse prevention program is needed. She shared a book she has written, SCREAM. RUN. TELL. to teach children about sex abuse.

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**General Consent Calendar**

**MOTION** was made by Member Openshaw and seconded by Member Corry that the Board approve the General Consent Calendar.

Motion carried unanimously.

A. Minutes of Previous Meeting

Minutes of the State Board of Education meeting held February 6, 2015 were approved.

B. Monthly Budget Report

The Board received the monthly budget report.

C. Contracts

The Board approved the following contracts:

1. Precision Exams LLC, $393,691, 02/01/2015 to 1/31/2020

   To provide assistance to USOE in the development of the General Financial Literacy Assessment Training.

   This contract was mistakenly listed as a receivable on the Consent Calendar of the Board's January 8, 2015 meeting, and the Board approved it as such. It was resubmitted as a regular contract.

2. Educational Research and Training Corporation, $595,000, 03/20/2015 to 03/19/2020, federal

   To provide online Migrant Achievement and Performance System (MAPS)/State Migrant Education Program comprehensive needs assessment, State Service Delivery Plan, Migrant Education Program Evaluation, and Prospective Re-interview.

3. Utah Parent Center, $180,000, 03/09/2015 to 03/09/2020, federal

   To provide information and training to parents of children with disabilities through the Parent Training Information (PTI) Project of the Utah Parent Center.

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D. Contract Report

The Board received the report, *Upcoming Contracts with Renewals*.

E. Work Incentives Planning and Assistance Program (WIPA) Grant

The Board approved the Utah State Office of Rehabilitation (USOR) applying for renewal of the federal WIPA grant, and receipt of the grant funds.

F. R277-116 *Utah State Board of Education Internal Audit Procedure*

In its February 6, 2015 meeting, the Board approved amendments to R277-116 on second reading. The rule was amended to bring it into consistency with the Board Bylaws and update definitions of the Audit Committee and Internal Auditor.

The Board approved R277-116 *Utah State Board of Education Internal Audit Procedure*, as amended, on third and final reading.

G. R277-504 *Early Childhood, Elementary, Secondary, Special Education (K-12), and Preschool Special Education (Birth-Age 5) Licensure*

In its February 6, 2015 meeting, the Board approved amendments to R277-504 on second reading. The rule was amended to clarify the expectation of technology instruction for educator preparation programs to include instruction in the use of software for personalized learning. Amendments also updated language regarding working with students with disabilities to include positive behavior supports and Multi-Tiered Systems of Support (MTSS).

The Board approved R277-504 *Early Childhood, Elementary, Secondary, Special Education (K-12), and Preschool Special Education (Birth-Age 5) Licensure*, as amended, on third and final reading.

H. R280-200 *Rehabilitation*

In its February 6, 2015 meeting, the Board approved amendments to R280-200 on second reading. A new section was added to give clarity to the authority required for the State Office of Rehabilitation to make application for new federal grants or reallotment funding.

The Board approved R280-200 *Rehabilitation*, as amended, on third and final reading.

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I. Requests for Temporary Authorizations

The Board approve temporary authorizations for licenses as submitted by school districts and charter schools.

J. List of Educator Licenses Processed

The Board received the summary of the total number of educator licenses and license areas processed in February 2015.

**Elementary and Secondary Education Act (ESEA) Flexibility Renewal**

Superintendent Brad Smith reported that staff has prepared a request to renew the ESEA waiver with the understanding that it will not be submitted unless the Board approves. The due date for submitting the request is March 30, 2015. He reminded them that the Board sought $30 million from the legislature to backfill any potential loss of funding flexibility that would be caused by the lack of a waiver, but it does not appear that any appropriation for that $30 million request has been made.

Superintendent Smith presented three potential courses of action:

1. The Board could instruct the Superintendent to do nothing. The effect would be that no waiver renewal of ESEA would be sought and, therefore, the provisions of currently existing law, in particular No Child Left Behind (NCLB), would be implemented. It's unclear what that implementation would look like because under NCLB every school would be deemed a failing school. As there would be no non-failing schools it is unclear how the transportation requirement would be met.

2. The Board could direct him to finalize the application for a full waiver to be exempted from NCLB provisions for the next three years. The assertion of a waiver is subject to conditions posed by U.S. Department of Education. However, if a waiver were granted under the same terms and conditions accepted for the waiver last year, there would be a strong assertion of state sovereignty with the provision that the Board retain the complete right to alter assessments, evaluations, education standards, or any other aspect of the Utah education system without the opportunity of the federal government to cut off funding or take

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other punitive action.

3. The Board could request a partial or mini-waiver. The Board could request that specific obligations under NCLB be waived such as the obligation to implement evaluation or a particular assessment system under the statute be waived. The Board could also request a full waiver for less than three years.

Member Belnap asked for clarification about Utah's obligation to the federal government whether it seeks the waiver or not. It was clarified that Utah will be under federal obligation in either circumstance because of the federal dollars received. The Board has a choice of the set of federal regulations by which it will be governed. Superintendent Smith reported that the amount of federal money Utah receives will not change if a waiver isn't granted. It Utah is granted a waiver, local education agencies (LEAs) will retain local flexibility to spend Title I funds, as appropriate under the law, as they see fit. However, if Utah is not under a waiver and a school is designated a failing school under NCLB, then NCLB dictates how the school must spend some of its Title I money. This would include paying the transportation costs from a failing school to a non-failing school, and providing remedial or after-school programs. NCLB dictates a number of remedial measures for schools that are deemed failing under the law.

Member Moss reiterated that there would not be a loss of funds without a waiver. Superintendent Smith confirmed that and noted that the purpose of requesting the $30 million from the legislature was to make sure there would be no loss of flexibly available funds. Member Moss asked if there would be an enforceable mechanism for the use of those funds that are required to be set aside for failing schools under NCLB. Superintendent Smith indicated that the measures that are most the clear are remedial measures such as after-school programs. Transportation to non-failing schools is not clear.

Member Moss noted that North Dakota has received mini-waivers for its rural schools and suggested that Utah could pursue mini-waivers for specific areas. Member Castle expressed that she is not supportive of moving away from a relationship with the federal government. She suggested that prior to making a decision the Board talk with local superintendents and local school board members to address their needs.

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Vice Chair Johnson asked if there is a different deadline than March 30 for mini-waivers. Superintendent Smith was not aware of different time frame. He noted that North Dakota sought mini-waivers b outside of the deadline.

Member Warner questioned who, under NCLB, would make the decision regarding school support teams and how are the teams funded. Superintendent Smith responded that the local education agency (LEA) would hire school support teams using Title I funds received by the LEA. Every school in Year 1 School Improvement would have to hire a school support team.

Member Stokes asked for clarification if the waiver has anything to do with the Common Core. Superintendent Smith responded that the conditions the U.S. Department of Education purport to impose when a waiver is sought is for a state to adopt more rigorous education standards. No specific standards are listed. The waiver Utah received last year reserves the right for Utah to unilaterally change its standards as it chooses. Also, NCLB explicitly forbids the federal government from requiring states to adopt particular curricular standards. Member Stokes commented that if Utah doesn't ask for a waiver it would still need standards.

Vice Chair Thomas informed that last year he crafted the language for the waiver to ensure that the Board has authority for certifying that its standards are college and career ready without asking for approval from Higher Education.

Member Stokes asked what Utah would be getting out of by not requesting the identical waiver as the one now in place. There was some suggestion that Utah might not have to comply with requirements for an assessment system or teacher evaluation system under NCLB. Deputy Superintendent Dickson clarified that with the waiver all that it required now regarding educator evaluation is that we report what system is in place and outline how we're determining student growth. Utah's educator evaluation system is a result of legislation (SB 64, 2012 Legislative Session) and Board rule (R277-531). Nothing in the federal law dictates performance pay. She also reported that if Utah was to go back to NCLB without the waiver, 28 schools would be planning for restructuring in school year 2015-16.

Associate Superintendent Judy Park reported that the assessment system required

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under NCLB and state law was not affected by the flexibility waiver. The piece that was changed with the waiver was the accountability system. NCLB has a required system to which states must adhere; the waiver allows states to develop their own accountability systems.

Chair Crandall asked whether under the waiver Utah could change the teacher evaluation system and assessment system without approval from the federal government. Dr. Park responded that NCLB requires certain assessments and the waiver doesn't change that requirement. The requirement is for assessment in grades 3-8 and once in high school for language arts, math and science.

Member Coleman commented that it seems everything education has been doing for the last eight or nine years has been under the instigation of the federal government. He thinks we have squandered those years without reaching consensus on a direction.

Superintendent Smith expressed that he shares many of the deep-seated concerns about federal overreach. However, as a superintendent he knows that strong assessment systems, strong evaluation systems and standards-based education constitute a set of reforms that he believes are essential to producing students that are ready to compete and flourish in the modern world.

Member Cummins asked if Utah goes back under NCLB whether the school improvement status for schools would be retroactive, and if so, what the cost would be for the restructuring process. Associate Superintendent Park confirmed that placing schools in school improvement would be retroactive. ESEA and Special Programs Director Ann White informed that one school has gone through that process and it was costly, but she didn't have the dollar amounts. It was clarified that the cost of restructuring has not been figured into the cost of not renewing the waiver.

Member Cummins asked if, under NCLB, specific schools would lose funding because of the requirement to spread funds among more schools. Superintendent Smith responded that some schools could experience a diminution and redirection of funds.

Assistant Attorney General Chris Lacombe discussed his legal analysis regarding the legality of seeking a waiver. In Utah Code 53A-1-903 it suggests the Board is obligated to seek a waiver; however, in 53A-1-904, the statute states it is only necessary to seek a waiver if the

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federal government is violating NCLB Section 9527. The Section states the federal government can't mandate standards and curriculum, among other things. There is a plausible argument that if the Board believes the federal government, through NCLB and the waiver, is violating states rights to make standards, they need to seek a waiver from the law. He felt a more persuasive interpretation is from 53A-1-903 that indicates a waiver from federal regulation must be sought, but doesn't designate whether a full or partial waiver is required.

Vice Chair Johnson referenced a document the Board received last month from Utah Attorney General Reyes which states: "There may be federal entanglements with ESEA waiver conditions that require Utah to adopt and implement college and career ready standards. Since 2012 the U.S. Department of Education has issued Utah an ESEA waiver from No Child Left Behind requirements. In August 2014 Utah requested a one-year waiver extension which is currently being reviewed by the U.S. Department of Education. Under this waiver Utah must comply with the four waiver principles. One of those four principles is 'college and career ready expectations for all students.' This principle requires Utah 'adopt college and career ready standards in at least reading, language arts, and mathematics, transitioning to and implementing such standards statewide for all students in schools.' These ESEA waiver principles and conditions are not part of No Child Left Behind's express statutory terms. As a result a plausible argument exists that ESEA waiver conditions are U.S. Department of Education requirements and are not authorized by Congress in No Child Left Behind. In addition, Utah has been arguably coerced into complying with these ESEA waiver principles." She brought this to the Board's attention as it considers federal entanglements.

Vice Chair Johnson questioned why the state of Washington lost its waiver and if it was over an educator evaluation issue. Dr. Dickson couldn't address it in detail but responded that she understands one of the sticking points was student growth. Regarding student growth the waiver uses the term "significant" in regards to student growth, and there is no clear understanding of the term. Utah did not set a specific growth percentage because there is no research that shows student growth is attributable to the success of a teacher in a significant way. Some other states that did not use a percentage were not successful in obtaining a waiver. In her conversation with the federal government they felt that what is outlined in Utah

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Code and Board rule is significant enough that they allowed Utah to work towards a floor of forty percent. However, in subsequent conversations with the Department of Education, and in a meeting with the Governor and Department representatives, it was made very clear that Utah would control the student growth piece.

Chair Crandall and Member Moss asked if Utah would lose its waiver if growth isn't included in its accountability system. Dr. Dickson clarified that Utah would lose the waiver if it doesn't have an evaluation system. Components of the system have been changed with affecting the waiver. Dr. Dickson could not definitively confirm what the Department of Education will do if additional changes are made to Utah's system, but stated that it is the one principal for which staff has had a great deal of dialogue with the Department, and there was more concern with the time line than the components.

Member Moss expressed concern that staff does not know if Utah will lose its waiver if specific changes are made. Superintendent Smith reiterated that under the existing waiver Utah has reserved its right to make changes to the evaluation system, and the Department unequivocally and unambiguously granted the waiver under those conditions. He interpreted that acceptance to mean Utah can make changes to the system without loss of the waiver. If a further renewal of the waiver is sought on the same basis, he would stand by the same answer. Under implementing regulations it seems clear to him that in order to maintain a waiver under the regulations Utah would have to have an evaluation system that has to have student growth as part of the evaluation system. However, it appears that in granting Utah's waiver, a waiver of this foundational level has also been granted.

Member Moss further questioned if the waiver would only remain in place until Utah such time as Utah made a change on growth in its evaluation system. Superintendent Smith responded that given that the Department accepted the language without qualification he doesn't believe they could enforce that in court. Dr. Dickson added that there was inconsistency in how waivers were approved or disapproved, and there is not a set standard.

Member Stokes noted that in Attorney General Reyes' document on federal entanglements referenced earlier, it also states that "federal entanglements are debatable as to standards. No entanglement exists with respect to curriculum."

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**MOTION** was made by Member Stokes and seconded by Vice Chair Thomas that the Board authorize the State Superintendent to apply for a one-year Elementary and Secondary Education Act (ESEA) flexibility waiver renewal, under the same conditions as the last waiver, unless the legislature provides adequate funding to replace funding flexibility lost by not seeking the ESEA waiver.

Member Stokes clarified that the intent is for the Board not to seek a waiver if the funding is approved.

Member Cummins asked if there is an alternate plan if the waiver is not granted. Superintendent Smith responded that if a waiver request is not granted and another option were offered, he would come to the Board for approval prior to accepting anything outside the terms of the motion.

Vice Chair Johnson pointed out that there is currently a lawsuit pending with respect to the waivers. She expressed interest in understanding how this would play out and questioned what the fallout would be if the quid pro quo nature of the waivers is invalidated. Superintendent Smith responded that the existing lawsuit is the matter of Jindahl v. USA, seeking to declare that the entire waiver process is unconstitutional. The legal rationale has been captured in an upcoming *Vanderbilt Law Review* article entitled, "Federalizing Education by Waiver." The underlying argument is that the entire waiver process is unconstitutional because it seeks to impose by giving a waiver, provisions that Congress has never enacted and under terms and conditions that Congress has never provided the Secretary of Education the authorization to do. If that were correct the entire waiver process is unconstitutional, and therefore, the government would have given states something for which they had no authorization; therefore, the waiver would have no effect and all states would be back under NCLB as if no waiver had been extended. One of the things that struck him as he read the article was that there is strong lack of judicial precedent.

Member Hansen expressed support for the waiver whether the $30 million is appropriated or not. She is not in favor of the way schools are defined under NCLB and the schools that are really in need of improvement will not be identified. Under the waiver, the correct schools are identified and get the help they need.

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Member Castle asked if Utah goes back under NCLB, who is generally favored by the shift in funding. Superintendent Smith replied that funding for some schools will be reduced because there is the potential spreading of the funding over a greater number of recipients. If the legislature appropriates $30 million and Utah doesn't seek the waiver, the $30 million will represent new money into the system. Although under NCLB some Title I money would be redirected, schools would also receive flexible money from the $30 million.

Member Corry questioned why a three-year waiver wouldn't be sought. Member Stokes replied that a one-year waiver provides the Board with flexibility.

Member Belnap asked the Board to wait to vote on the motion until all Board member questions were answered.

**MOTION** was made by Vice Chair Johnson and seconded by Member Moss that the Board take a short break.

Motion carried. The Board took a five-minute break and reconvened at 10:50 a.m.

Member Belnap asked whether contingencies could be sought from No Child Left Behind if the Board does not seek a waiver. Superintendent Smith indicated it could be possible, but stated it seems the Board's negotiating power would be at its lowest point if the Board has not sought a waiver.

Member Warner questioned if it could cost schools more money than they will receive to implement corrective action. Superintendent Smith indicated it would depend on their plan.

Member Huntsman reported that every one of the ten districts he represents are in favor of the Board seeking the waiver, and indicated it would really hurt them if it is not granted. He expressed support for the waiver.

**MOTION TO AMEND** was made by Member Cummins and seconded by Member Warner that the Board apply for a one-year ESEA waiver, under the same conditions as the last waiver, without the condition of money from the legislature.

Member Stokes spoke against the motion to amend. He felt that by adding the piece about the legislative appropriation it allows the Board to involve the legislative body, and the appropriation would give the Board more flexibility in working with failing schools. Member Openshaw supported the idea of bringing new money into the system. Vice Chair Johnson also

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spoke against the amendment.

Member Cummins expressed a concern that with the legislative appropriation, the money would only be infused into the system for one year.

Motion to amend failed, with Member Cummins, Corry, Hansen, Huntsman and Warner in favor, and Members Allen, Belnap, Castle, Crandall, Johnson, Moss, Openshaw, Stokes, Thomas and Wright opposed.

Motion carried, with Members Allen, Castle, Corry, Hansen, Huntsman, Openshaw, Stokes, Thomas and Warner in favor, and Members Belnap, Crandall, Johnson, Moss and Wright opposed.

Member Stokes suggested that a letter be sent to the Executive Appropriations Committee outlining the action of the Board and again requesting the funding.

**Risk Mitigation Plan Update**

Associate Superintendent Bruce Williams gave an overview of the USOE Risk Mitigation Plan and presented a time line and status of work on the plan. Vice Chair Johnson distributed graphs showing the number of FTEs at the USOE and the number of local education agencies they serve.

Superintendent Williams reported that there are rent savings due to bonds on the building being paid off, and he suggested that the savings could be refocused to assist with risk mitigation. There is intent language being considered by the Public Education Appropriations Subcommittee to allow the use of that money for risk mitigation. The Board also approved the hiring of two additional auditors using one-time money. If more funding is appropriated the hope is to cover those costs using ongoing money.

Vice Chair Johnson emphasized the importance of the Board understanding the risks and time line of the risk mitigation, and ensuring that there is adequate response by the Board and Office.

Superintendent Williams noted that the first thing identified in the risk report is roles, responsibilities and communications, and it was noted that Superintendent Smith is working to give management a clear direction.

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Chair Crandall handed the gavel to Vice Chair Johnson and left the meeting. Vice Chair Thomas, Members Openshaw and Stokes, and Superintendent Smith also left the meeting for the purpose of participating in legislative meetings.

Member Warner asked where the discretionary funds approved for risk mitigation are listed in the USOE budget. Superintendent Williams responded that those funds are under the Administration area, but are not broken out. He indicated he could provide a report showing the breakdown of those funds.

Vice Chair Johnson asked Internal Auditor Debbie Davis for a description of risk assessment. Ms. Davis informed that risk assessment is a tool that management and internal auditors use. A risk assessment looks at an organization and identifies areas where there may be problems and opportunities that aren't being taken. Once a risk assessment is done management performs risk mitigation and the auditors determine where audits are needed. Risk assessments should be done on an annual basis. Mr. Williams reported that he and the internal auditors are working closely together to ensure they're moving forward on addressing the issues and hope to create an environment where risks are minimized.

Vice Chair Johnson asked what the responsibility of the Board is regarding the risks identified. Ms. Davis responded that the Board is charged with governance and is responsible for the use of funds. Ultimately assessing and monitoring risk is a management function which is delegated by the Board.

Vice Chair Johnson noted that the Board needs to reflect on what is has done to address concerns with respect to role clarity.

Member Moore expressed appreciation for the update on the plan. He noted that two things—a compensation plan and UCA monitoring system—have been accomplished since the plan came out last October. The rest of the work seems to be pending legislative appropriation, and he asked if there is an alternate plan for completing the work without the appropriation. He also questioned whether things could be done now without waiting on the resources.

Superintendent Williams responded that Superintendent Smith is taking the risk assessment very seriously, but many items are based on funding and would be very difficult to

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implement with additional funding. Deputy Superintendent Dickson also reported on Superintendent Smith's intention to conduct a zero-based budgeting and reprioritization process. More dialogue on that process will begin after the legislative session.

Mr. Williams also reported that the plan will be considered as the budgeting process for next fiscal year is conducted. It appears right now that there will be funding to address most of the problems. Some will be done through reallocation and some through additional funding.

Member Belnap asked how USOR is notifying the public of services they are no longer able to provide. Superintendent Williams reported that the biggest issue is with Vocational Rehabilitation services. Those clients already in the pipeline will still have services. It appears, based on information he has received, that there will be a legislative appropriation of $6.3 million for Vocational Rehabilitation, which would allow for continued services through the end of the fiscal year. This will be a temporary fix. The Board will have to consider whether USOR should accept federal reallotment funding.

Member Belnap reported that she has gotten calls from USOR clients indicating that their counselors are cancelling appointments and telling them not to come in. Stacy Cummins, USOR, explained that this shouldn't be happening. The USOR is on Order of Selection, but there are still pending services.

Vice Chair Johnson asked Board members to contact Board leadership with additional questions about USOR.

Member Moss left the meeting.

**Utah Professional Practices Advisory Commission Cases**

**MOTION** was made by Member Allen and seconded by Member Corry that the Board accept the UPPAC recommendation in Case No. 12-1105 and suspend the educator's Level 1 Secondary Education License for no less than three (3) years from the date of Board action pursuant to a stipulated agreement. Reinstatement, following a UPPAC hearing and recommendation, is subject to Board approval.

Motion carried; Members Crandall, Moss, Openshaw, Stokes and Thomas absent.

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**MOTION** was made by Member Allen and seconded by Member Corry that the Board accept the recommendation in UPPAC Case No. 13–1178 and suspend the educator's Level 2 Secondary and Career and Technical Education License for eighteen (18) months from August 1, 2014 pursuant to a stipulated agreement. Reinstatement, following a UPPAC hearing and recommendation, is subject to Board approval.

Without objection, the case was referred to Executive Session for discussion.

**Executive Session**

**MOTION** was made by Member Allen and seconded by Member Huntsman that the Board move into Executive Session for the purpose of discussing the character, professional competence, and physical or mental health of individuals. Upon voice vote of those Members present, the Board moved into Executive Session at 12:03 p.m.

Those present in Executive Session included Members Allen, Belnap, Castle, Corry, Cummins, Hansen, Huntsman, Jensen, Johnson, Moore, Tingey, Warner and Wright; and Sydnee Dickson, Lorraine Austin, Chris Lacombe, Nicole Call, Ben Rasmussen, Rachel Terry, and Nicole Ferguson.

Member Wright left the meeting.

**MOTION** was made by Member Huntsman and seconded by Member Cummins that the Board come out of Executive Session.

Motion carried. The Board reconvened in open meeting at 1:27 p.m.

**Executive Session Items**

UPPAC Cases

Motion to accept the UPPAC recommendation in Case No. 13-1178 failed, with Members Allen, Corry and Huntsman in favor, and Members Belnap, Castle, Cummins, Hansen, Johnson, and Warner opposed; Members Crandall, Moss, Openshaw, Stokes, Thomas and Wright absent.

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Appointments

**MOTION** was made by Member Hansen and seconded by Member Allen that the Board appoint Melissa Schindler to the State Rehabilitation Council and the Statewide Independent Living Council as the VR 121 representative.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

**Committee Reports**

**STANDARDS AND ASSESSMENT COMMITTEE**

Committee Chair Laura Belnap reported on the following items from the Committee.

R277-700-6 *The Elementary and Secondary School Core Curriculum - High School Requirements*

Rule R277-700-6 was amended to reflect changes the Board made in Utah high school graduation requirements, recognizing the General Financial Literacy course as an independent course separate from any core area, and adding a half unit of credit to the Social Studies graduation requirement. The Committee approved amendments to R277-700-6 on first reading.

**MOTION** from Committee that the Board approve R277-700-6 *The Elementary and Secondary School Core Curriculum - High School Requirements* on second reading.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

Social Studies Performance Standards Update

The Committee received a report regarding the revision process of the Secondary Social Studies Standards. Committee Chair Belnap thanked staff for their work on the standards.

The Committee asked for a one-page monthly summary from the USOE Teaching and Learning Section regarding standards revision.

Standards Review Committee Recommendations for Elementary Mathematics

The Committee received a report from the Standards Review Committee with recommendations for changes to the Elementary Mathematics Standards. A draft of the

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Standards will be presented in the May Board meeting.

The Committee gave direction to staff for additional changes to the Standards.

Standards Review Committee Recommendations for Secondary Mathematics

The Committee received a report from the Standards Review Committee with recommendations for changes to the Secondary Mathematics Standards. A draft of the Standards will be presented in the May Board meeting.

The Committee asked for a revised draft with particular focus on revising and aligning the Precalculus and Secondary I Honors, II Honors, and III Honors standards; revising and aligning the Statistics and Probability Standards across secondary courses; considering moving some of the standards in Secondary II to other courses; and revising ambiguous standards.

Utah Multi-Tiered System of Supports (UMTSS)

Two years ago the USOE received a five-year State Personnel Grant from the U.S. Department of Education to provide leadership and support for local education agencies in sustained implementation of evidence-based practices. Members of the UMTSS team provided the Committee with information about the grant and reviewed the progress of implementation.

**FINANCE COMMITTEE**

Committee Member Mark Huntsman reported on the following items from the Committee.

USOR Quarterly Budget Review

The committee received a budget report from the Utah State Office of Rehabilitation. The Committee requested that the USOR budget review be provided on a monthly basis.

R277-114 *Corrective Action and Withdrawal or Reduction of Program Funds*

The Committee reviewed R277-114 consistent with the Utah Administrative Rulemaking

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Act five-year review requirement.

The Committee approved on first reading continuation of R277-114 with an additional amendment to the rule as follows: Line 130 was changed to read, "The State Superintendent may withhold, reduce or terminate . . ."

**MOTION** from Committee that the Board approve continuation of R277-114 *Corrective Action and Withdrawal or Reduction of Program Funds*, and amendments to the rule, on second reading.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

FY 2015 USBE/USOE Budget Amendment

The Committee reviewed information about the USOE budget.

**MOTION** from Committee that the Board authorize hiring new internal auditors using the high end of the salary schedule analysis provided by the Board Internal Audit Director.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

**MOTION** from Committee that the Board authorize hiring a Financial Manager II in Internal Accounting using the rent savings in the Indirect Cost Pool.

Member Belnap asked if this is a new position, and Associate Superintendent Williams indicated that it is.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

It was reported that a demonstration/training will be provided to the Board in its April meeting regarding the BASE accounting system.

Finance Committee Requests for Data

The following requests for data were received by the Committee:

- An inventory of the services that the USOE provides to schools that aren't required by statute.
- A recommendation of software that may need to be purchased.
- A report on how much CDA and RDA money has been approved over the last ten to twenty years and the different types of projects that are being approved.

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- A report of the transportation percent paid to school districts and who determines the transportation rate.
- Regular budget workshops.
- Finalization of pupil accounting data.

Taxing Entity Committee Alternate Representative Appointment

**MOTION** from Committee that the Board appoint Daniel Ellis as the Board's alternate Taxing Entity Committee representative.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

**LAW AND LICENSING COMMITTEE**

Committee Member Terryl Warner reported on the following items from the Committee.

Addition or Change to Board Rule for Utah Schools for the Deaf and the Blind (USDB) Calculation of the Weighted Average Salary Adjustment (WASA) for USDB Educators (contracted) in Accordance with Utah Code 53A-25b-402

Utah Schools for the Deaf and the Blind Superintendent Joel Coleman spoke to the Committee regarding a proposal to add the USDB calculation of the weighted average salary adjustment (WASA) for USDB contracted educators to Board rule. The Board submits an annual proposal to the legislature; however, there is a two-year difference in the request, the availability of relevant data in mid-to-late-November, and the application of the wage adjustments. The formula for WASA is set forth in statute and the proposed rule would define the process.

A question was raised as to whether putting the calculation in rule would set a precedent for the need for additional rules regarding other financial computations. Assistant Attorney General Chris Lacombe was asked to provide research information to the Board on this issue, and to work with Superintendent Coleman to draft a rule for consideration at a future meeting.

R277-475 *Patriotic, Civic and Character Education*

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The Board reviewed R277-475 *Patriotic, Civic and Character Education* consistent with the Utah Administrative Rulemaking Act five-year review requirements, and reviewed suggested amendments from staff.

The Committee made additional amendments outlined on a distributed sheet. The Committee approved R277-475 for continuation and amendment on first reading,

**MOTION** from Committee that the Board approve continuation of R277-475 *Patriotic, Civic and Character Education*, and amendments to the rule, on second reading.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

R277-517-5 *Board and UPPAC Disciplinary Definitions and Actions—Board Disciplinary Actions*

The Committee reviewed proposed amendments to R277-517-5 to provide updated language for Board action against an educator for failure to respond to a complaint resulting in a default action, and an educator's failure to appear for a disciplinary hearing.

The Committee approved amendments to R277-517-5 on first reading.

**MOTION** from Committee that the Board approve R277-517-5 *Board and UPPAC Disciplinary Definitions and Actions—Board Disciplinary Action*, as amended, on second reading.

Member Corry asked if there was representation from the Utah Education Association at the Committee meeting. Member Warner responded that UEA was there and voiced some concerns about revocation. It was explained to them that there have been issues where the Board does not have the option to revoke the license of an educator who doesn't respond to the Utah Professional Practices Advisory Commission, but can only suspend the license for five years. This rule change provides greater flexibility to the Board.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

R277-516-3 *Education Employee Required Reports of Arrests and Required Background Check Policies for Non-licensed Employees—Licensed Public Education Employee Personal Reporting of Arrests*

The Committee reviewed proposed amendments to R277-516-3 to expand the requirements for licensed educator self-reporting from not only reports of arrest, but also

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citations and charges; and broadening of a list of specified offenses to report to make the offenses consistent with the educator ethics standards in R477-515.

The Committee approved the proposed amendments to R277-516-3, and additional amendments outlined on a distributed sheet, on first reading.

**MOTION** from Committee that the Board approve R277-516–3 *Education Employee Required Reports of Arrests and Required Background Check Policies for Non-licensed Employees—Licensed Public Education Employee Personal Reporting of Arrests*, as amended, on second reading.

Member Corry asked if the Utah Education Association was present in the Committee and was informed they were.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

R277-474 *School Instruction and Human Sexuality*

The Committee reviewed R277-474 consistent with the Utah Administrative Rulemaking Act five-year review requirement, and amendments suggested by staff. The Committee made additional amendments outlined on a distributed sheet.

The Committee approved on first reading continuation of and amendment to R277-474.

**MOTION** from Committee the Board approve R277-474 *School Instruction and Human Sexuality*, as amended, and continuation of the rule, on second reading.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

R277-459 *Teacher Supplies and Materials Appropriation*

The Committee reviewed R277-474 *Classroom Supplies Appropriation* consistent with the Utah Administrative Rulemaking Act five-year review requirement, and proposed amendments suggested by staff, including a change to the rule title. The Committee made an additional amendment on line 72 to change “shall” to “may.”

The Committee approved amendments to R277-474, and continuation of the rule, on first reading.

**MOTION** from Committee that the Board approve R277-474 *Teacher Supplies and*

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*Materials Appropriation*, as amended, and continuation of the rule, on second reading.

Motion carried; Members Crandall, Moss, Stokes, Thomas and Wright absent.

Member Castle reminded the Board that there has been a discussion about rules being rewritten for specific style and other changes. Vice Chair Johnson reported that she has discussed the needs with Superintendent Smith, and he will work on it when the new Associate Superintendent starts.

University of Phoenix Utah Accreditation Update

In its December 5, 2014 meeting, the Board was informed that USOE placed the University of Phoenix Utah on probationary status, consistent with R277-502, due to a denial of accreditation from the Council for Accreditation of Education Preparation (CAEP).

The Committee was apprised that the University appealed the CAEP decision and the appeal was granted. Since the granting of the appeal places the University of Phoenix back in the status of being a candidate for accreditation, USOE is removing the probation. If the University of Phoenix is approved for accreditation, they will work with USOE to present their program to the Board for final approval.

**R277-404 *Requirements for Assessment of Student Achievement***

Associate Superintendent Judy Park reported that Senator Aaron Osmond has put forth legislation that would add additional language around parents being able to excuse their children from testing. In conversation with Senator Osmond and the Board, the Senator indicated that if the Board were to put the language into a Board rule, he would pull the language from his bill.

A draft of R277-404 *Requirements for Assessment of Student Achievement* was distributed. Superintendent Park reviewed the major amendments to the rule.

1. Parents must complete a form on an annual basis to exempt their children from testing. The reason it must be done annually is because schools systems aren't set up to carry information such as the opt out from year to year.

2. A consistent form must be used for opt out. Dr. Park expressed that a consistent form

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would provide clarity between parents and the school regarding for which specific assessments the opt out request is being made.

3. A requirement has been added that the school must receive the opt out form at least five days prior to the assessment. This will help ensure that parents wishes are implemented.

4) Consequences of a student opting out of a test are governed at the local level.

Member Hansen questioned whether the form would be a checklist of tests for which students could opt out. Dr. Park responded that a checklist would be challenging as there are different tests for each grade. She clarified that the rule only covers statewide assessments, and that it is a local decision how to handle opt out of other assessments.

Member Cummins pointed out that paragraphs A and C in Section 6 seem to contradict each other. Superintendent Park responded that the difference is in the consequences for students.

Member Castle stated she would support Section 6-A being removed, because she is not sure if parents are primarily responsible for their children's education—at least financially. Assistant Attorney General Chris Lacombe verified that it has been established in Utah statute that parents are primarily responsible for their children's education. He described paragraph A as preparatory language or an introduction. There is no legal requirement or obligation in paragraph A. Member Castle asked what the rights and duties of education entities are and questioned why those aren't stated in the beginning of the rule. Mr. Lacombe responded that state statute is couched in terms of parent rights.

Member Tingey commented that if a student is absent and then returns to school there are often makeup days. She asked how that should be addressed in the rule. Dr. Park suggested that the process outlined in the rule, with the parent filling out the form, would be that the way to handle that situation.

Member Cummins pointed out that if a parent keeps a child home rather than using the opt out process, there could be a significant number of absences along with the penalties associated.

Member Belnap suggested that lines 48 and 49 be changed to SAGE rather than just summative. SAGE would include both formative and summative tests. Dr. Park responded that

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the term "SAGE" is used for a variety of things including a tool teachers use to develop quizzes assignments test.

Member Belnap requested that the Board approve the opt out form, and suggested it be a simple checklist. She expressed concern over the requirement to submit the form five days prior to a test as it takes away flexibility for parents.

Members Moss and Wright joined the meeting by phone.

Member Huntsman expressed concern regarding the roll out of the rule, and felt it could be perceived that assessment isn't important to the Board. He asked whether district superintendents and other educators have been involved in the process.

Dr. Park responded that teachers use assessment data for a variety of purposes and can provide teachers with valuable information. The question is how to support both parents in their rights and educators in their tasks.

Member Hansen asked how quickly the Board will need to approve the rule in response to Senator Osmond's legislation. Vice Chair Johnson recommended passing the rule on first reading or first and second reading today and bringing it back for third reading in April. Dr. Park expressed her feeling that Senator Osmond would recognize that timeline as good faith.

Member Tingey felt there should be just one form for both state and local opt out.

Member Moss questioned whether Senator Osmond is comfortable with the rule. He also asked if local education agencies have concerns about assessment using the SAGE platform, and wondered if there will be any push back from LEAs by not allowing individual schools to opt out because of the Board's platform.

Superintendent Park reported that Senator Osmond is comfortable with the language. As far as what this would mean for formative assessments, the definition in the law is for state required assessments, which are formative. If that were to be broadened to teacher-created assessments it could mean any tests teachers give on a daily basis, and would be very problematic for schools and districts. It is within schools' and districts' purview to not participate in SAGE interim tests that are not required.

Without objection the discussion was tabled to allow for discussion of the Board retreat.

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**Board Retreat**

Dates were considered for a two-day strategic planning retreat for the Board in April. It was determined that the Board Secretary will send out a poll on dates.

Member Allen left the meeting.

**R277-404 Discussion continued**

Member Castle asked why, when students are opting out of a test, instruction must be provided for them during the time other students are taking the assessment, since other students are not receiving instruction then. She opined that parents that sign forms opting their children out of tests acknowledge that they understand what is being lost by opting out of the test.

**MOTION** was made by Member Belnap and seconded by Member Warner that the Board approve R277-404 *Requirements for Assessments of Student Achievement*, as amended, on first reading, and that the rule come back to the Standards and Assessment Committee in the Board's April meeting for further review and amendment.

Member Cummins asked that it be clarified that the rule only applies to state administered summative tests. Vice Chair Johnson reported that the rule was intentionally written with regard to state administered tests and was specifically drafted to allow for local policy to govern local assessments.

Member Wright left the meeting.

Member Corry commented that the DIBELS assessment is required by state law, and questioned whether parents opting out of DIBELS would be in violation of the law. Assistant A.G. Lacombe responded that it depends what is being considered. There is also a statute that gives parents the right to opt out of tests that are administered statewide. Language in line 220 of the rule was written to deal with some ambiguity as to what is a statewide test, and defines it as an "assessment mandated by the Board or state statute."

Member Hansen commented that by not including formative tests it gives control back to local education agencies.

Vice Chair Johnson indicated she will make a personal invitation to Senator Osmond to

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speak to the Standards and Assessment Committee in April, should the motion pass.

Member Warner asked for verification that Senator Osmond is comfortable with the language limiting the opt out to only a portion of SAGE tests. Dr. Park replied that he is comfortable with the portion in the rule regarding state mandated assessments. She is not sure if he has seen the language in Section 6-A regarding parent responsibility. Member Warner mentioned that the Senator's bill covers interim, formative, and summative tests and commented they are all connected to SAGE. She wondered if he would be comfortable with those not being included in the rule.

Member Huntsman asked when the rule would be implemented, and Dr. Park indicated probably fall 2015.

Member Moss verified that the rule can still be changed in the next meeting after talking with Senator Osmond.

Motion carried; Members Allen, Crandall, Openshaw, Stokes, Thomas and Wright absent.

**Legislative Items**

Associate Superintendent Bruce Williams distributed information and gave an update of the Board's legislative funding requests.

He reported that the $6.3 million for USOR was approved. Vice Chair Johnson suggested it would be important for the Governor to sign that bill as soon as possible so USOR services could be restored for this fiscal year.

Vice Chair Johnson acknowledged the work of staff during the session.

Dr. Dickson expressed thanks to members of the legislature who have reached out to the Board and USOE. She has had many personal opportunities to speak to them at length and they have been very engaging and good to work with.

**Audit Committee Report**

Vice Chair Johnson handed the gavel to Member Terryl Warner in to report on the Audit Committee meeting held March 19, 2015.

The Committee discussed role clarity, expectations and procedures and several other

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items including a report from School Children's Trust Section Director Tim Donaldson about potential land exchanges. She reiterated that any member of the Board can attend the Audit Committee, but it is preferred that advance notice is given. Board members may also receive materials received by the Audit Committee.

Vice Chair Johnson reported that following the Audit Committee meeting the Board received working papers with respect to audits that are pending the response of management.

Vice Chair Johnson took back the gavel.

**Update on Educator Effectiveness**

This item was postponed until next month.

**Superintendent's Report**

No report was given.

**Board Chair's Report**

Vice Chair Johnson reported on some things being discussed by the Board Executive Committee.

Chair Crandall has requested a legislative post-mortem at the next regular meeting.

It was reported that several Board members will be attending the National Association of State Boards of Education (NASBE) Legislative Conference March 22-23. They will also be visiting Utah's Congressional Delegation.

It was reported that NASBE will hold training for new Board members in the summer.

**Board Member Closing Comments**

Member Hansen questioned whether the Board will be meeting on March 19 as scheduled. Vice Chair Johnson indicated Board that members should make themselves available. The meeting will be held at the call of the Chair.

**Adjournment**

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**MOTION** to adjourn was made by Member Castle and seconded by Member Corry. Motion carried. The meeting adjourned at 3:36 p.m.

Lorraine Austin, Board Secretary

Minutes pending approval

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# UTAH STATE BOARD OF EDUCATION
# LEGISLATIVE MEETING MINUTES

**March 19, 2015**

A legislative meeting of the Utah State Board of Education was held March 19, 2015 at the Utah State Office of Education, 250 East 500 South, Salt Lake City, Utah. Chair David Crandall conducted. The meeting commenced at 12:00 p.m.

**Board Members Present:**

Chair David L. Crandall
First Vice Chair David Thomas
Second Vice Chair Jennifer A. Johnson
Member Dixie L. Allen
Member Laura Belnap
Member Leslie B. Castle
Member Freddie Cooper (non-voting)
Member Brittney Cummins
Member Kristin Elinkowski (non-voting)
Member Linda B. Hansen
Member Mark Huntsman
Member Jefferson Moss
Member C. Mark Openshaw
Member Nancy Tingey (non-voting)
Member Terryl Warner

**Board Members Participating Electronically**

Member Barbara W. Corry
Member Teresa L. Theurer (non-voting)
Member Joel Wright

**Board Members Excused:**

Member Marlin K. Jensen (non-voting)
Member Steven R. Moore (non-voting)
Member Spencer F. Stokes

**Executive and Board Staff Present:**

Brad Smith, State Superintendent
Sydnee Dickson, Deputy Supt.
Bruce Williams, Associate Supt.
Lorraine Austin, Board Secretary
Emilie Wheeler, Board Communications Specialist
Debbie Davis, Board Internal Auditor

**Others Present:**

Superintendent McKell Withers, Salt Lake City School District; David Jones, Attorney General's Office; Jay Blain, Utah Education Association; Allison Nicholson, UEPC; Erin Preston; Morgan Jacobsen, *Deseret News*; Ben Wood, *Salt Lake Tribune*; Keith Lawrence, USOE; Karen Peterson

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**Opening Business**

Chair David Crandall called the meeting to order at 12:00 p.m.

**HB 360 1st Substitute *Utah Education Amendments***

Superintendent Brad Smith gave overview of HB 360S01 which involves a number of substantive amendments to the education code. The bill codifies what the Board has already started doing with respect to a ten-year plan and provides some specificity to that process. One of the prime concerns is regarding the requirement for the Board to obtain approval from the legislature for its ten-year plan.

The bill reorganizes the Board with respect to the non-voting members. Also, with respect to national education programs, the bill requires varying levels of either Board, gubernatorial or legislative approval. A concern is that the Governor has no normal constitutional authority over education. There is an extensive section defining the difference between education standards and education curriculum, and Superintendent Smith commented that this could be very useful for the Board in keeping faith with their constituents.

Superintendent Smith reported that he met yesterday with the bill's sponsor, Representative LaVar Christensen, to review the concerns. Representative Christensen has been gracious in being willing to sit down to explore those concerns and to commit to rerunning further legislation to correct the potential constitutional difficulties that have been identified.

Representative Christensen was welcomed to the meeting. He thanked the Board for the opportunity, and expressed that he didn't feel there were any constitutional issues in the bill. He stated the importance of elected representatives working together. He expressed that he is passionate about Article X of the Constitution and about upholding the authority of the State Board. The education Code hasn't been updated in 60 years, and there is no genesis in the beginning of that Code. The bill takes some guiding principles and moves them to the front of the Code and calls it a mission statement, or preamble.

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Representative Christensen addressed the various concerns regarding the bill. He noted that the phrase "core curriculum standards" is found throughout the education Code. This phrase is causing discomfort with the public. The bill makes it clear standards are at the state level and curriculum is at the local level.

The Representative pointed out that Section 53A-1-9 has existed for ten years. Initially federal programs were solely coming from the U.S. Department of Education. Now programs are coming from other entities. The changes in the legislation still defer to the Board.

He noted that the Board has until November 2016 to finalize its ten-year plan, and also to report a history going back 15 years. He felt this was a huge endorsement of the State Board. He explained that in line 110 the language regarding the report to the Education Interim Committee should have been changed from review and approval to review and recommendations. He indicated there is time to change the language in another legislative session prior to the due date of the plan, and stated a willingness to do so. He expressed his hope that this reassures the Board.

The Representative addressed the concern about requiring Governor approval for federal education agreements or national programs. The purpose of having Governor approval is to ensure that someone doesn't try to circumvent the process.

Vice Chair Thomas asked in terms of defining national programs how this would impact things such as the ACT test, where there is a requirement for all students to take the ACT test and the Board has received a specific appropriation to administer the test. He questioned whether the appropriation would suffice as compliance. Representative Christensen responded that if the Board would like a short list of things that might be identified as a national program he would consider that.

Representative Christensen stated that he feels the Board and legislature are more united than they have ever been. He sincerely believes that to not embrace this bill would be catastrophic and a step backwards. Every bill that gets added keeps being tacked to the end of the Code and a review is overdue.

Vice Chair Thomas indicated that the Board would welcome him working with Superintendent Smith and the Board's attorneys on changes to the bill.

DRAFT 2

Member Allen reported that the Utah School Boards Association has a concern that there are some non-voting members on the Board that the legislation removes from the Board. Those representative inform the Board and help the Board do a better job. Representative Christensen responded that he formed an education committee in his district a year ago, and the committee has met twice a month leading up to the legislative session. In that group there was a strong consensus that there are benefits for the Board to meet with other education professionals. This is something that is not lost in the bill. He was considering the most pure implementation of Article X of the Constitution. If keeping those members is something the Board wants, it could be done during the next session. The legislation provides for the Board to meet frequently with those education groups to receive their input, and nothing is lost by removing those appointed members named in statute.

Member Allen also noted that there are appointed members of the Board—the Utah School Boards Association and the Coalition of Minorities Advisory Council—that are not mentioned in the bill. Representative Christensen responded that the Board can appoint those members on their own; only the ones designated in statute were included in the bill.

Member Hansen thanked Representative Christensen for coming. She commented that though she is glad to see him today, she wished he had spoken with the Board earlier. She encouraged more interaction with the Board in the future when he is sponsoring education bills. She hoped he feels welcome to discuss bills with the Board to avoid the situation of the Board considering a veto request. Representative Christensen thanked her for the invitation. He expressed appreciation for the extensive and thorough interaction with the Board Chair and State Superintendent throughout the session.

Member Castle voiced her appreciation for the Representative's responses. She voiced that she is not sure there is a bill that is going to protect the Board or system from the ravages of a legislature that won't protect public education from interest groups that are shrill or extreme. She hoped that the Governor and legislature will listen to the Board and the public that want education funded at a different level. She is hoping for a relationship with legislators that will protect the education system. She expressed that she is happy to support this bill because she believes the Representative is willing to work with the Board.

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Representative Christensen responded that he loves public service, the people and the principles. He asked the Board to not get too discouraged. He reiterated that there is a generous window of time to make changes and a funded resource to give the Board the help it needs to accomplish the requirements of the bill.

Vice Chair Johnson asked if Board members could attend his community education meetings. He indicated he would be happy for them to attend.

Member Cooper pointed out that the Coalition of Minorities Advisory Council representative, an ex-officio member of the Board, is not included in the bill. The Representative responded that he could include it if the Board wishes. The Board doesn't need permission from statute to add ex-officio members or meet with anyone they want. Member Allen also noted that the Utah School Boards Association representative to the Board isn't included, and expressed the importance of the relationship between the state and local boards.

**Adjournment**

**MOTION** was made by Member Openshaw and seconded by Vice Chair Johnson that the meeting adjourn.

Motion carried. The meeting adjourned at 12:50 p.m.

Lorraine Austin, Board Secretary

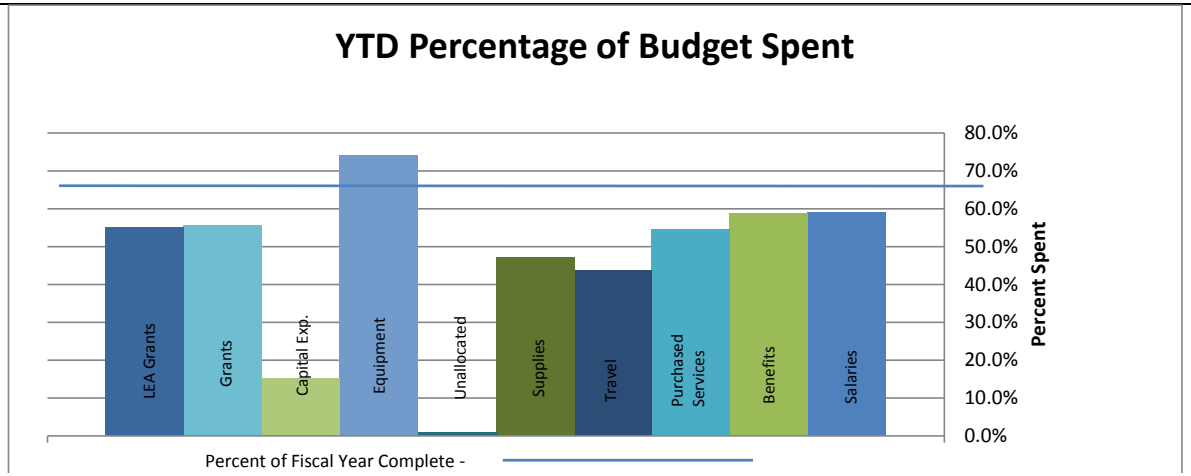
Members pending approval

# Utah State Board of Education Financial Report
## Fiscal Year 2015
## Month Ending Febrary 28, 2015
## Agency Totals

| % of FY Complete - | 67% |
|---|---|
| # of FTE Staff - | 1098.75 |

| Description | Original Budget | Current Budget | Current Month Expenditures | YTD Expenditures | Encumbrance | Budget Balance | % of Budget Spent |
|---|---|---|---|---|---|---|---|
| **EXPENDITURES** | | | | | | | |
| Salaries | 58,299,000 | 59,069,400 | 4,267,400 | 34,933,500 | - | 24,135,900 | 59.1% |
| Benefits | 31,843,100 | 33,231,200 | 2,378,300 | 19,512,800 | - | 13,718,400 | 58.7% |
| Purchased Services | 56,124,900 | 59,618,700 | 4,065,800 | 32,130,200 | 324,100 | 27,164,400 | 54.4% |
| Travel | 1,731,800 | 1,804,700 | 93,500 | 788,100 | 1,900 | 1,014,700 | 43.8% |
| Supplies & Materials | 14,624,200 | 18,604,400 | 1,583,100 | 8,376,200 | 401,500 | 9,826,700 | 47.2% |
| Unallocated Expenses | 7,591,500 | 4,056,100 | 1,100 | 42,600 | 100 | 4,013,400 | 1.1% |
| Equipment | 3,600,200 | 3,422,600 | 155,100 | 2,026,000 | 512,000 | 884,600 | 74.2% |
| Capital Expenditures | 626,000 | 591,800 | - | 38,100 | 52,400 | 501,300 | 15.3% |
| TOTAL EXPENDITURES | 174,440,700 | 180,398,900 | 12,544,300 | 97,847,500 | 1,292,000 | 81,259,400 | 55.0% |
| Grants & Transfers to Other Agencies | 134,795,300 | 125,934,500 | 6,933,600 | 54,922,700 | - | 71,011,800 | 43.6% |
| Flow Through Funds to LEAs | 3,182,148,300 | 3,716,944,700 | 268,587,900 | 2,064,808,400 | - | 1,652,136,300 | 55.6% |
| TOTAL EXP. & FLOW THROUGH | 3,491,384,300 | 4,023,278,100 | 288,065,800 | 2,217,578,600 | 1,292,000 | 1,804,407,500 | 55.2% |

| REVENUES | Original Budget | Current Budget | Current Month Revenue | YTD Revenues | Encumbrance | Budget Balance | % Received |
|---|---|---|---|---|---|---|---|
| State Sources | 2,915,381,800 | 3,239,747,600 | 240,899,400 | 1,936,938,700 | 734,000 | 1,302,074,900 | 59.8% |
| Federal Sources | 508,585,100 | 708,623,800 | 41,941,400 | 250,210,300 | 241,300 | 458,172,200 | 35.3% |
| Other Sources | 67,417,400 | 74,906,700 | 5,225,000 | 30,429,600 | 316,700 | 44,160,400 | 41.0% |
| TOTAL REVENUES & SOURCES | 3,491,384,300 | 4,023,278,100 | 288,065,800 | 2,217,578,600 | 1,292,000 | 1,804,407,500 | 55.2% |



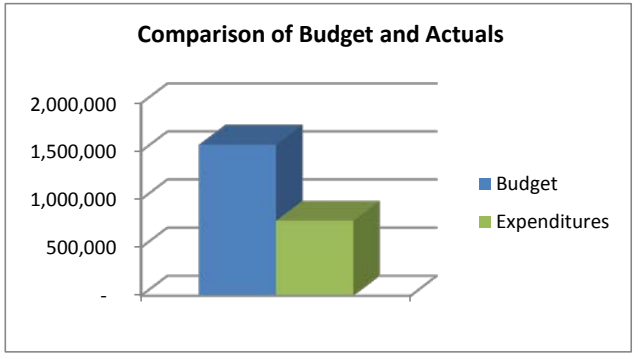
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 5

### Board of Education

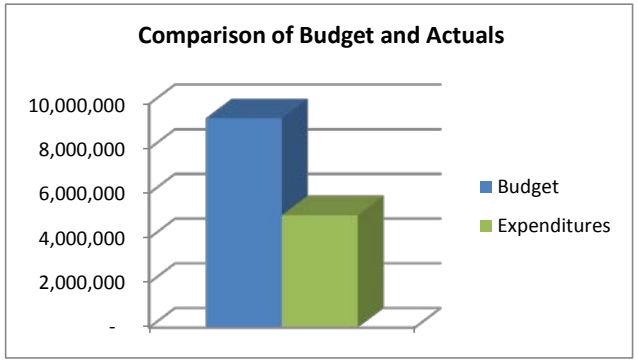
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 451,500 | 451,200 | 259,800 | - | 191,400 | 57.58% |
| Benefits | 338,700 | 339,000 | 188,200 | - | 150,800 | 55.52% |
| Purchased Services | 24,200 | 54,900 | 54,700 | 200 | - | 100.00% |
| Travel | 76,600 | 81,200 | 81,200 | - | - | 100.00% |
| Supplies & Materials | 175,800 | 512,600 | 117,800 | 75,200 | 319,600 | 37.65% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | 23,500 | 23,300 | 2,000 | - | 21,300 | 8.58% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 1,090,300 | 1,462,200 | 703,700 | 75,400 | 683,100 | 53.28% |
| Flow Through | 105,800 | 105,800 | - | - | 105,800 | 0.00% |
| Total Exp. & Flow Thru | 1,196,100 | 1,568,000 | 703,700 | 75,400 | 788,900 | 49.69% |




# of FTE Staff - 45

### Administration

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 2,866,200 | 2,965,600 | 1,872,700 | - | 1,092,900 | 63.15% |
| Benefits | 1,492,900 | 1,496,000 | 958,800 | - | 537,200 | 64.09% |
| Purchased Services | 1,589,900 | 3,157,900 | 654,000 | 2,500 | 2,501,400 | 20.79% |
| Travel | 16,600 | 24,000 | 11,500 | - | 12,500 | 47.92% |
| Supplies & Materials | 339,100 | 999,000 | 960,100 | 38,900 | - | 100.00% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | 770,300 | 398,800 | 174,300 | 224,500 | - | 100.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 7,075,000 | 9,041,300 | 4,631,400 | 265,900 | 4,144,000 | 54.17% |
| Flow Through | 62,500 | 325,000 | 130,500 | - | 194,500 | 40.15% |
| Total Exp. & Flow Thru | 7,137,500 | 9,366,300 | 4,761,900 | 265,900 | 4,338,500 | 53.68% |



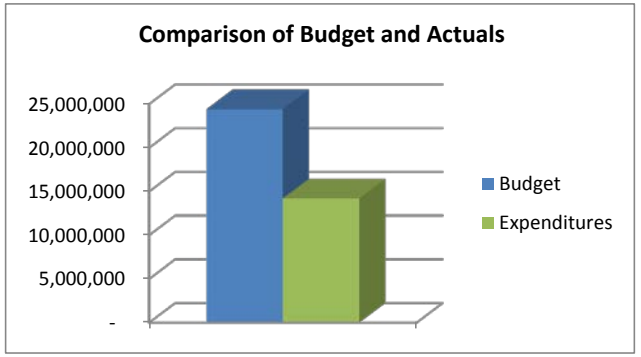
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete - 67%**

# of FTE Staff - 28

### Assessment and Accountability

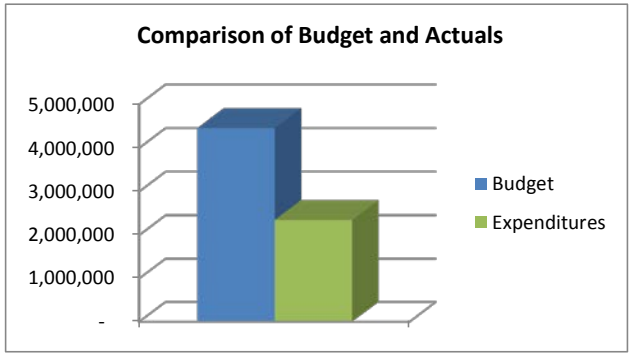
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 1,802,600 | 1,781,800 | 1,110,300 | - | 671,500 | 62.31% |
| Benefits | 1,019,400 | 1,010,400 | 611,200 | - | 399,200 | 60.49% |
| Purchased Services | 16,146,500 | 18,976,100 | 11,077,300 | - | 7,898,800 | 58.38% |
| Travel | 171,700 | 189,500 | 13,300 | - | 176,200 | 7.02% |
| Supplies & Materials | 262,000 | 158,200 | 25,800 | 100 | 132,300 | 16.37% |
| Unallocated Expenses | - | 38,000 | - | - | 38,000 | 0.00% |
| Equipment | 35,500 | 70,600 | 25,300 | 4,200 | 41,100 | 41.78% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 19,437,700 | 22,224,600 | 12,863,200 | 4,300 | 9,357,100 | 57.90% |
| Flow Through | 2,189,900 | 2,195,200 | 1,340,900 | - | 854,300 | 61.08% |
| Total Exp. & Flow Thru | 21,627,600 | 24,419,800 | 14,204,100 | 4,300 | 10,211,400 | 58.18% |




# of FTE Staff - 7

### Charter School Board

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 493,200 | 642,700 | 257,600 | - | 385,100 | 40.08% |
| Benefits | 278,500 | 279,000 | 137,900 | - | 141,100 | 49.43% |
| Purchased Services | 703,900 | 989,800 | 41,100 | - | 948,700 | 4.15% |
| Travel | 32,400 | 32,400 | 16,200 | - | 16,200 | 50.00% |
| Supplies & Materials | 241,300 | 236,900 | 22,500 | 1,000 | 213,400 | 9.92% |
| Unallocated Expenses | 15,900 | 15,900 | - | - | 15,900 | 0.00% |
| Equipment | 10,000 | 16,400 | 14,000 | 2,300 | 100 | 99.39% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 1,775,200 | 2,213,100 | 489,300 | 3,300 | 1,720,500 | 22.26% |
| Flow Through | 2,243,400 | 2,243,400 | 1,857,100 | - | 386,300 | 82.78% |
| Total Exp. & Flow Thru | 4,018,600 | 4,456,500 | 2,346,400 | 3,300 | 2,106,800 | 52.73% |



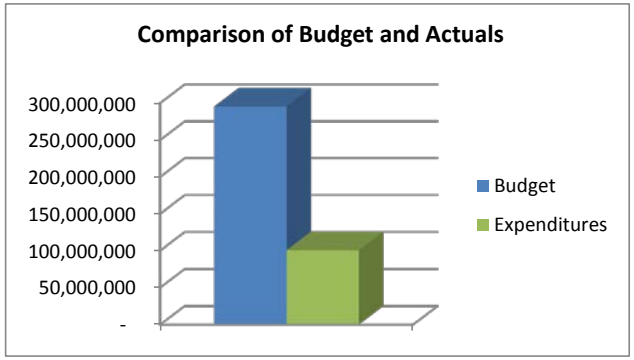
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 23

### Child Nutrition Programs

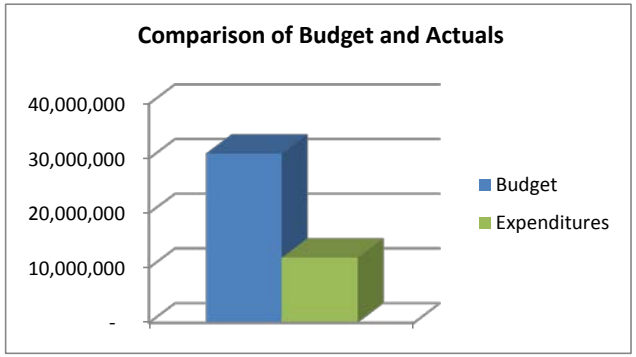
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 1,330,300 | 1,849,200 | 711,900 | - | 1,137,300 | 38.50% |
| Benefits | 701,600 | 961,800 | 407,100 | - | 554,700 | 42.33% |
| Purchased Services | 216,700 | 805,200 | 232,000 | 300 | 572,900 | 28.85% |
| Travel | 74,400 | 110,800 | 36,900 | - | 73,900 | 33.30% |
| Supplies & Materials | 257,200 | 288,200 | 215,500 | 800 | 71,900 | 75.05% |
| Unallocated Expenses | 94,900 | 93,900 | - | - | 93,900 | 0.00% |
| Equipment | 40,000 | 84,000 | 43,400 | 40,600 | - | 100.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 2,715,100 | 4,193,100 | 1,646,800 | 41,700 | 2,504,600 | 40.27% |
| Flow Through | 194,555,100 | 291,412,200 | 99,040,900 | - | 192,371,300 | 33.99% |
| Total Exp. & Flow Thru | 197,270,200 | 295,605,300 | 100,687,700 | 41,700 | 194,875,900 | 34.08% |




# of FTE Staff - 41.1

### Career and Technology Education

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 2,433,800 | 2,879,200 | 1,523,600 | - | 1,355,600 | 52.92% |
| Benefits | 1,294,400 | 1,423,100 | 833,900 | - | 589,200 | 58.60% |
| Purchased Services | 151,200 | 159,000 | 91,900 | - | 67,100 | 57.80% |
| Travel | 127,100 | 108,400 | 59,800 | - | 48,600 | 55.17% |
| Supplies & Materials | 985,200 | 865,300 | 233,300 | - | 632,000 | 26.96% |
| Unallocated Expenses | 44,500 | 636,800 | - | - | 636,800 | 0.00% |
| Equipment | 70,200 | 73,000 | 19,900 | 800 | 52,300 | 28.36% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 5,106,400 | 6,144,800 | 2,762,400 | 800 | 3,381,600 | 44.97% |
| Flow Through | 23,241,700 | 24,760,100 | 9,088,600 | - | 15,671,500 | 36.71% |
| Total Exp. & Flow Thru | 28,348,100 | 30,904,900 | 11,851,000 | 800 | 19,053,100 | 38.35% |



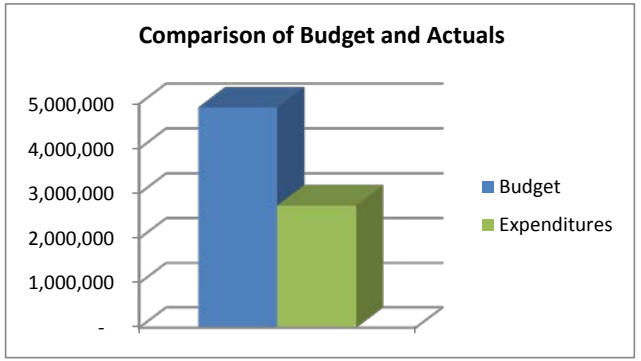
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 37

### District Computer Services

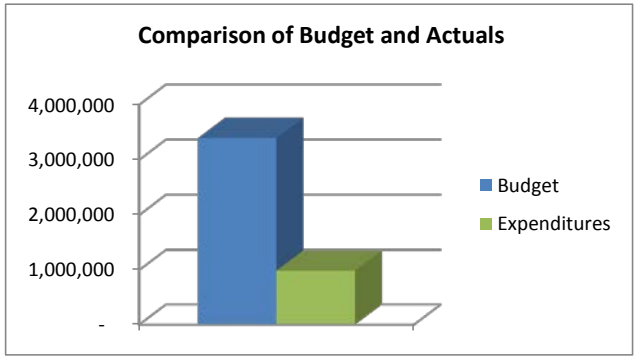
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 2,384,900 | 2,171,900 | 1,394,500 | - | 777,400 | 64.21% |
| Benefits | 1,363,500 | 1,411,800 | 764,600 | - | 647,200 | 54.16% |
| Purchased Services | 29,000 | 29,000 | 2,500 | 700 | 25,800 | 11.03% |
| Travel | 5,500 | 5,500 | 400 | - | 5,100 | 7.27% |
| Supplies & Materials | 233,500 | 530,100 | 376,100 | 13,500 | 140,500 | 73.50% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | 186,300 | 318,500 | 166,600 | 14,000 | 137,900 | 56.70% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 4,202,700 | 4,466,800 | 2,704,700 | 28,200 | 1,733,900 | 61.18% |
| Flow Through | 479,700 | 457,100 | 7,100 | - | 450,000 | 1.55% |
| Total Exp. & Flow Thru | 4,682,400 | 4,923,900 | 2,711,800 | 28,200 | 2,183,900 | 55.65% |




# of FTE Staff - 0

### Educational Contracts

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | - | - | - | - | - | 0.00% |
| Benefits | - | - | - | - | - | 0.00% |
| Purchased Services | - | - | - | - | - | 0.00% |
| Travel | - | - | - | - | - | 0.00% |
| Supplies & Materials | - | - | - | - | - | 0.00% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | - | - | - | - | - | 0.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | - | - | - | - | - | 0.00% |
| Flow Through | 3,137,800 | 3,396,000 | 991,300 | - | 2,404,700 | 29.19% |
| Total Exp. & Flow Thru | 3,137,800 | 3,396,000 | 991,300 | - | 2,404,700 | 29.19% |



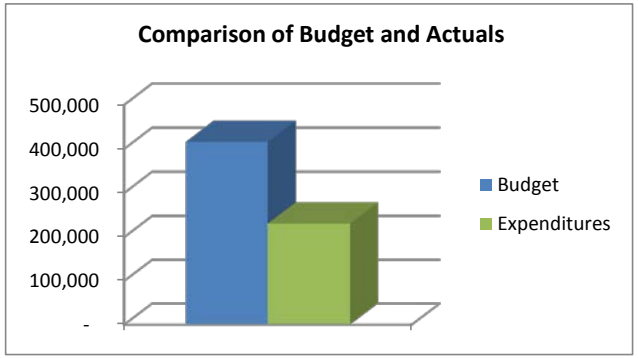
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete - 67%**

# of FTE Staff - 3

### Educational Equity

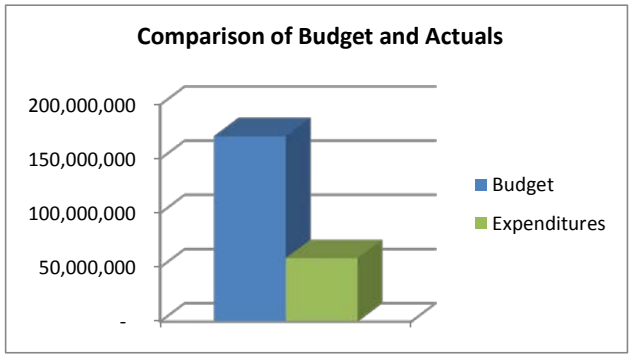
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 196,700 | 195,000 | 121,100 | - | 73,900 | 62.10% |
| Benefits | 111,600 | 111,500 | 70,000 | - | 41,500 | 62.78% |
| Purchased Services | 6,600 | 11,700 | 3,800 | - | 7,900 | 32.48% |
| Travel | 3,400 | 3,300 | 2,000 | - | 1,300 | 60.61% |
| Supplies & Materials | 25,600 | 52,200 | 14,100 | 1,600 | 36,500 | 30.08% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | 2,700 | 700 | 300 | 100 | 300 | 57.14% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 346,600 | 374,400 | 211,300 | 1,700 | 161,400 | 56.89% |
| Flow Through | 41,300 | 41,500 | 17,900 | - | 23,600 | 43.13% |
| Total Exp. & Flow Thru | 387,900 | 415,900 | 229,200 | 1,700 | 185,000 | 55.52% |




# of FTE Staff - 18.25

### ESEA and Special Programs

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 1,604,000 | 1,068,800 | 618,800 | - | 450,000 | 57.90% |
| Benefits | 16,400 | 551,000 | 351,500 | - | 199,500 | 63.79% |
| Purchased Services | 322,000 | 369,100 | 119,300 | 12,300 | 237,500 | 35.65% |
| Travel | 61,700 | 100,100 | 26,900 | - | 73,200 | 26.87% |
| Supplies & Materials | 477,500 | 626,500 | 174,600 | 100 | 451,800 | 27.89% |
| Unallocated Expenses | 1,900,200 | 1,272,500 | - | - | 1,272,500 | 0.00% |
| Equipment | 20,300 | 76,900 | 24,300 | 15,100 | 37,500 | 51.24% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 4,402,100 | 4,064,900 | 1,315,400 | 27,500 | 2,722,000 | 33.04% |
| Flow Through | 79,649,300 | 167,098,500 | 57,358,400 | - | 109,740,100 | 34.33% |
| Total Exp. & Flow Thru | 84,051,400 | 171,163,400 | 58,673,800 | 27,500 | 112,462,100 | 34.30% |



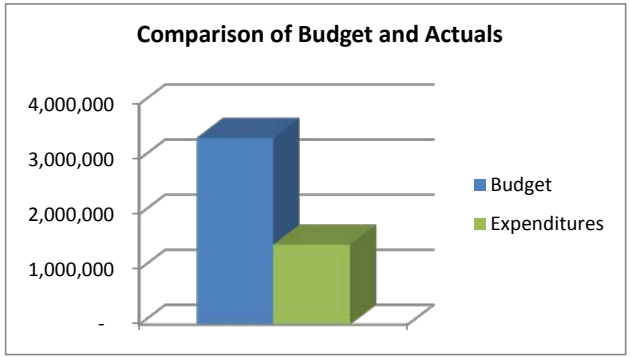
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 0

### Fine Arts (POPS)

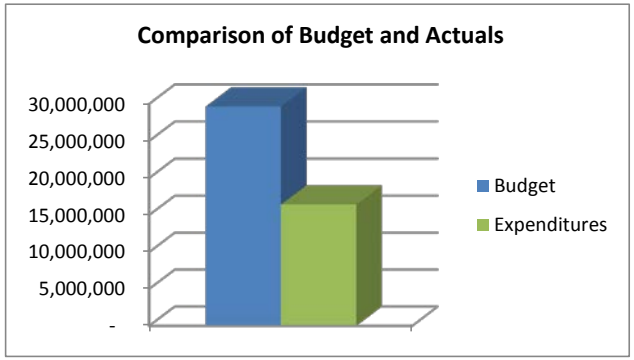
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | - | - | - | - | - | 0.00% |
| Benefits | - | - | - | - | - | 0.00% |
| Purchased Services | - | - | - | - | - | 0.00% |
| Travel | - | - | - | - | - | 0.00% |
| Supplies & Materials | - | - | - | - | - | 0.00% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | - | - | - | - | - | 0.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | - | - | - | - | - | 0.00% |
| Flow Through | 3,325,000 | 3,390,900 | 1,454,300 | - | 1,936,600 | 42.89% |
| Total Exp. & Flow Thru | 3,325,000 | 3,390,900 | 1,454,300 | - | 1,936,600 | 42.89% |




# of FTE Staff - 4.4

### Grants and Contracts

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 231,600 | 263,200 | 113,000 | - | 150,200 | 42.93% |
| Benefits | 101,400 | 118,500 | 51,500 | - | 67,000 | 43.46% |
| Purchased Services | 21,929,700 | 21,491,800 | 12,384,600 | 167,500 | 8,939,700 | 58.40% |
| Travel | 15,300 | 15,000 | 200 | - | 14,800 | 1.33% |
| Supplies & Materials | 4,224,200 | 5,103,500 | 2,852,800 | - | 2,250,700 | 55.90% |
| Unallocated Expenses | 257,700 | 262,500 | 2,500 | - | 260,000 | 0.95% |
| Equipment | 328,300 | 328,300 | 299,800 | - | 28,500 | 91.32% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 27,088,200 | 27,582,800 | 15,704,400 | 167,500 | 11,710,900 | 57.54% |
| Flow Through | 1,440,200 | 2,048,300 | 549,800 | - | 1,498,500 | 26.84% |
| Total Exp. & Flow Thru | 28,528,400 | 29,631,100 | 16,254,200 | 167,500 | 13,209,400 | 55.42% |



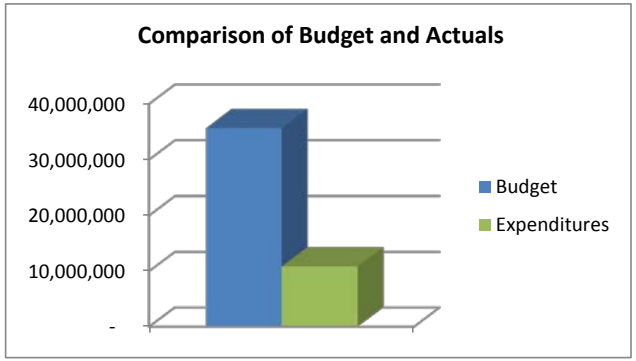
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete - 67%**

# of FTE Staff - 36.5

### Instructional Services-Teaching and Learning

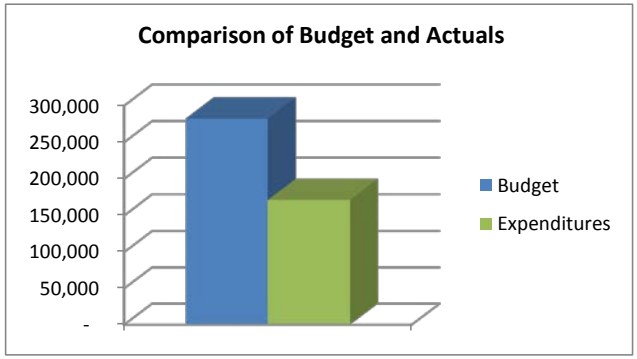
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 1,908,800 | 1,708,900 | 1,028,500 | - | 680,400 | 60.18% |
| Benefits | 974,900 | 842,400 | 555,600 | - | 286,800 | 65.95% |
| Purchased Services | 758,100 | 1,107,000 | 384,900 | 900 | 721,200 | 34.85% |
| Travel | 70,900 | 66,000 | 49,500 | - | 16,500 | 75.00% |
| Supplies & Materials | 1,838,800 | 2,220,500 | 376,100 | - | 1,844,400 | 16.94% |
| Unallocated Expenses | 500,000 | 27,100 | - | - | 27,100 | 0.00% |
| Equipment | 7,700 | 9,100 | 3,800 | 1,800 | 3,500 | 61.54% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 6,059,200 | 5,981,000 | 2,398,400 | 2,700 | 3,579,900 | 40.15% |
| Flow Through | 32,072,700 | 29,666,700 | 8,479,100 | - | 21,187,600 | 28.58% |
| Total Exp. & Flow Thru | 38,131,900 | 35,647,700 | 10,877,500 | 2,700 | 24,767,500 | 30.52% |




# of FTE Staff - 2

### Law and Legislation

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 150,400 | 150,300 | 96,900 | - | 53,400 | 64.47% |
| Benefits | 79,100 | 78,800 | 53,300 | - | 25,500 | 67.64% |
| Purchased Services | 7,900 | 7,300 | 1,300 | - | 6,000 | 17.81% |
| Travel | 4,200 | 3,900 | 1,500 | - | 2,400 | 38.46% |
| Supplies & Materials | 7,700 | 8,900 | 4,400 | 200 | 4,300 | 51.69% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | 2,400 | 2,200 | - | - | 2,200 | 0.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 251,700 | 251,400 | 157,400 | 200 | 93,800 | 62.69% |
| Flow Through | 30,800 | 31,100 | 13,600 | - | 17,500 | 43.73% |
| Total Exp. & Flow Thru | 282,500 | 282,500 | 171,000 | 200 | 111,300 | 60.60% |



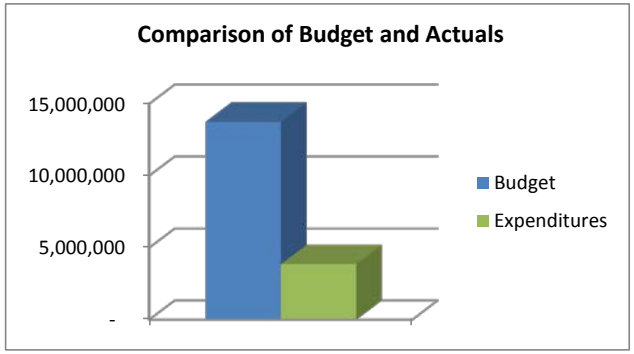
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 17.2

### Licensing and UPPAC

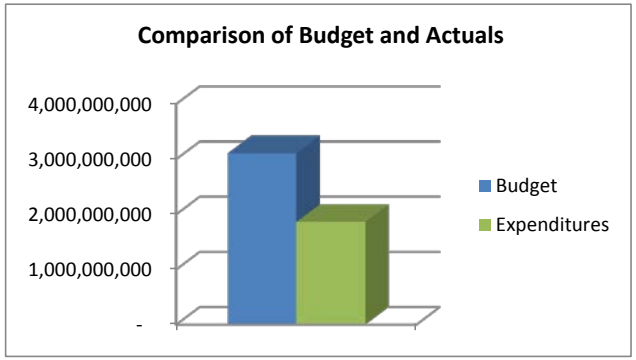
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 845,300 | 990,200 | 506,300 | - | 483,900 | 51.13% |
| Benefits | 515,900 | 512,600 | 284,200 | - | 228,400 | 55.44% |
| Purchased Services | 832,600 | 760,800 | 242,500 | 48,200 | 470,100 | 38.21% |
| Travel | 12,700 | 12,400 | 3,500 | - | 8,900 | 28.23% |
| Supplies & Materials | 180,200 | 393,700 | 139,200 | 5,800 | 248,700 | 36.83% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | 2,000 | 18,900 | 18,800 | 100 | - | 100.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 2,388,700 | 2,688,600 | 1,194,500 | 54,100 | 1,440,000 | 46.44% |
| Flow Through | 6,206,900 | 11,067,400 | 2,616,500 | - | 8,450,900 | 23.64% |
| Total Exp. & Flow Thru | 8,595,600 | 13,756,000 | 3,811,000 | 54,100 | 9,890,900 | 28.10% |




# of FTE Staff - 0

### Minimum School Program

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | - | - | - | - | - | 0.00% |
| Benefits | - | - | - | - | - | 0.00% |
| Purchased Services | - | - | - | - | - | 0.00% |
| Travel | - | - | - | - | - | 0.00% |
| Supplies & Materials | - | - | - | - | - | 0.00% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | - | - | - | - | - | 0.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | - | - | - | - | - | 0.00% |
| Flow Through | 2,788,612,900 | 3,108,199,700 | 1,863,712,600 | - | 1,244,487,100 | 59.96% |
| Total Exp. & Flow Thru | 2,788,612,900 | 3,108,199,700 | 1,863,712,600 | - | 1,244,487,100 | 59.96% |



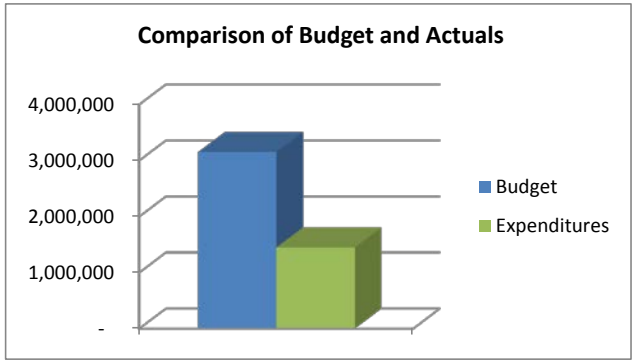
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete - 67%**

# of FTE Staff - 16

### School Finance

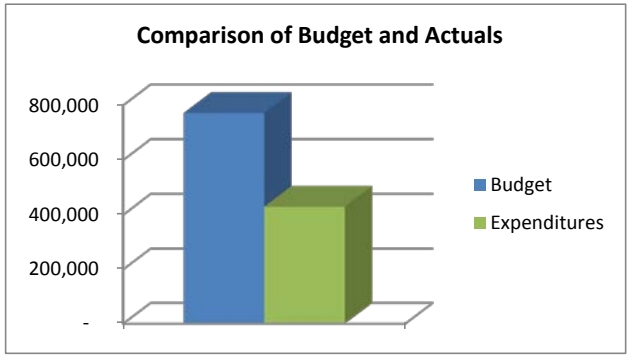
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 1,033,300 | 1,021,800 | 627,900 | - | 393,900 | 61.45% |
| Benefits | 584,900 | 589,000 | 360,800 | - | 228,200 | 61.26% |
| Purchased Services | 276,900 | 465,300 | 3,900 | - | 461,400 | 0.84% |
| Travel | 47,600 | 49,400 | 18,200 | - | 31,200 | 36.84% |
| Supplies & Materials | 64,400 | 64,700 | 11,000 | 100 | 53,600 | 17.16% |
| Unallocated Expenses | 13,700 | - | - | - | - | 0.00% |
| Equipment | 15,200 | 15,300 | 3,100 | 1,200 | 11,000 | 28.10% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 2,036,000 | 2,205,500 | 1,024,900 | 1,300 | 1,179,300 | 46.53% |
| Flow Through | 733,800 | 946,700 | 425,000 | - | 521,700 | 44.89% |
| Total Exp. & Flow Thru | 2,769,800 | 3,152,200 | 1,449,900 | 1,300 | 1,701,000 | 46.04% |




# of FTE Staff - 4

### School Trust Lands

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 280,500 | 283,200 | 177,300 | - | 105,900 | 62.61% |
| Benefits | 152,800 | 157,200 | 98,600 | - | 58,600 | 62.72% |
| Purchased Services | 68,600 | 66,100 | 33,700 | 600 | 31,800 | 51.89% |
| Travel | 12,000 | 19,800 | 12,000 | - | 7,800 | 60.61% |
| Supplies & Materials | 39,100 | 27,400 | 5,700 | - | 21,700 | 20.80% |
| Unallocated Expenses | 15,000 | - | - | - | - | 0.00% |
| Equipment | 2,300 | 4,000 | 1,400 | - | 2,600 | 35.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 570,300 | 557,700 | 328,700 | 600 | 228,400 | 59.05% |
| Flow Through | 138,100 | 214,000 | 100,300 | - | 113,700 | 46.87% |
| Total Exp. & Flow Thru | 708,400 | 771,700 | 429,000 | 600 | 342,100 | 55.67% |



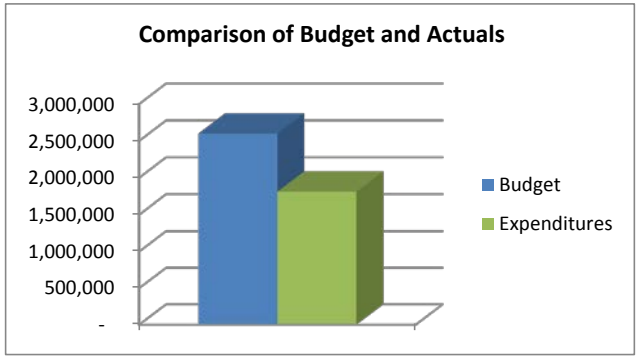
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 0

### Science (Isee)

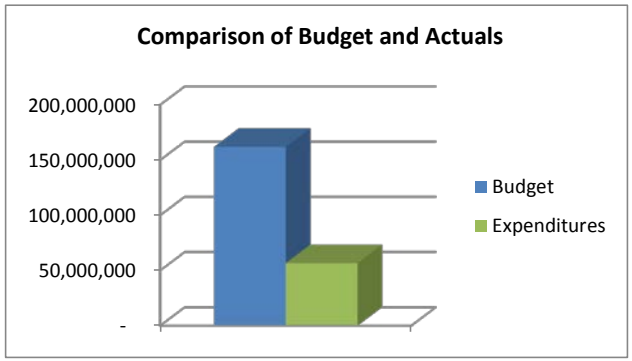
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | - | - | - | - | - | 0.00% |
| Benefits | - | - | - | - | - | 0.00% |
| Purchased Services | - | - | - | - | - | 0.00% |
| Travel | - | - | - | - | - | 0.00% |
| Supplies & Materials | - | - | - | - | - | 0.00% |
| Unallocated Expenses | - | - | - | - | - | 0.00% |
| Equipment | - | - | - | - | - | 0.00% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | - | - | - | - | - | 0.00% |
| Flow Through | 2,600,000 | 2,600,000 | 1,811,200 | - | 788,800 | 69.66% |
| Total Exp. & Flow Thru | 2,600,000 | 2,600,000 | 1,811,200 | - | 788,800 | 69.66% |




# of FTE Staff - 22.6

### Special Education

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 1,822,300 | 1,517,400 | 929,100 | - | 588,300 | 61.23% |
| Benefits | 846,400 | 829,200 | 500,700 | - | 328,500 | 60.38% |
| Purchased Services | 5,215,200 | 2,496,000 | 961,300 | - | 1,534,700 | 38.51% |
| Travel | 163,800 | 149,300 | 55,300 | - | 94,000 | 37.04% |
| Supplies & Materials | 282,000 | 537,900 | 215,500 | 5,400 | 317,000 | 41.07% |
| Unallocated Expenses | 4,318,400 | 1,133,200 | - | - | 1,133,200 | 0.00% |
| Equipment | 41,700 | 113,600 | 84,800 | 5,800 | 23,000 | 79.75% |
| Capital Expenditures | - | - | - | - | - | 0.00% |
| TOTAL EXPENDITURES | 12,689,800 | 6,776,600 | 2,746,700 | 11,200 | 4,018,700 | 40.70% |
| Flow Through | 132,975,300 | 155,201,900 | 54,037,900 | - | 101,164,000 | 34.82% |
| Total Exp. & Flow Thru | 145,665,100 | 161,978,500 | 56,784,600 | 11,200 | 105,182,700 | 35.06% |



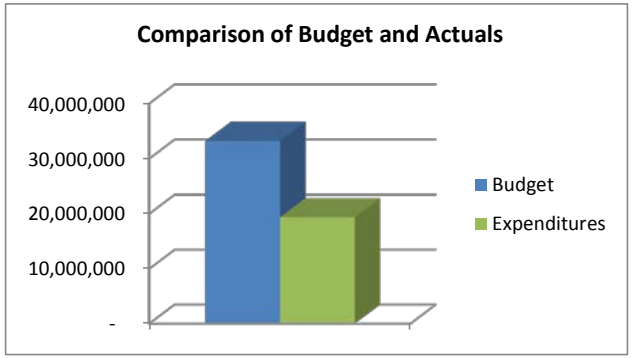
## Department Budget & Expenditures Breakdown
## Fiscal Year 2015
## Month Ending Febrary 28, 2015

**% of FY Complete · 67%**

# of FTE Staff - 332

### Schools for Deaf and Blind

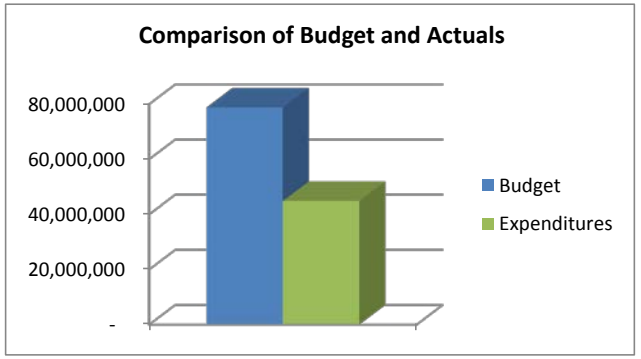
| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 15,473,700 | 15,480,400 | 9,331,000 | - | 6,149,400 | 60.28% |
| Benefits | 8,717,100 | 8,726,400 | 5,225,400 | - | 3,501,000 | 59.88% |
| Purchased Services | 4,899,500 | 5,009,600 | 3,194,600 | 17,300 | 1,797,700 | 64.11% |
| Travel | 462,300 | 459,700 | 248,400 | 1,900 | 209,400 | 54.45% |
| Supplies & Materials | 2,197,700 | 2,858,500 | 863,800 | 69,700 | 1,925,000 | 32.66% |
| Unallocated Expenses | - | 250,000 | 1,100 | - | 248,900 | 0.44% |
| Equipment | 238,700 | 412,200 | 403,200 | 9,000 | - | 100.00% |
| Capital Expenditures | 26,000 | 30,800 | - | 18,900 | 11,900 | 61.36% |
| TOTAL EXPENDITURES | 32,015,000 | 33,227,600 | 19,267,500 | 116,800 | 13,843,300 | 58.34% |
| Flow Through | - | - | - | - | - | 0.00% |
| Total Exp. & Flow Thru | 32,015,000 | 33,227,600 | 19,267,500 | 116,800 | 13,843,300 | 58.34% |




# of FTE Staff - 461.7

### State Office of Rehabilitation

| Description | Original Budget | Budget | Year-to-date Expenditures | Encumbrances | Budget Balance | % Spent |
|---|---|---|---|---|---|---|
| Salaries | 22,989,900 | 23,648,600 | 14,253,300 | - | 9,395,300 | 60.27% |
| Benefits | 13,253,800 | 13,793,300 | 8,059,400 | - | 5,733,900 | 58.43% |
| Purchased Services | 2,946,200 | 3,662,000 | 2,646,800 | 73,500 | 941,700 | 74.28% |
| Travel | 373,700 | 374,100 | 151,400 | - | 222,700 | 40.47% |
| Supplies & Materials | 2,792,800 | 3,120,400 | 1,767,800 | 189,100 | 1,163,500 | 62.71% |
| Unallocated Expenses | 431,300 | 326,200 | 39,000 | 100 | 287,100 | 11.99% |
| Equipment | 1,803,200 | 1,457,000 | 741,100 | 192,600 | 523,300 | 64.08% |
| Capital Expenditures | 600,000 | 561,000 | 38,100 | 33,500 | 489,400 | 12.76% |
| TOTAL EXPENDITURES | 45,190,900 | 46,942,600 | 27,696,900 | 488,800 | 18,756,900 | 60.04% |
| Flow Through | 37,901,400 | 31,853,600 | 16,664,300 | - | 15,189,300 | 52.32% |
| Total Exp. & Flow Thru | 83,092,300 | 78,796,200 | 44,361,200 | 488,800 | 33,946,200 | 56.92% |



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5/2002

UTAH STATE OFFICE OF EDUCATION/UTAH STATE OFFICE OF REHABILITATION

# Contract

| State No. |
|---|
| Agency No. 5186 |

| | |
|---|---|
| Contractor and Address:<br>National Staff Development Council<br>Aka Learning Forward<br>504 South Locust Street<br>Oxford, Ohio 45056 | Vendor No.<br>70702B<br>Commodity Code: |

| | | |
|---|---|---|
| Agency Monitor: Diana Suddreth | Amount: $ 239,825 | From: 04/01/2015 To: 03/31/2020 |

Schedule of Payments:
Upon receipt of invoice for services.

Purpose of Contract:

Support the state in auditing the quality and impact of professional learning experienced by educators in Utah public schools.

Correlation with Board Goals: Aggregate the current state of PD for educators as aligned with the Utah Professional Learning Standards

| | | Yes | No |
|---|---|---|---|
| Greater than $5,000 | This contract was entered into as a result of the state-level bidding process bid MP15024-1. | X | |
| | The proposals were reviewed by an in-agency committee, and the least costly and best-performance proposal was selected. | | X |
| Less than $5,000 | This contract was entered into as a result of the state-level bidding process (RX was processed). | | |
| | The proposals were reviewed by an in-agency committee, and the least costly and best-performance proposal was selected. | | |
| General Information | The contract was awarded using appropriate policy and procedures. | X | |
| | The employment goals of the affirmative action program were followed. | X | |
| | A conflict of interest involving USOE/USOR staff exists. | | X |
| | The contract uses federal funds. | | X |

| | Agency | Organ | Fund | Object | Activity | Project | Phase |
|---|---|---|---|---|---|---|---|
| 2480 | 400 | 0661 | PAH | 6137 | T015 | 66125 | 000 |
| 2480 | 400 | 0881 | PA | | T | | 000 |
| 2480 | 400 | | PA | | T | | |

Agency approval certifies that all parties herein receiving frees, stipends, or other payment in excess of approved travel and per diem reimbursement will receive no remuneration from another state agency, state institution, school district, or other political subdivision (unless so stated in the parties' annual employment contract) for the time and service that they claim payment from the USOE in relation to this request. Upon final approval by State Finance:

Original: attach to documents
Duplicate: division accountant
Triplicate: division/unit

**Division Superintendent or Designee** **Date**

**Accounting** **Date**

**Superintendent/Executive Director or Designee** **Date**

**Prepared by: smcray**

ap

C-3

Aug. 95

UTAH STATE OFFICE OF EDUCATIION/UTAH STATE OFFICE OF REHABILITATION

# Contract Information

State No.

Agency No. For Office Use Only 5187

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Contractor and Address: | SR + Plus Consulting, LLC<br>537 N. West Capitol Street<br>Salt Lake City, UT 84103 | | | | | Vendor No.<br>VC0000186725<br>Commodity Code 91838 | |
| Agency Monitor: | Carol Anderson | Amount $ | 92,060.41 | From | April 1, 2015 | To | March 31, 2020 |

Schedule of Payments
Reimbursement requests for actual expenditures may be requested as often as monthly. Invoices are required with requests. Expenditures through June 30th, each year must be invoiced and reach USOE by July 5th of current year.

Purpose of Contract: To provide Individuals with Disabilities Education Act (IDEA) behavior support services to Local Education Agencies (LEA's) and the Utah State Office of Education Special Education Section (USOE-SES).

Correlation with Board Goals: Services for students with special needs.

| | | Yes | No |
|---|---|---|---|
| Greater than $5,000 | This contract was entered into as a result of the state-level bidding process: Bid #MP 15032 | X | |
| | The proposals were reviewed by an in-agency committee and the least-costly and best-performance proposal was selected. | X | |
| Less than $5,000 | This contract was entered into as a result of the state-level bidding process (RX was processed). | | |
| | The proposals were reviewed by an in-agency committee and the least-costly and best-performance proposal was selected. | | |
| General Information | The contract was awarded using appropriate policy and procedures. | X | |
| | The employment goals of the affirmative action program were followed. | X | |
| | A conflict of interest involving USOE/USOR staff exists. | | X |
| | The contract uses federal funds. | X | |

Agency approval certifies that all parties herein receiving fees, stipends or other payment in excess of approved travel and perfume reimbursement will receive no remuneration from another state agency, state institution, school district, or other political sub-division (unless so stated in the parties' annual employment contract) for the time and service that they claim payment from the USOE in relation to this request.

| Fund | Agency | Organ | Approp | Object | Activity | | Project |
|---|---|---|---|---|---|---|---|
| 2400 | 400 | 0780 | PAT | 6137 | T195 | | 78072000 |
| | | | | | | | |

Upon final approval by State Finance:
Original: attach to documents
Duplicate: division accountant
Triplicate: division/unit
Quadruplicate: Board agenda

Prepared by: Sandra Cox

Division Superintendent or Designee — Date

Accounting — Date

Superintendent/Executive Director or Designee — Date

Leah Voorhies
3/26/15

app

C-3

Aug. 95

UTAH STATE OFFICE OF EDUCATIION/UTAH STATE OFFICE OF REHABILITATION

# Contract Information

State No.

Agency No. For Office Use Only 5188

| | | | |
|---|---|---|---|
| Contractor and Address: | Echo Cunningham<br>2643 South Beverly Street<br>Salt Lake City, UT 84106 | Vendor No.<br>VC0000167168<br>Commodity Code 91838 | |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Agency Monitor: | Carol Anderson | Amount $ | 229,354.67 | From | April 1, 2015 | To | March 31, 2020 |

Schedule of Payments
Reimbursement requests for actual expenditures may be requested as often as monthly. Invoices are required with requests. Expenditures through June 30th, each year must be invoiced and reach USOE by July 5th of current year.

Purpose of Contract: To provide Individuals with Disabilities Education Act (IDEA) behavior support services to Local Education Agencies (LEA's) and the Utah State Office of Education Special Education Section (USOE-SES).

Correlation with Board Goals: Services for students with special needs.

| | | Yes | No |
|---|---|---|---|
| Greater than $5,000 | This contract was entered into as a result of the state-level bidding process: Bid #MP 15032 | X | |
| | The proposals were reviewed by an in-agency committee and the least-costly and best-performance proposal was selected. | X | |
| Less than $5,000 | This contract was entered into as a result of the state-level bidding process (RX was processed). | | |
| | The proposals were reviewed by an in-agency committee and the least-costly and best-performance proposal was selected. | | |
| General Information | The contract was awarded using appropriate policy and procedures. | X | |
| | The employment goals of the affirmative action program were followed. | X | |
| | A conflict of interest involving USOE/USOR staff exists. | | X |
| | The contract uses federal funds. | X | |

Agency approval certifies that all parties herein receiving fees, stipends or other payment in excess of approved travel and perfume reimbursement will receive no remuneration from another state agency, state institution, school district, or other political sub-division (unless so stated in the parties' annual employment contract) for the time and service that they claim payment from the USOE in relation to this request.

| Fund | Agency | Organ | Approp | Object | Activity | | Project |
|---|---|---|---|---|---|---|---|
| 2400 | 400 | 0780 | PAT | 6137 | T195 | | 78072000 |
| | | | | | | | |

Upon final approval by State Finance:
Original: attach to documents
Duplicate: division accountant
Triplicate: division/unit
Quadruplicate: Board agenda

Prepared by: Sandra Cox

Division Superintendent or Designee — Date

Accounting — Date

Superintendent/Executive Director or Designee — Date

Leah Voorhees
3/26/15

Mpr

C-3

Aug. 95

UTAH STATE OFFICE OF EDUCATIION/UTAH STATE OFFICE OF REHABILITATION

# Contract Information

State No.

Agency No. For Office Use Only 9189

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Contractor and Address: | iBehave Consulting, Inc.<br>291 North 200 West<br>Tooele, UT 84074 | | | | | Vendor No.<br>VC0000190986<br>Commodity Code 91838 | |
| Agency Monitor: | Carol Anderson | Amount $ | 283,507.85 | From | April 1, 2015 | To | March 31, 2020 |

Schedule of Payments
Reimbursement requests for actual expenditures may be requested as often as monthly. Invoices are required with requests. Expenditures through June 30th, each year must be invoiced and reach USOE by July 5th of current year.

Purpose of Contract: To provide Individuals with Disabilities Education Act (IDEA) behavior support services to Local Education Agencies (LEA's) and the Utah State Office of Education Special Education Section (USOE-SES).

Correlation with Board Goals: Services for students with special needs.

| | | Yes | No |
|---|---|---|---|
| Greater than $5,000 | This contract was entered into as a result of the state-level bidding process: Bid #MP 15032 | X | |
| | The proposals were reviewed by an in-agency committee and the least-costly and best-performance proposal was selected. | X | |
| Less than $5,000 | This contract was entered into as a result of the state-level bidding process (RX was processed). | | |
| | The proposals were reviewed by an in-agency committee and the least-costly and best-performance proposal was selected. | | |
| General Information | The contract was awarded using appropriate policy and procedures. | X | |
| | The employment goals of the affirmative action program were followed. | X | |
| | A conflict of interest involving USOE/USOR staff exists. | | X |
| | The contract uses federal funds. | X | |

Agency approval certifies that all parties herein receiving fees, stipends or other payment in excess of approved travel and perfume reimbursement will receive no remuneration from another state agency, state institution, school district, or other political sub-division (unless so stated in the parties' annual employment contract) for the time and service that they claim payment from the USOE in relation to this request.

| Fund | Agency | Organ | Approp | Object | Activity | | Project |
|---|---|---|---|---|---|---|---|
| 2400 | 400 | 0780 | PAT | 6137 | T195 | | 78072000 |
| | | | | | | | |

Upon final approval by State Finance:
Original: attach to documents
Duplicate: division accountant
Triplicate: division/unit
Quadruplicate: Board agenda

Prepared by: Sandra Cox

Division Superintendent or Designee — Date

Accounting — Date

Superintendent/Executive Director or Designee — Date

Leah Varhies
3/26/15

Ap'

C-3

Aug. 95

UTAH STATE OFFICE OF EDUCATIION/UTAH STATE OFFICE OF REHABILITATION

# Contract Information

State No.

Agency No. For Office Use Only 5190

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Contractor and Address: | USU Special Education & Rehab – Utah Behavior Clinic<br>2865 Old Main Hill<br>Logan, UT 84322 | | | | | Vendor No. 01760H<br>Commodity Code 91838 | |
| Agency Monitor: | Carol Anderson | Amount $ | 286,693.33 | From | April 1, 2015 | To | March 31, 2020 |

Schedule of Payments
Reimbursement requests for actual expenditures may be requested as often as monthly. Invoices are required with requests. Expenditures through June 30th, each year must be invoiced and reach USOE by July 5th of current year.

Purpose of Contract: To provide Individuals with Disabilities Education Act (IDEA) behavior support services to Local Education Agencies (LEA's) and the Utah State Office of Education Special Education Section (USOE-SES).

Correlation with Board Goals: Services for students with special needs.

| | | Yes | No |
|---|---|---|---|
| Greater than $5,000 | This contract was entered into as a result of the state-level bidding process: Bid #MP 15032 | X | |
| | The proposals were reviewed by an in-agency committee and the least-costly and best-performance proposal was selected. | X | |
| Less than $5,000 | This contract was entered into as a result of the state-level bidding process (RX was processed). | | |
| | The proposals were reviewed by an in-agency committee and the least-costly and best-performance proposal was selected. | | |
| General Information | The contract was awarded using appropriate policy and procedures. | X | |
| | The employment goals of the affirmative action program were followed. | X | |
| | A conflict of interest involving USOE/USOR staff exists. | | X |
| | The contract uses federal funds. | X | |

Agency approval certifies that all parties herein receiving fees, stipends or other payment in excess of approved travel and perfume reimbursement will receive no remuneration from another state agency, state institution, school district, or other political sub-division (unless so stated in the parties' annual employment contract) for the time and service that they claim payment from the USOE in relation to this request.

| Fund | Agency | Organ | Approp | Object | Activity | | Project |
|---|---|---|---|---|---|---|---|
| 2400 | 400 | 0780 | PAT | 6137 | T195 | | 78072000 |
| | | | | | | | |

Upon final approval by State Finance:
Original: attach to documents
Duplicate: division accountant
Triplicate: division/unit
Quadruplicate: Board agenda

Prepared by: Sandra Cox

Division Superintendent or Designee — Date

Accounting — Date

Superintendent/Executive Director or Designee — Date

3/20/15

C-3 Ap'
Aug. 95

UTAH STATE OFFICE OF EDUCATIION/UTAH STATE OFFICE OF REHABILITATION

# Contract Information

State No.

Agency No. For Office Use Only 5191

| | | |
|---|---|---|
| Contractor and Address | Education Direction<br>515 East 100 South , Suite 300<br>Salt Lake City, Utah 84102-4211 | Vendor No<br>VC0000186423<br>Commodity Code<br>91838 |

Agency Monitor: Jo Ellen Shaeffer, Joseph Borrack | Amount $ 4,061,412.55 | From 5/1/2015 | To 4/30/2020

Schedule of Payments:

Original amount of contract $ 4,061,412.55

Total amount $ 4,061,412.55

Purpose of Contract:

The purpose of contract is for Education Direction to work with the USOE to develop and implement professional learning (PL) experiences for schools and districts to assist them in effectively using data to improve student achievement.

Correlation with Board Goals:

| | | Yes | No |
|---|---|---|---|
| Greater than $5,000 | This contract was entered into as a result of the state-level bidding process (RX was processed) **RQM 400-52-7** | XX | |
| | The proposals were reviewed by an in-agency committee and the least-costly and best-performance proposal was selected. | XX | |
| Less than $5,000 | This contract was entered into as a result of the state-level bidding process (RX was processed). | | |
| | The proposals were reviewed by an in-agency committee and the least-costly and best-performance proposal was selected. | | |
| General Information | The contract was awarded using appropriate policy and procedures. | XX | |
| | The employment goals of the affirmative action program were followed. | XX | |
| | A conflict of interest involving USOE/USOR staff exists. | | XX |
| | The contract uses federal funds. | XX | |

Agency approval certifies that all parties herein receiving fees, stipends or other payment in excess of approved travel and perfume reimbursement will receive no remuneration from another state agency, state institution, school district, or other political sub-division (unless so stated in the parties' annual employment contract) for the time and service that they claim payment from the USOE in relation to this request.

| Fund | Agency | Organ | Approp | Object | Activity | Project | Phase |
|---|---|---|---|---|---|---|---|
| 2480 | 400 | 0760 | PAJ | 6137 | T765 | 76030 | 000 |
| | | | | | | | |

Upon final approval by State Finance:
Original: attach to documents
Duplicate: division accountant
Triplicate: division/unit
Quadruplicate: Board agenda

Division Superintendent or Designee — Date

Prepared by: Noralee Green 538-7815

Accounting — Date

Superintendent/Executive Director or Designee — Date

| Contracts approved by State Superintendent or USOR Director (less than $100,000) | | | | | | | |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| **Agency Contract #** | **Vendor** | **Original Contract** | **Previous Amendment Amount** | **Current Amendment Amount** | **Total Contract Amount** | **Expiration Contract Dates** | **Contract Purpose** |
| | | | | | | | |
| 136036 | MicroScribe Publishing | 35,000.00 | $70,000.00 | $35,000.00 | 140,000.00 | 06/30/16 | services for students with special needs |
| new | Active Re-Entry | 6,500.00 | | | 6,500.00 | 10/15/18 | ASPIRE |
| 126299 | Cohne, Kinghorn P.C. | 0.00 | $100,000.00 | | 100,000.00 | 03/19/17 | UPPAC/pick up last two yr renewal option - name change |
| | | | | | | | |

USOE/USORAgency Contracts w/Renewals

| Contract Number | Vendor Name | Section | Contract Monitor | Contract Begin Date | Contract End Date | Status | Comments |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| 146378 | Old Dominion | CNP | Barbie Faust | 8/1/2014 | 7/31/2015 | | |
| | | | | | | | |

**R277. Education, Administration.**

**R277-114. Corrective Action and Withdrawal or Reduction of Program Funds.**

**R277-114-1. Authority and Purpose.**

A. This rule is authorized by Utah Constitution Article X, Section 3 which vests general control and supervision of public education in the Board and by Section 53A-1-401(3) which allows the Board to adopt rules in accordance with its responsibilities.

B. The purpose of the rule is to provide procedures for public education Program monitoring and corrective action for noncompliance with identified Program requirements, Program accountability standards, and financial propriety.

**R277-114-2. Definitions.**

A. “Board” means the Utah State Board of Education.

B. “Program” means a public education project or plan under the direction of the Board.

C. “Recipient” means an LEA or a school.

D. “State Superintendent” means the State Superintendent of Public Instruction as defined under Section 53A-1-301, or his or her designee.

**R277-114-3. State Superintendent Responsibilities.**

A. Program Monitoring

(1) For each Program, the State Superintendent shall design and implement a consistent monitoring program that includes standards for both Program outcomes and Program financial compliance.

(2) The State Superintendent shall notify all Recipients of the initiation of or changes to any monitoring program.

(3) The State Superintendent shall monitor compliance with Program outcomes, reporting requirements, and financial compliance.

B. Corrective Action Plans

(1) The State Superintendent shall place a Recipient on a corrective action plan when a Recipient does not demonstrate satisfactory Program outcomes, demonstrates noncompliance with Program requirements or allowable Program expenditures, or does not comply with requests to provide accurate and complete Program or financial information.

(2) The State Superintendent shall clearly outline in a corrective action plan all areas of noncompliance and establish a reasonable time frame for the Recipient to correct identified issues.

(3) The State Superintendent shall give notice and copy of the corrective action plan in writing to the Recipient administrators and respective LEA board.

C. The State Superintendent may withhold, reduce or terminate funding for Recipient noncompliance.

D. The State Superintendent shall report to the Board monthly about the status of noncompliant Program Recipients.

**R277-114-4. Recipient Appeals.**

A Recipient may file an appeal to the Board of any adverse decision of the State Superintendent resulting from a corrective action plan or withholding of funds. An appeal must be made in writing and within 30 days of the date of the State Superintendent's action.

**KEY: programs, noncompliance, corrective action**
**Date of Enactment or Last Substantive Amendment: 2015**
**Notice of Continuation: 2015**
**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-1-401(3)**

**R277. Education, Administration.**
**R277-459. Teacher Supplies and Materials Appropriation.**
**R277-459-1. Authority and Purpose.**

A. This rule is authorized under Utah Constitution Article X, Section 3 which gives general control and supervision of the public school system to the Board, by Section 53A-1-402(1)(b) which directs the Board to establish rules and minimum standards for school programs, and by state legislation which provides a designated appropriation for teacher supplies and materials.

B. The purpose of this rule is to distribute money through LEAs to classroom teachers for school materials, supplies, field trips, and purposes or equipment that protect the health of teachers in instructional or lab settings or in conjunction with field trips.

**R277-459-2. Definitions.**

A. "Board" means the Utah State Board of Education.

B. "Classroom teacher" definition criteria:

(1) Eligible teachers shall be in a permanent teacher position filled by one teacher or two or more job-sharing teachers employed by a school district, the Utah Schools for the Deaf and the Blind, or charter schools.

(2) Eligible teachers are licensed personnel, and paid on a school district's salary schedule or a charter school's salary schedule.

(3) Teachers shall be employed for an entire contract period.

(4) The teacher's primary responsibility shall be to provide instructional or a combination of instructional and counseling services to students in public schools.

C. "Comprehensive Administration of Credentials for Teachers in Utah Schools (CACTUS)" means the electronic file maintained on all licensed Utah educators. The file includes such as:

(1) personal directory information;
(2) educational background;
(3) endorsements;
(4) employment history;
(5) professional development information; and
(6) a record of disciplinary action taken against the educator. All information contained in an individual's CACTUS file is available to the individual, but is classified private or protected under Section 63G-2-302 or 305 and is accessible only to specific designated individuals.

D. "Field trip" means a district, or school authorized excursion for educational purposes.

E. "LEA" means a local education agency, including local school boards/public school districts, charter schools, and, for purposes of this rule, the Utah Schools for the Deaf and the Blind.

F. "Teaching supplies and materials" means both consumable and nonconsumable items that are used for educational purposes by teachers in classroom activities and may include such items as:

(1) paper, pencils, workbooks, notebooks, supplementary books and resources;

(2) laboratory supplies, e.g. photography materials, chemicals, paints, bulbs (both light and flower), thread, needles,

bobbins, wood, glue, sandpaper, nails and automobile parts;

(3) laminating supplies, chart paper, art supplies, and mounting or framing materials;

(4) The definition of teaching supplies and materials should be broadly construed in so far as the materials are used by the teacher for instructional purposes or to protect the health of teachers in instructional or lab settings, or in conjunction with field trips.

G. "USOE" means the Utah State Office of Education.

**R277-459-3. Distribution of Funds.**

A. The Board may distribute funds to LEAs based on data submitted to the CACTUS database.

B. LEAs shall distribute funds for classroom supplies consistent with the amounts for salary schedule steps and teaching assignments as appropriated.

C. Individual teachers shall designate the uses for their allocations consistent with the criteria of this rule. LEAs and other eligible schools may develop policies, procedures and timelines to facilitate the intent of the appropriation.

D. Each LEA shall ensure that each eligible individual has the opportunity to receive the proportionate share of the appropriation. If the appropriation is not sufficient to provide each teacher the full amount allowed by law, teachers on salary steps one through three shall receive the full amount allowed with the remaining money apportioned to all other teachers.

E. If a teacher has not spent or committed to spend the individual allocation by April 1, the school or LEA may make the excess funds available to other teachers or may reserve the money for use by eligible teachers the following year.

F. These funds shall supplement, not supplant, existing funds for identified purposes.

G. These funds shall be accounted for by the LEA or eligible school using state and school district procurement and accounting policies.

H. The funds and supplies purchased with the funds are the property of the LEA.

(1) Employees do not personally own materials purchased with designated public funds.

(2) An LEA may by policy allow individual teachers to use supply funds to protect teacher health with consumable materials that may not be able to be reused by the school.

**R277-459-4. Other Provisions.**

A. LEAs shall allow, but not require, teachers to jointly use their allocations.

B. LEAs may carry over these funds, if necessary.

**KEY: teachers, supplies**
**Date of Enactment or Last Substantive Amendment: 2015**
**Notice of Continuation: 2015**
**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-1-402(1)(b)**

**R277. Education, Administration.**
**R277-474. School Instruction and Human Sexuality.**
**R277-474-1. Authority and Purpose.**

A. This rule is authorized by Utah Constitution, Article X, Section 3 which vests general control and supervision of public education in the Board, Section 53A-13-101(1)(c)(ii)(B) which directs the Board to develop a rule to allow local boards to adopt human sexuality education materials or programs under Board rules and Section 53A-1-401(3) which allows the Board to adopt rules in accordance with its responsibilities.

B. The purposes of this rule are:

(1) to provide requirements for the Board, LEAs and individual educators to select instructional materials about human sexuality and maturation;

(2) to provide notice to parents/guardians of proposed human sexuality and maturation discussions and instruction; and

(3) to provide direction to public education employees regarding instruction and discussion of maturation and human sexuality with students.

**R277-474-2. Definitions.**

A. “Board” means the Utah State Board of Education.

B. “Curriculum materials review committee (committee)” means a committee formed at the district or school level, as determined by the local board of education or local charter board, that includes parents, health professionals, school health educators, and administrators, with at least as many parents as school employees. The membership of the committee shall be appointed and reviewed annually by August 1 of each year by the local board, shall meet on a regular basis as determined by the membership, shall select its own officers and shall be subject to Sections 52-4-1 through 52-4-10.

C. “Family Educational Rights and Privacy Act” is a state statute, Sections 53A-13-301 and 53A-13-302, that protects the privacy of students, their parents, and their families, and supports parental involvement in the public education of their children.

D. “Human sexuality instruction or instructional programs” means any course, unit, class, activity or presentation that provides instruction or information to students about sexual abstinence, human reproduction, reproductive anatomy, physiology, pregnancy, marriage, childbirth, parenthood, contraception, or HIV/AIDS and other sexually transmitted diseases. While these topics are most likely discussed in such courses as health education, health occupations, human biology, physiology, parenting, adult roles, psychology, sociology, child development, and biology, this rule applies to any course or class in which these topics are the focus of discussion.

E. “Instructional Materials Commission” means an advisory commission authorized under Section 53A-14-101.

F. “LEA” means a local education agency, including local school boards/public school districts, charter schools, and, for purposes of this rule, the Utah Schools for the Deaf and the Blind.

G. “Maturation education” means instruction and materials used

to provide fifth or sixth grade students with age appropriate, accurate information regarding the physical and emotional changes associated with puberty, to assist in protecting students from abuse and to promote hygiene and good health practices.

H. “Medically accurate” means verified or supported by a body of research conducted in compliance with scientific methods and published in journals that have received peer-review, where appropriate, and recognized as accurate and objective by professional organizations and agencies with expertise in the relevant field, such as the American Medical Association.

I. “Parental notification form” means a form developed by the USOE and used exclusively by LEAs or Utah public schools for parental notification of subject matter identified in this rule. Students may not participate in human sexuality instruction, maturation education, or instructional programs as identified in R277-474-2D without prior affirmative parent/guardian response on file. The form:

(1) shall explain a parent's right to review proposed curriculum materials in a timely manner;

(2) shall request the parent's permission to instruct the parent's student in identified course material related to human sexuality or maturation education;

(3) shall allow the parent to exempt the parent's student from attendance for class period(s) while identified course material related to human sexuality or maturation education is presented and discussed;

(4) shall be specific enough to give parents fair notice of topics to be covered;

(5) shall include a brief explanation of the topics and materials to be presented and provide a time, place and contact person for review of the identified curricular materials;

(6) shall be on file with affirmative parent/guardian response for each student prior to the student's participation in discussion of issues protected under Section 53A-13-101; and

(7) shall be maintained at the school for a reasonable period of time.

J. “Professional development” means training in which Utah educators may participate to renew a license, receive information or training in a specific subject area, teach in another subject area or teach at another grade level.

K. “Utah educator” means an individual such as an administrator, teacher, counselor, teacher's assistant, or coach, who is employed by a unit of the Utah public education system and who provides teaching or counseling to students.

L. “Utah Professional Practices Advisory Commission (UPPAC)” means a Commission authorized under 53A-6-301 and designated to review allegations against educators and recommend action against educators' licenses to the Board.

M. “USOE” means the Utah State Office of Education.

**R277-474-3. General Provisions.**

A. The following may not be taught in Utah public schools through the use of instructional materials, direct instruction, or online instruction:

(1) the intricacies of intercourse, sexual stimulation or erotic behavior;

(2) the advocacy of homosexuality;

(3) the advocacy or encouragement of the use of contraceptive methods or devices; or

(4) the advocacy of sexual activity outside of marriage.

B. Educators are responsible to teach the values and information identified under Section 53A-13-101(4).

C. Utah educators shall follow all provisions of state law including parent/guardian notification and prior written parental consent requirements under Sections 76-7-322 and 76-7-323 in teaching any aspect of human sexuality.

D. Course materials and instruction shall be free from religious, racial, ethnic, and gender bias.

**R277-474-4. State Board of Education Responsibilities.**

The Board shall:

A. develop and provide professional development and assistance with training for educators on law and rules specific to human sexuality instruction and related issues.

B. develop and provide a parental notification form and timelines for use by LEAs.

C. establish a review process for human sexuality instructional materials and programs using the Instructional Materials Commission and requiring final Board approval of the Instructional Materials Commission's recommendations.

D. approve only medically accurate human sexuality instruction programs.

E. receive and track parent and community complaints and comments received from LEAs related to human sexuality instructional materials and programs.

**R277-474-5. LEA Responsibilities.**

A. Annually each LEA shall require all newly hired or newly assigned Utah educators with responsibility for any aspect of human sexuality instruction to attend state-sponsored professional development outlining the human sexuality curriculum and the criteria for human sexuality instruction in any courses offered in the public education system.

B. Each LEA shall provide training consistent with R277-474-5A at least once during every three years of employment for Utah educators.

C. Local school boards and local charter boards shall form curriculum materials review committees (committee) at the district or school level as follows:

(1) The committee shall be organized consistent with R277-474-2B.

(2) Each committee shall designate a chair and procedures.

(3) The committee shall review and approve all guest speakers and guest presenters and their respective materials relating to human sexuality instruction in any course and maturation education prior to their presentations.

(4) The committee shall not authorize the use of any human sexuality instructional program or maturation education program not

previously approved by the Board, approved consistent with R277-474-6, or approved under Section 53A-13-101(1)(c)(ii).

(5) The district superintendent or charter school administrator shall report educators who willfully violate the provisions of this rule to the Commission for investigation and possible discipline.

(6) The LEA shall use the common parental notification form or a form that satisfies all criteria of the law and Board rules, and comply with timelines approved by the Board.

(7) Each LEA shall develop a logging and tracking system of parental and community complaints and comments resulting from student participation in human sexuality instruction, to include the disposition of the complaints, and provide that information to the USOE upon request.

D. If a student is exempted from course material required by the Board-approved Core Standards consistent with Sections 53A-13-101.2(1), (2) and (3), the school shall:

(1) waive the participation requirement; or

(2) provide a reasonable alternative to the requirement.

**R277-474-6. Local Board or Local Charter Board Adoption of Human Sexuality Education and Maturation Education Instructional Materials.**

A. A local board may adopt instructional materials under Section 53A-13-101(1)(c)(iii).

B. Materials that are adopted shall comply with the criteria of Section 53A-13-101(1)(c)(iii) and:

(1) shall be medically accurate as defined in R277-474-2H.

(2) shall be approved by a majority vote of the local board members or local charter board members present at a public meeting of the board.

(3) shall be available for reasonable review opportunities to residents of the district or parents/guardians of charter school students prior to consideration for adoption.

C. The LEA shall comply with the reporting requirement of Section 53A-13-101(1)(c)(iii)(D). The report to the Board shall include:

(1) a copy of the human sexuality instructional materials and maturation education materials not approved by the Instructional Materials Commission that the local board or local charter board seeks to adopt;

(2) documentation of the materials’ adoption in a public board meeting;

(3) documentation that the materials or program meets the medically accurate criteria of R277-474-2H;

(4) documentation of the recommendation of the materials by the committee; and

(5) a statement of the local board’s or local charter board’s rationale for selecting materials not approved by the Instructional Materials Commission.

D. The local board’s or local charter board’s adoption process for human sexuality instructional materials and maturation education materials shall include a process for annual review of the board’s decision.

**R277-474-7. Utah Educator Responsibilities.**

A. Utah educators shall participate in training provided under R277-474-5A.

B. Utah educators shall use the common parental notification form or a form approved by their employing LEA, and timelines approved by the Board.

C. Utah educators shall individually record parent and community complaints, comments, and the educators' responses regarding human sexuality instructional programs.

D. Utah educators may respond to spontaneous student questions for the purposes of providing accurate data or correcting inaccurate or misleading information or comments made by students in class regarding human sexuality.

**KEY: schools, sex education**
**Date of Enactment or Last Substantive Amendment: 2015**
**Notice of Continuation: 2015**
**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-13-101(1)(c)(ii)(B); 53A-1-401(3)]**

**R277. Education, Administration.**
**R277-475. Patriotic, Civic and Character Education.**
**R277-475-1. Authority and Purpose.**

A. This rule is authorized by Utah Constitution Article X, Section 3 which vests general control and supervision of the public school system under the Board, by Section 53A-13-101.6 which directs the Board to provide a rule for a program of instruction within the public schools relating to the flag of the United States, and by Section 53A-1-401(3) which allows the Board to adopt rules in accordance with its responsibilities.

B. The purpose of this rule is to provide direction for patriotic education programs in the public schools.

**R277-475-2. Definitions.**

A. “Board” means the Utah State Board of Education.

B. “Character education” means reaffirming values and qualities of character which promote an upright and desirable citizenry.

C. “Civic education” means the cultivation of informed, responsible participation in political life by competent citizens committed to the fundamental values and principles of representative democracy in Utah and the United States.

D. “LEA” means a local education agency, including local school boards/public school districts, charter schools, and, for purposes of this rule, the Utah Schools for the Deaf and the Blind.

E. “Patriotic” means having love of and dedication to one's country.

F. “Patriotic education” means the educational and systematic process to help students identify, acquire, and act upon a dedication to one's country.

**R277-475-3. Patriotic Education.**

An LEA shall teach patriotic education in the social studies curricula of kindergarten through grade twelve. All educators shall have responsibility for patriotic, civic and character education taught in an integrated school curriculum and in the regular course of school work.

**R277-475-4. School Responsibilities and Required Instruction.**

A. Patriotic, civic and character education programs shall meet the requirements of Sections 53A-13-101.4, 53A-13-101.6, and 53A-13-109.

B. An LEA shall teach students the history of the flag, etiquette, customs pertaining to the display and use of the flag, and other patriotic exercises consistent with Section 53A-13-101.6(2).

C. The school shall provide the setting and opportunities to teach by example and role modeling patriotic values associated with the flag of the United States.

D. The USOE shall, under the direction of the Board, provide guidelines for both elementary age students and secondary students about the flag and patriotic exercises.

E. Instruction in United States history and government shall include:

(1) a study of forms of government including:
(a) a republic;
(b) a pure democracy;
(c) a monarchy; and
(d) an oligarchy.
(2) political philosophies and economic systems including:
(a) socialism;
(b) individualism; and
(c) free market capitalism.
(3) the United States' form of government, a compound constitutional republic.

**R277-475-5. Requirements.**

A. Education about the flag and the Pledge of Allegiance to the Flag shall be taught and modeled following the plan of the social studies Core Curriculum in grades kindergarten through six.

B. The Pledge of Allegiance to the Flag shall be recited by students at the beginning of each school day in each public school classroom in the state, consistent with Section 53A-13-101.6(3).

C. At least once a year students shall be instructed that:

(1) participation in the Pledge of Allegiance is voluntary and not compulsory;

(2) it is acceptable for an individual to choose not to participate in the Pledge of Allegiance for religious or other reasons; and

(3) students should show respect for individuals who participate and individuals who choose not to participate.

D. A public school teacher shall strive to maintain an atmosphere among students in the classroom that is consistent with the principles described in R277-475-5C.

**R277-475-6. Parental Responsibilities.**

A. An LEA shall adequately notify students and parents of lawful exemptions to the requirement to participate in reciting the Pledge.

B. A school may require an annual written request from a student's parent or legal guardian if a student or the student's parent or legal guardian requests that the student be excused from reciting the Pledge.

**R277-475-7. Civic Engagement.**

A. A public school shall display IN GOD WE TRUST, the national motto of the United States, in one or more prominent places in each school building, consistent with Section 53A-13-101.4(6).

B. Civic and character education shall be achieved through an integrated school curriculum and in the regular course of school work.

C. Instruction in United States history and government shall be taught consistent with the Utah social studies core curriculum and Section 53A-13-101.4.

D. An LEA shall make information about the flag, respect for the flag and civility toward all during patriotic activities available on the LEA's website.

**R277-475-8. Reporting Requirements.**

A. The Board shall submit a report to the Education Interim Committee consistent with Section 53A-13-109(7).

B. Each school district and the State Charter School Board shall submit a report to the Lieutenant Governor and the Commission on Civic and Character Education consistent with Section 53A-13-109(6).

**KEY: curricula, patriotic education, civic education, character education**
**Date of Enactment or Last Substantive Amendment: 2015**
**Notice of Continuation: 2015**
**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-13-101.6; 53A-1-401(3)**

**R277. Education, Administration.**
**R277-516. Education Employee Required Reports of Arrests and Required Background Check Policies for Non-licensed Employees.**
**R277-516-3. Licensed Public Education Employee Personal Reporting of Arrests.**

A. A licensed educator who is arrested, cited or charged with the following alleged offenses shall report the arrest, citation, or charge within 48 hours or as soon as possible to the licensed educator's district superintendent, charter school director or designee:

(1) any matters involving an alleged sex offense;

(2) any matters involving an alleged drug-related offense;

(3) any matters involving an alleged alcohol-related offense;

(4) any matters involving an alleged offense against the person under Title 76, Chapter 5, Offenses Against the Person;

(5) any matters involving an alleged felony offense under Title 76, Chapter 6, Offenses Against Property;

(6) any matters involving an alleged crime of domestic violence under Title 77, Chapter 36, Cohabitant Abuse Procedures Act; and

(7) any matters involving an alleged crime under federal law or the laws of another state comparable to the violations listed in R277-516-3A(1)-(6).

B. A licensed educator shall report convictions, including pleas in abeyance and diversion agreements within 48 hours or as soon as possible upon receipt of notice of the conviction, plea in abeyance or diversion agreement.

C. The district superintendent, charter school director or designee shall report conviction, arrest or offense information received from licensed educators to the USOE within 48 hours of receipt of information from licensed educators. The USOE shall develop an electronic reporting process on the USOE website.

D. The licensed educator shall report for work following the arrest and notice to the employer unless directed not to report for work by the employer, consistent with school district or charter school policy.

**KEY: school employees, self reporting**
**Date of Enactment or Last Substantive Amendments: 2015**
**Notice of Continuation: June 10, 2014**
**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-1-301(3)(a); 53A-1-301(3)(d)(x); 53A-1-402(1)(a)(i); 53A-1-402(1)(a)(iii)**

**R277. Education, Administration.**
**R277-517. Board and UPPAC Disciplinary Definitions and Actions.**
**R277-517-5. Board Disciplinary Actions.**

A. Board disciplinary actions:

(1) The Board may suspend an educator's license consistent with R277-517-1G:

(a) A suspension may be recommended by a Stipulated Agreement negotiated between UPPAC and an educator; or

(b) A suspension may be recommended following an administrative hearing under the provisions of R686-100;

(c) A suspension may include specific conditions which shall be satisfied by the educator prior to requesting a reinstatement hearing from UPPAC under R686-100;

(d) A suspension shall provide a minimum time period after which the educator may request a reinstatement hearing from UPPAC.

(2) The Board may revoke an educator's license:

(a) A revocation is permanent, except as provided under R277-517-5A(2)(c) below;

(b) A revocation is required under Section 53A-6-405(2);

(c) An individual whose license has been revoked may seek reinstatement of his license only in the following limited circumstances:

(i) the individual provides evidence of mistake or false information that was critical to the revocation action;

(ii) the individual identifies material procedural UPPAC or Board error in the revocation process.

(3) If a complaint is filed against an educator and the educator fails to respond to the complaint or fails to appear for a hearing before the Board or UPPAC, the Board may revoke or suspend the educator’s license. This action may be taken only if UPPAC has documentation of attempts to contact the educator, consistent with 686-100.

(4) The Board may reinstate an educator's license:

(a) An educator may request a reinstatement hearing following a license suspension. The reinstatement request shall be made consistent with R686-100.

(b) An educator has a reasonable expectation of a reinstatement hearing, consistent with due process and reinstatement hearing conditions set by UPPAC, but no expectation of license reinstatement by the Board.

(c) An educator whose license has been suspended and the reinstatement denied by the Board may request an additional reinstatement hearing once every 24 months unless otherwise directed by the Board.

(d) An educator requesting a reinstatement hearing shall have a criminal background check, that was conducted not more than six months prior to the requested hearing, on file with the USOE. The background check and review of any offenses must be completed prior to reinstatement.

(e) Prior to sending a reinstatement recommendation to the

Board for its consideration, UPPAC shall provide evidence to the Board of its consideration of Board-identified criteria central to the Board's authority to reinstate an educator's license.

D. The Board has sole discretion in final administrative decisions.

E. The Board shall send written notice to an educator of Board action no more than 30 days following the Board's final action.

F. The Board shall send written notice of an educator’s license suspension or revocation to an educator’s former employer if the employer was a public or private school.

**KEY: educator, professional, standards**
**Date of Enactment or Last Substantive Amendments: 2015**
**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-1-402(1)(a); 53A-6; 53A-1-401(3)**

**R277. Education, Administration.**
**R277-700. The Elementary and Secondary School Core Curriculum.**
**R277-700-6. High School Requirements.**

A. The Board shall establish Core Standards and a Core Curriculum for students in grades 9-12.

B. Students in grades 9-12 shall earn a minimum of 24 units of credit through course completion or through competency assessment consistent with R277-705 to graduate.

C. Grades 9-12 Core Curriculum credits from courses approved by the Board, as specified:

(1) Language Arts (4.0 units of credit):

(a) Ninth grade level (1.0 unit of credit);

(b) Tenth grade level (1.0 unit of credit);

(c) Eleventh grade level (1.0 unit of credit); and

(d) Twelfth grade level (1.0) Unit of credit) consisting of applied or advanced language arts credit from the list of Board-approved courses using the following criteria and consistent with the student’s SEOP/Plan for College and Career Readiness:

(i) courses are within the field/discipline of language arts with a significant portion of instruction aligned to language arts content, principles, knowledge, and skills; and

(ii) courses provide instruction that leads to student understanding of the nature and disposition of language arts; and

(iii) courses apply the fundamental concepts and skills of language arts; and

(iv) courses provide developmentally appropriate content; and

(v) courses develop skills in reading, writing, listening, speaking, and presentation;

(2) Mathematics (3.0 units of credit) met minimally through successful completion of a combination of the foundation or foundation honors courses, Algebra 1, Geometry, Algebra 2, Secondary Mathematics I, Secondary Mathematics II, Secondary Mathematics III as determined in the student’s SEOP/Plan for College and Career Readiness. After the 2014-2015 school year Mathematics (3.0 units of credit) shall be met minimally through successful completion of a combination of the foundation or foundation honors courses Secondary Mathematics I, Secondary Mathematics II, and Secondary Mathematics III.

(a) Students may opt out of Algebra 2 or Secondary Mathematics III with written parent/legal guardian request. If an opt out is requested, the third math credit shall come from the advanced and applied courses on the Board-approved mathematics list.

(b) 7th and 8th grade students may earn credit for a mathematics foundation course before ninth grade, consistent with the student's SEOP/Plan for College and Career Readiness and if at least one of the following criteria is met:

(i) the student is identified as gifted in mathematics on at least two different USOE-approved assessments;

(ii) the student is dual enrolled at the middle school/junior high school and the high school;

(iii) the student qualifies for promotion one or two grade levels above the student’s age group and is placed in 9th grade;

(iv) the student takes the USOE competency test in the summer prior to 9th grade and earns high school graduation credit for the

courses.

(c) Other students who successfully complete a foundation course before ninth grade shall still earn 3.0 units of credit by taking the other foundation courses and an additional course from the advanced and applied Board-approved mathematics list consistent with the student's SEOP/Plan for College and Career Readiness and the following criteria:

(i) courses are within the field/discipline of mathematics with a significant portion of instruction aligned to mathematics content, principles, knowledge, and skills;

(ii) courses provide instruction that lead to student understanding of the nature and disposition of mathematics;

(iii) courses apply the fundamental concepts and skills of mathematics;

(iv) courses provide developmentally appropriate content; and

(v) courses include the five process skills of mathematics: problem solving, reasoning, communication, connections, and representation.

(c) Students who are gifted and students who are advanced may also:

(i) Take the honors courses at the appropriate grade level; and

(ii) Continue taking higher level mathematics courses in sequence through grade 11, resulting in a higher level of mathematics proficiency and increased college and career readiness.

(d) A student who successfully completes a Calculus course has completed mathematics graduation requirements, regardless of the number of mathematics credits earned.

(e) Students should consider taking additional credits during their senior year that align with their postsecondary career or college expectations. Students who desire a four year college degree in a science, technology, engineering or mathematics (STEM) career area should take a calculus course.

(3) Science (3.0 units of credit):

(a) at a minimum, two courses from the science foundation areas:

(i) Earth Systems Science (1.0 units of credit);

(ii) Biological Science (1.0 units of credit);

(iii) Chemistry (1.0 units of credit);

(iv) Physics (1.0 units of credit);

(v) Computer Science; and

(b) one additional unit of credit from the foundation courses or the applied or advanced science list determined by the LEA board and approved by the Board using the following criteria and consistent with the student’s SEOP/Plan for College and Career Readiness:

(i) courses are within the field/discipline of science with a significant portion of instruction aligned to science content, principles, knowledge, and skills; and

(ii) courses provide instruction that leads to student understanding of the nature and disposition of science; and

(iii) courses apply the fundamental concepts and skills of science; and

(iv) courses provide developmentally appropriate content; and

(v) courses include the areas of physical, natural, or applied sciences; and

(vi) courses develop students' skills in scientific inquiry.

(4) Social Studies (3.0 units of credit):

(a) Geography for Life (0.5 units of credit);

(b) World Civilizations (0.5 units of credit);

(c) U.S. History (1.0 units of credit);

(d) U.S. Government and Citizenship (0.5 units of credit);

(e) Social Studies (0.5 units of credit per LEA discretion).

(5) The Arts (1.5 units of credit from any of the following performance areas):

(a) Visual Arts;

(b) Music;

(c) Dance;

(d) Theatre;

(6) Physical and Health Education (2.0 units of credit):

(a) Health (0.5 units of credit);

(b) Participation Skills (0.5 units of credit);

(c) Fitness for Life (0.5 units of credit);

(d) Individualized Lifetime Activities (0.5 units of credit) or team sport/athletic participation (maximum of 0.5 units of credit with school approval).

(7) Career and Technical Education (1.0 units of credit):

(a) Agriculture;

(b) Business;

(c) Family and Consumer Sciences;

(d) Health Science and Technology;

(e) Information Technology;

(f) Marketing;

(g) Technology and Engineering Education;

(h) Trade and Technical Education.

(8) Educational Technology (0.5 units of credit):

(a) Computer Technology (0.5 units of credit from a Board-approved list of courses); or

(b) successful completion of Board-approved competency examination (credit may be awarded at the discretion of the LEA).

(9) Library Media Skills (integrated into the subject areas).

(10) General Financial Literacy (0.5 units of credit).

(11) Electives (5.5 units of credit).

D. Board-approved summative adaptive assessments shall be used to assess student mastery of the following subjects:

(1) reading;

(2) language arts through grade 11;

(3) mathematics as defined under R277-700-6C(2); and

(4) science as defined under R277-700-6C(3).

E. LEA boards may require students to earn credits for graduation that exceed minimum Board requirements.

F. Additional elective course offerings may be established and offered at the discretion of an LEA board.

G. Students with disabilities served by special education programs may have changes made to graduation requirements through individual IEPs to meet unique educational needs. A student's IEP shall document the nature and extent of modifications and substitutions or exemptions made to accommodate a student with

disabilities.

H. The Board and USOE may review LEA boards' lists of approved courses for compliance with this rule.

I. Graduation requirements may be modified for individual students to achieve an appropriate route to student success when such modifications:

(1) are consistent with the student's IEP or SEOP/Plan for College and Career Readiness or both;

(2) are maintained in the student's file and include the parent's/guardian's signature; and

(3) maintain the integrity and rigor expected for high school graduation, as determined by the Board.

**KEY: curricula**
**Date of Enactment or Last Substantive Amendment: 2015**
**Notice of Continuation: March 12, 2013**
**Authorizing, and Implemented or Interpreted Law: Art X Sec 3; 53A-1-402(1)(b); 53A-1-402.6; 53A-1-401(3)**

Utah STATE OFFICE of Education

*Leadership...Service...Accountability*

**REPORT TO THE UTAH STATE BOARD OF EDUCATION**

February 6, 2015

**REQUEST FOR TEMPORARY AUTHORIZATIONS AS SUBMITTED BY THE SCHOOL DISTRICTS/CHARTER SCHOOLS:**

Authorization Summary: Pages 1-2

1. Alpine District
2. Davis District
3. Jordan Distrct
4. Nebo District
5. Legacy Prep
6. Ogden Prep
7. Quest Academy
8. Walden

*250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Voice: (801) 538-7500 Fax: (801) 538-7769*
*Brad C. Smith, State Superintendent of Public Instruction*

Apr. 2015

## Letter of Authorization Requests
## Temporary License Summary Sheet

| Code | Category | Oct. Count | Nov. Count | Dec. Count | Jan. Count | Feb. Count | March Count | April Count | May Count | Year To Date |
|---|---|---|---|---|---|---|---|---|---|---|
| (P) | Pending University Paperwork Completion: | 0 | 108 | 8 | 0 | 7 | 1 | 1 | | 125 |
| (PATE) | Pending CTE | 1 | 0 | 0 | 0 | 0 | 1 | 0 | | 2 |
| (ARL) | Pending Alternative Routes to Licensing | 0 | 58 | 13 | 0 | 5 | 2 | 1 | | 79 |
| (POS) | Out of State Applicant Pending Paperwork Completion | 0 | 133 | 30 | 3 | 1 | 7 | 0 | | 174 |
| (E) | Eminence - Eminently Qualified | 1 | 151 | 9 | 2 | 0 | 3 | 2 | | 168 |
| (ER) | Expired License Needs to Renew with Coursework | 0 | 46 | 1 | 0 | 0 | 3 | 0 | | 50 |
| (ERP) | Expired License Pending Paperwork Completion | 0 | 28 | 2 | 0 | 0 | 0 | 0 | | 30 |
| (ERU) | Expired License Unqualified for Assignment | 0 | 17 | 5 | 1 | 0 | 0 | 0 | | 23 |
| (UE) | Underqualified - Enrolled in Appropriate Program | 1 | 398 | 36 | 0 | 5 | 6 | 5 | | 451 |
| (U) | Underqualified - Not Enrolled in Program | 0 | 354 | 83 | 5 | 3 | 4 | 9 | | 458 |
| (U/NESS) | Underqualified - Restricted Necessarily Existing Small School | 0 | 3 | 5 | 0 | 0 | 0 | 0 | | 8 |
| | **Total:** 1 District, 1 Charter, 1 Private; 29 District, 50 Charter, 4 Private; 19 District, 13 Charter, 6 Private, 4 District, 2 Charter; 4 District, 3 Charter, 1 Private; 5 District, 3 Charter, 1 Private; 3 District, 4 Charter | **3** | **1296** | **192** | **11** | **21** | **27** | **18** | | **1568** |

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| SAEP | Licensed educators with assignments outside of their endorsement area. They need to be on a State Approved Endorsement Plan with a USOE specialist. | 5 | 412 | 202 | 0 | 1 | 1 | 1 | | **622** |

04/20/2015 **Authorizations Requested**

**DISTRICT REQUESTS FOR AUTHORIZATION:**

| DISTRICT | ENDORSEMENTS HELD | LICENSE AREAS HELD | ASSIGNMENTS FOR WHICH ENDORSEMENTS ARE NEEDED: | |
|---|---|---|---|---|
| **ALPINE DISTRICT** | | | | |
| **LEHI HIGH** | | | | |
| BROOKLYN HUTTO | | | Photography | 100% of FTE |
| | | | FY15 Eminence; eminently qualified | |
| **SAGE HILLS SCHOOL** | | | | |
| LORRAIN HUGGANS | | | Music (K-6) | 100% of FTE |
| | | | FY15 Eminence; eminently qualified | |
| **DAVIS DISTRICT** | | | | |
| **BUFFALO POINT SCHOOL** | | | | |
| JENNIFER PAYNE | | Early Childhood Educatio | Grade 3 Spanish D.I. Lang Teacher | 100% of FTE |
| | | Elementary Education (K- | FY15 Underqualified; enrolled in a program (specify | |
| **CENTENNIAL JR HIGH** | | | | |
| MADISON BRADFORD | Visual Art (K-12) | Secondary Education (6-1 | Art Foundations I | 100% of FTE |
| | | | FY15 Pending university paperwork | |
| **FAIRFIELD JR HIGH** | | | | |
| LAURA GUILLAUME | | | Applied Skills | 100% of FTE |
| | | | FY15 Underqualified; enrolled in a program (specify | |
| **MEADOWBROOK SCHOOL** | | | | |
| LAURA HUGHES | | | Severe Disabilities - Elementary | 100% of FTE |
| | | | FY15 Underqualified; not enrolled in a program | |
| **STAR TRANSITION** | | | | |
| JENNIE MCKAY | | | Applied Skills | 100% of FTE |
| | | | FY15 Underqualified; enrolled in a program (specify | |
| **JORDAN DISTRICT** | | | | |
| **COPPER MOUNTAIN MIDDLE** | | | | |
| NICHOLAS HALE | | | Counselor (7-12) | 100% of FTE |
| | | | FY15 Underqualified; enrolled in a program (specify | |
| **LEGACY PREPARATORY ACADEMY** | | | | |
| **LEGACY PREPARATORY ACADEMY** | | | | |
| KASIE BARKER | | Title I Paraprofessional | Kindergarten | 100% of FTE |
| | | | FY15 Alternative Routes to Licensure | |
| **OGDEN PREPARATORY ACADEMY** | | | | |
| **OGDEN PREPARATORY ACADEMY** | | | | |
| KYLE CLUFF | | | Beg Fitness, Team Sport Skills & Dan | 33% of FTE |
| | | | FY15 Underqualified; not enrolled in a program | |
| | | | Health Education I | 50% of FTE |
| | | | FY15 Underqualified; not enrolled in a program | |
| **QUEST ACADEMY** | | | | |
| **QUEST ACADEMY** | | | | |
| SARALINDSEY SMITH | | | Grade 2 | 100% of FTE |
| | | | FY15 Underqualified; enrolled in a program (specify | |
| **WALDEN SCHOOL OF LIBERAL ARTS** | | | | |
| **WALDEN SCHOOL OF LIBERAL ARTS** | | | | |
| CORINNE BAUER | | | Journalism | 33% of FTE |
| | | | FY15 Underqualified; not enrolled in a program | |
| | | | Secondary Reading (6-8) | 33% of FTE |
| | | | FY15 Underqualified; not enrolled in a program | |

**DISTRICT REQUESTS FOR AUTHORIZATION:**

| DISTRICT | ENDORSEMENTS HELD | LICENSE AREAS HELD | ASSIGNMENTS FOR WHICH ENDORSEMENTS ARE NEEDED: | |
|---|---|---|---|---|
| **WALDEN SCHOOL OF LIBERAL ARTS** | | | | |
| **WALDEN SCHOOL OF LIBERAL ARTS** | | | | |
| ELIZA CAMPBELL | | | Foreign Language Exploratory | 100% of FTE |
| | | | FY15 Underqualified; not enrolled in a program | |
| JESSICA MASS | | | Career Orientation and Exploration (V | 100% of FTE |
| | | | FY15 Underqualified; not enrolled in a program | |
| MATTHEW OLSON | | | Geology | 50% of FTE |
| | | | FY15 Underqualified; not enrolled in a program | |
| | | | Guitar/Piano | 50% of FTE |
| | | | FY15 Underqualified; not enrolled in a program | |

**DISTRICT REQUESTS FOR AUTHORIZATION:**

| DISTRICT | ENDORSEMENTS HELD | LICENSE AREAS HELD | ASSIGNMENTS FOR WHICH ENDORSEMENTS ARE NEEDED: | |
|---|---|---|---|---|
| NORTH STAR ACADEMY | | | | |
| NORTH STAR ACADEMY | | | | |
| KRISTEN DEFOREST | Physical Education (Grades I | Elementary Education (1-I | Health Education I | 20% of FTE |
| | Speech | Secondary Education (6-1 | FY15 Underqualified; not enrolled in a program | |

04/06/2015

# Utah State Office of Education
# Monthly Board Report

## TOTAL NUMBER OF EDUCATOR LICENSES AND LICENSE AREAS PROCESSED BETWEEN 3/1/2015 and 3/31/2015

| Licenses Processed | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| **License Level** | **Expired** | **Incomplete Renewed** | **New** | **Pending Payment** | **Renewed** | **Revoked** | **Student** | **Suspended** | **Grand Total** |
| 1 | | | 156 | | 62 | | | | **218** |
| 2 | | | 157 | | 590 | | | | **747** |
| 3 | | | 2 | | 13 | | | | **15** |
| Level 1 LEA-Specific | | | 3 | | 2 | | | | **5** |
| Alt. Route to Licensure | | | 92 | | | | | | **92** |
| Certified Paraprofessional | | | 84 | | | | | | **84** |
| 1 - Returning | | | 5 | | 1 | | | | **6** |
| Student | | | | | | | 126 | | **126** |
| Temporary | | | 27 | | | | | | **27** |
| University Recommend | | | | 6 | | | | | **6** |
| Intl. Guest Teacher | | | 1 | | | | | | **1** |
| **Grand Total** | **0** | **0** | **527** | **6** | **668** | **0** | **126** | **0** | **1327** |

04/06/2015

# Utah State Office of Education
# Monthly Board Report

## TOTAL NUMBER OF EDUCATOR LICENSES AND LICENSE AREAS PROCESSED BETWEEN 3/1/2015 and 3/31/2015

| License Areas Processed | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| *USOE Qualified by Code* / License Area | *?* | *A* | *B* | *C* | *D* | *E* | *F* | *G* | *I* | *K* | *L* | *M* | *N* | *P* | *Q* | *R* | *S* | *T* | *U* | *V* | *X* | *Y* | Total |
| Early Childhood Education (K-3) | | 1 | | | | | | | | | | 2 | | | | | | | 2 | | | | 5 |
| Elementary Education (K-6) | | | | | | | | | | | 3 | 22 | | | | | | | 12 | | | | 37 |
| Elementary Education (1-8) | | 6 | | | | | 1 | | | | 37 | 28 | | | | | | 1 | 5 | | | | 78 |
| Secondary Education (6-12) | | 9 | | | | | 1 | | | | 69 | 8 | | | | 3 | | | 37 | | | | 127 |
| School Counselor (K-12) | | 1 | | | | | | | | | | 4 | | | | | | | 2 | | | | 7 |
| School Psychologist (K-12) | | 2 | | | | | | | | | | | | | | | | | | | | | 2 |
| Title I Paraprofessional | | | | | | 39 | | | | | | | | | | | 38 | | | | | 15 | 92 |
| Administrative/Supervisory (K-12) | | 1 | | | | | | | | | | | | | | | | | 15 | | | | 16 |
| Special Education (K-12+) | | 4 | | | | | | | | | 5 | 10 | | | | 1 | | 1 | 15 | | | | 36 |
| Speech - Language Technician | | 1 | | | | | | | | | 2 | | | | | | | | | | | | 3 |
| Preschool Special Education (Birth - age 5) | | 1 | | | | | | | | | | 3 | | | | | | | | | | | 4 |
| Speech - Language Pathologist | | 2 | | | | | | | | | | | | | | | | | | | | | 2 |
| **Grand Total** | **0** | **28** | **0** | **0** | **0** | **39** | **2** | **0** | **0** | **0** | **116** | **77** | **0** | **0** | **0** | **4** | **38** | **2** | **88** | **0** | **0** | **15** | **409** |

**Qualified By Codes:**

? Not Known
A Authorization
B Portfolio
C Demonstrated Competency
D Major Equivalent
E Exam
F Foreign Credentials
G Local Acad Assessment
I Troops to Teachers
K Alt Route University
L Alt Route to Licensure
M Major
N Minor
P Special Program
Q Certificate Program
R Restricted
S Associate Degree
T Alt Preparation
U University Program
V Transition to Teaching
W SUSPENDED
X Experience
Y Two Years College
Z Exemption

UTAH STATE BOARD OF EDUCATION

David L. Crandall, Chair
David L. Thomas, First Vice Chair
Jennifer A. Johnson, Second Vice Chair

Dixie L. Allen
Laura Belnap
Leslie B. Castle
Barbara W. Corry
Brittney Cummins
Linda B. Hansen
Mark Huntsman
Jefferson Moss
C. Mark Openshaw
Spencer F. Stokes
Terryl Warner
Joel Wright

Brad C. Smith, Chief Executive Officer
Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 9-10, 2015

**INFORMATION:** Utah Schools for the Deaf and the Blind (USDB) Quarterly Report

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**Background:**
USDB provides special education and related services to Utah students with sensory impairments under the direction of the State Board of Education, and is advised by the USDB Advisory Council. The USDB Superintendent or designee will report on activities and concerns quarterly.

**Key Points:**
The USDB Superintendent or designee will provide the Standards and Assessment Committee with an update on the Advisory Council membership and activities, current Memorandums of Understanding (MOUs) impacting services to USDB students, the USDB budget, and a review of 2015 Utah legislation that impacts USDB.

**Anticipated Action:**
The Board will receive the information provided and request additional information as needed.

**Contact:** Glenna Gallo, 801-538-7757

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USDB Quarterly Report
April 10, 2015

1. Advisory Council Membership and Activities (Attached)
    a. Member Roster
    b. Member Term Document
    c. Current AC Bylaws
    d. UT Code 53A-25b-201

2. Current MOUs impacting services to USDB students (found on website or links below)
    **a. University of Utah**
    https://d3n8a8pro7vhmx.cloudfront.net/usdb/pages/42/attachments/original/1422635757/UofU_MOU_(1).pdf?1422635757
    **b. DSBVI**
    https://d3n8a8pro7vhmx.cloudfront.net/usdb/pages/42/attachments/original/1422635678/DSBVI_MOU.pdf?1422635678
    **c. Utah State University**
    https://d3n8a8pro7vhmx.cloudfront.net/usdb/pages/42/attachments/original/1422637324/USU_MOU_2014-2015.pdf?1422637324

3. USDB Budget
    The quarterly budget for USDB will be reviewed by the finance committee in May.

4. Review of 2015 Legislation impacting USDB
    a. HB 172 - Payroll Service Amendments (Spendlove) - (-$15,000.00 from Base Budget)
    b. SB 001-Base Budget (Item 14)-$30,723,900
        i. $23,707,200 from Education Funds
        ii. $94,500 Federal Funds
        iii. $1,138,600 Dedicated Credits (Estimated)
        iv. $3,934,500 Revenue Transfers (Estimated)
        v. $1,250,000 Revenue Transfers-Medicaid Specific (Estimated)
        vi. $599,100 FY 15 Carry Forward (Estimated)
    c. HB 002-Public Education Budget Amendments (Item 12)-$1,852,000
        i. $1,200,000 from Education Funds (on going)
            1. $300,000 for additional FTEs
            2. $484,000 provided back to base budget from 2% exercise
            3. $240,000 additional USIMAC positions
            4. $131,000 Steps and Lanes (includes 0.4334%) adjustment
            5. $45,000 Salt Lake Campus (O&M)
        ii. $652,000 from Education Funds (one time)
            1. $350,000 USIMAC Braille Embossers
            2. $347,000 Modular Classrooms (Orem)

3. -$45,000 adjustment for Salt Lake Campus O&M-building will not be operational in FY 16-Goes operational in FY 17 so O&M will begin

iii. HB 008-State Agency and Higher Education Compensation (Item 169)-$522,100

1. This bill:
2. ▸ provides funding for a 2.25% general salary increase for state employees;
3. ▸ provides funding equivalent to a 0.75% cost of living allowance for targeted market comparability adjustments to certain state agency employees; possibly to Financial Analysts in USDB
4. ▸ provides funding for a 4.9% increase in health insurance benefits rates for state and higher education employees;
5. ▸ provides funding for reductions in unemployment rates for state employees;
6. ▸ provides funding for retirement rate changes for certain state employees;
7. ▸ provides appropriations for an up-to $26 per pay period match for qualifying state employees enrolled in a defined contribution plan; and
8. ▸ provides appropriations for rate impacts associated with compensation of internal service fund employees.
9. From Education Fund
   416,100

| | |
|---|---|
| From Education Fund, One-time | 87,700 |
| From Federal Funds | 2,600 |
| From Dedicated Credits Revenue | 15,700 |
| **Schedule of Programs:** | |
| Instructional Services | 263,900 |
| Support Services | 258,200 |

# UTAH SCHOOLS FOR THE DEAF AND THE BLIND
# ADVISORY COUNCIL

**Revised January 2015**


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# ADVISORY COUNCIL MEMBERS BY DESIGNATION & TERMS

Revised July 1, 2014

| | Member | Designation | Joined Council | Term | Term Ends |
|---|---|---|---|---|---|
| 1 | Tony Jepson, Chair | Blind Adult | Sept. 2011 | 1 Year<br>2 Year<br>1 Year | June 2012<br>June 2014<br>June 2015 |
| 2 | Sandra Ruconich | Blind Adult | July 2012 | (1st) 2 Year<br>(2nd)2 Year | June 2014<br>July 2014<br>June 2016 |
| 3 | Donald Liveley | Hard of Hearing Adult | July 2014 | First 1 Year | June 2015 |
| 4 | Dan Mathis | Deaf Adult | October 2013 | 9 mo finished<br>Jeff Pollock<br>2 Year | June 2014<br><br>July 2014<br>June 2016 |
| 5 | Jennifer Chapman Lloyd | Parent of a Deafblind Child | July 2012 | First 2 Year<br>(2nd) 2 Year | June 2014<br>July 2014<br>June 2016 |
| 6 | Melanie Hooten | Parent of a Deafblind Child | July 2014 | First 1 Year | July 2014<br>June 2015 |
| 7 | Chris Bischke, Vice Chair | Interested or Knowledgeable Individual | April 2013<br><br>July 2014 | 15 mo finished<br>Marty Blairs<br>appnt.<br>2 Year | June 2014<br><br><br>June 2016 |
| 8 | Richard Gurgel | Interested or Knowledgeable Individual | July 2014 | First 1 Year | June 2015 |
| 9 | Wayne Andrus Recommended | Special Ed Director Daggett County | October 2014 | First 2 Years | June 2016 |
| 10 | Chris Edwards | Interested or Knowledgeable Individual | November 2014 | First 2 Years | June 2016 |
| | | | | | |
| | | | | | |
| **Non-Voting** | Suzy Blackham | USDB Teacher | October 2012 | First 2 Year<br>1 Year | June 2014<br>June 2015 |
| **Non-Voting** | Laura Belnap | State Board of Education | January 2015 | No term specified | No term specified |

| | | | | | |
|---|---|---|---|---|---|

According to the bylaws of the Utah State Schools for the Deaf and the Blind Advisory Council, Article III: Membership,

1. The Council is composed of at least six, but not more than eleven voting members who are appointed by the State Board of Education. Six voting members are specifically identified in Utah Code and five voting members are identified by these bylaws. Voting members identified by the bylaws may change as recommended by the Council and approved by the State Board of Education.

2. 2. Advisory Council membership shall include:
   2.1 two members who are blind;
   2.2 two members who are deaf; and,
   2.3 two members who are deafblind or parents of a deafblind child.

3. The Board may appoint other Advisory Council members who have an interest in and knowledge of the needs and education of students who are deaf, blind, or deafblind.

4. The Council may recommend that the State Board of Education create non-voting Council positions and/or appoint non-voting members to fill those positions. Current non-voting membership consists of:
   4.1 a person with expertise in school finance;
   4.2 a member of the State Board of Education; and,
   4.3 a representative of the USDB educators.

Updated March 27, 2014

# BYLAWS
# OF
# THE UTAH SCHOOLS FOR THE DEAF AND THE BLIND
# ADVISORY COUNCIL

## ARTICLE I
## STATUTORY AUTHORITY

1. The Advisory Council is established by act of the Utah State Legislature and incorporated in the Utah Code 53A-25b-203.

## ARTICLE II
## PURPOSE

1. The purpose of the Council is to advise the Utah State Board of Education and the USDB Superintendent and associate superintendents.

2. The Council shall advise and make recommendations to the Board, superintendent, and associate superintendents regarding;
   - 2.1. staff positions;
   - 2.2. policy;
   - 2.3. budgets; and,
   - 2.4. operations.

3. The Council shall advise the Board, superintendent, and associate superintendents as to:
   - 3.1. the needs of those children who are deaf, blind, and deafblind; and,
   - 3.2. the appropriate programs and services to address individual needs consistent with:
     - 3.2.1. state and federal laws;
     - 3.2.2. rules; and,
     - 3.2.3. regulations.

4. The Council shall also advise and make recommendations to the State Board regarding the continued employment of the USDB Superintendent and associate superintendents.

5. The Council may assume duties, responsibilities and functions as authorized and delegated to the Council by the State Board of Education.

## ARTICLE III
## MEMBERSHIP

1. The Council is composed of at least six, but not more than eleven voting members who are appointed by the State Board of Education. Six voting members are specifically identified in Utah Code and five voting members are identified by these bylaws. Voting members identified by the bylaws may change as recommended by the Council and approved by the State Board of Education.

2. Advisory Council membership shall include:
   - 2.1. two members who are blind;
   - 2.2. two members who are deaf; and,
   - 2.3. two members who are deafblind or parents of a deafblind child.

3. The Board may appoint other Advisory Council members who have an interest in and knowledge of the needs and education of students who are deaf, blind, or deafblind.

4. The Council may recommend that the State Board of Education create non-voting Council positions and/or appoint non-voting members to fill those positions. Examples of non-voting membership include:
   - 4.1. a person with expertise in school finance;
   - 4.2. a member of the State Board of Education; and,
   - 4.3. a representative of the USDB educators.

5. The Superintendent of the Utah Schools for the Deaf and the Blind shall be an ex-officio, non-voting member of the Council. Associate superintendents assist the Superintendent as staff to the Council.

6. Subcommittees may be created as needed.

7. The term of appointment for each member shall be two years and members may serve no more than three consecutive terms.
   - 7.1. In order to provide for staggered terms, the board shall appoint at least one council member in June of each year with the term of office to begin on July 1 of the year of appointment.
   - 7.2. Current members of the council shall continue in office until expiration of their terms and until their successors are appointed.

   - 7.3. The Council shall seek nominations to fill vacant positions and make recommendations to the State Board for filling vacant positions.
     - 7.3.1. Nominations may come from any individual or group interested in the operations of the Utah Schools for the Deaf and Blind.

7.3.1.1. Where applicable, nominations will be for specific Council positions as outlined in Article III above.

7.3.1.2. Nominations will not be considered without the consent of the individual being nominated.

7.3.2. Nominees may be discussed in an executive session of the Council.

7.3.3. Action to recommend nominees to the State Board for appointment will occur in an open meeting of the Council.

7.4. The Council may recommend that the State Board dismiss a Council member.

7.4.1. Causes for dismissal include:

7.4.1.1. violation(s) of these bylaws;

7.4.1.2. violation(s) of the Ethical Standards listed in Section VI;

7.4.1.3. inconsistent attendance at Council Meetings (attendance at 80% of scheduled meetings is expected); and,

7.4.1.4. other causes as determined by the Council.

7.4.2. Consideration of recommended dismissal may be discussed in an executive session.

7.4.3. Action to recommend dismissal of a Council member to the State Board will occur in an open meeting of the Council.

7.4.3.1. Action to recommend dismissal of a Council members must be approved by at least a 2/3 majority (8 of 11) of all voting members of the Council.

7.4.4. The State Board of Education may also remove Council members independent of a recommendation by the Council.

8. A member appointed to fill a vacancy occurring prior to the expiration of a predecessor's term is to be appointed for the remainder of that term.

9. As per State Board Rule 277-800, Advisory Council members may also serve as School Community Council members.

10. Liaisons shall be appointed representing the State Superintendent of Public Instruction and the Special Education unit of the State Office of Education.

## ARTICLE IV
## MEETINGS

1. The Council shall generally meet monthly, except July and December], but must meet at least ten times during a fiscal year.

1.1. Special meetings may be called as needed. Members unable to attend in person may arrange to participate by electronic means if

available.

2. A meeting held during the month of September shall be designated as the annual meeting.

3. A quorum shall consist of a majority of the voting Council members.
   3.1. In the event a quorum is not present, agenda items may be reviewed and recommendations confirmed at the next meeting.

4. Each voting member of the Council shall have one vote. Non-voting members can offer comments and recommendations but they have no vote, nor can they make motions or seconds to motions.
   4.1. No member may vote by proxy
   4.2. No member may vote in absentia.
   4.3. Members participating by electronic means may vote if their electronic participation is in real time.
   4.4. If the Council Chair is a non-voting member and a vote of the Council results in a tie vote, the Chair cannot vote to break the tie and the item being considered will be determined to have failed.

5. No member of the Council shall vote on any matter that would provide financial benefit to the member or otherwise give the appearance of a conflict of interest under State law.

6. Executive sessions may be held with a two-thirds vote of attending voting members. Items for discussion are restricted to:
   6.1. discussion of the character, professional competence, or physical or mental health of an individual;
   6.2. strategy sessions to discuss collective bargaining;
   6.3. strategy sessions to discuss pending or reasonably imminent litigation;
   6.4. strategy sessions to discuss the purchase, sale, exchange or lease of real property if public discussion of the transactions disclose the appraisal or estimated value of property under consideration, or prevent the public body from completing the transaction on the best possible terms.

7. Executive sessions are held consistent with the purposes outlined previously and consistent Utah Code. In all matters, role of the Council as an advisory body to the State Board of Education and the Superintendency of USDB must be maintained.

## ARTICLE V
## OFFICERS

1. The members of the Council shall elect a Chair and Vice Chair at its June meeting. Council officers may be non-voting members of the Council.

2. Chair: The chair shall :
   - 2.1. preside at meetings of the Council;
   - 2.2. assure that all recommendations of the Council are submitted to the State Board of Education;
   - 2.3. be the spokesperson for the Council in matters dealing with public and or press;
   - 2.4. appoint committee chair person(s) and member(s);
   - 2.5. give general direction to work of the Council; and,
   - 2.6. perform other duties as may be assigned by action of the Council, the State Board or as may be necessary.
   - 2.7. The term of the chair shall be for one year. In the event that a vacancy occurs prior to the end of term for the chair, the vice-chair shall take over the chairmanship for the unexpired portion of the term at the next meeting.
3. Vice Chair: The vice chair shall:
   - 3.1. Assist the chair
   - 3.2. Perform the duties of the chair in his/her absence
   - 3.3. The term on the vice-chair shall be for one year. In the event that a vacancy occurs prior to the end of the term of the vice-chair, the Council shall elect one of its members to fill the office for the unexpired term at the following meeting.
4. The Chair shall annually appoint a parliamentarian.
   - 4.1. The parliamentarian need not be a member of the Council but should be someone who attends Council meetings on a regular basis.

## ARTICLE VI
## ETHICAL STANDARDS

1. The Council adopts the following Ethical Standards. Council members shall:
   - 1.1. Represent the USDB Advisory Council with dignity and integrity.
   - 1.2. Be at meetings on time, eager and prepared.
   - 1.3. Help focus meetings on important matters, remembering that the student is always our most important matter.
   - 1.4. Value and respect the diverse opinions of others and resolve conflict amicably with civility and responsibility.

1.5. Listen closely to others, being careful about interrupting or dominating discussions.
1.6. Have the courage to be understood.
1.7. Avoid surprises - Collaborate and receive information from our constituents. As a Council, communicate frequently through proper channels with school staff, Board members, the Governor, the Legislature, and the press.
1.7.1. If a Council member is contacted by a legislator or the media, inform and invite the chairperson to participate if possible.
1.8. Represent the needs of all USDB students and families in the state --- as well as local interests --- without partisanship.
1.9. Seek to understand the feelings and opinions of the citizens and constituents.
1.10. Pursue accountability by appropriate evaluation and measurement.
1.11. Achieve unity.

## ARTICLE VII
## RESOURCES

1. The Council shall rely upon the Utah Schools for the Deaf and the Blind to provide resources necessary for conducting the affairs of the Council. The resources may include:
   1.1. meeting space;
   1.2. clerical support;
   1.3. professional staff;
   1.4. materials and supplies;
   1.5. postage and mailing services;
   1.6. copying services; and,
   1.7. meeting expenses.

2. Reimbursement shall be based upon actual expenses incurred or shall be in accordance with established State of Utah Division of Finance reimbursement rates, rules and regulations.

## ARTICLE VIII
## AMENDMENTS

1. These bylaws may be amended by a two-thirds majority vote of the Council members at any regular meeting provided that notice of the proposed change(s) was given with meeting notification. The State Board of Education shall be provided notice of any amendments to these bylaws.

## ARTICLE IX
## DISSOLUTION

1. In the event that legislative changes no longer mandate the existence of the Council, the Council may be dissolved by action of the State Board. At dissolution any records or properties held by the Council shall be transferred to an entity of similar purpose or be returned to the source from whence they came. The records shall revert to the custody of the State Board or to the custodian of the State's historical archives.

Adopted by the USDB Institutional Council November 18, 2004
Amended January 20, 2005
Amended April 21, 2005
Amended May 19, 2005
Amended and approved by the Advisory Council – December 10, 2009
Amended and approved by the Advisory Council – March 27, 2014

**53A-25b-201. Authority of the State Board of Education -- Rulemaking -- Superintendent -- Advisory Council.**

(1) The State Board of Education is the governing board of the Utah Schools for the Deaf and the Blind.

(2) (a) The board shall appoint a superintendent for the Utah Schools for the Deaf and the Blind.

(b) The board shall make rules in accordance with Title 63G, Chapter 3, Utah Administrative Rulemaking Act, regarding the qualifications, terms of employment, and duties of the superintendent for the Utah Schools for the Deaf and the Blind.

(3) The superintendent shall:

(a) subject to the approval of the board, appoint an associate superintendent to administer the Utah School for the Deaf based on:

(i) demonstrated competency as an expert educator of deaf persons; and

(ii) knowledge of school management and the instruction of deaf persons;

(b) subject to the approval of the board, appoint an associate superintendent to administer the Utah School for the Blind based on:

(i) demonstrated competency as an expert educator of blind persons; and

(ii) knowledge of school management and the instruction of blind persons, including an understanding of the unique needs and education of deafblind persons.

(4) (a) The board shall:

(i) establish the Advisory Council for the Utah Schools for the Deaf and the Blind and appoint no more than 11 members to the advisory council;

(ii) make rules in accordance with Title 63G, Chapter 3, Utah Administrative Rulemaking Act, regarding the operation of the advisory council; and

(iii) receive and consider the advice and recommendations of the advisory council but is not obligated to follow the recommendations of the advisory council.

(b) The advisory council described in Subsection (4)(a) shall include at least:

(i) two members who are blind;

(ii) two members who are deaf; and

(iii) two members who are deafblind or parents of a deafblind child.

(5) The board shall approve the annual budget and expenditures of the Utah Schools for the Deaf and the Blind.

(6) (a) On or before the November interim meeting each year, the board shall report to the Education Interim Committee on the Utah Schools for the Deaf and the Blind.

(b) The report shall be presented verbally and in written form to the Education Interim Committee and shall include:

(i) a financial report;

(ii) a report on the activities of the superintendent and associate superintendents;

(iii) a report on activities to involve parents and constituency and advocacy groups in the governance of the school; and

(iv) a report on student achievement including:

(A) student academic achievement data, including longitudinal data for both current and previous students served by the Utah Schools for the Deaf and the Blind;

(B) graduation rates; and

(C) students exiting the Utah Schools for the Deaf and the Blind and their educational

UTAH STATE BOARD OF EDUCATION

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Dixie L. Allen
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Joel Coleman, Interim Chief Executive Officer
Lorraine Austin, Board Secretary

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 10, 2015

**DISCUSSION:** Legislative Session Review

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**Background:**
The 2015 General Session of the 61st Legislature was held January 26, 2015 through March 12, 2015. Prior to the Session, the Board identified budget priorities and priorities for legislation for consideration by the legislature.

**Key Points:**
Board members will be provided with information regarding appropriations and legislation affecting the Utah public education system and the Utah State Office of Rehabilitation. The *Public Education Summary – General Session of the Utah Legislature 2015* can be found at http://schools.utah.gov/law/Legislative-Session/Summaries/2015.aspx.

**Anticipated Action:**
Board members will review the results of the session, identify successes, and consider changes for improving the process.

**Contact:** Superintendent Brad Smith, 801-538-7510
Bruce Williams, 801-538-7514

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 10, 215

**ACTION:** Utah Professional Practices Advisory Commission Cases

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**Background:** The Utah Professional Practices Advisory Commission (UPPAC) is advisory to the State Board of Education in making reports and recommendations regarding educator licensing to the Board. Each month a report of UPPAC actions is given to the Board, and specific cases with recommended actions, including suspension, revocation, and reinstatement of educator licenses, are brought to the Board for review and action.

**Key Points:** The Board has instituted a process for review and action on UPPAC cases. Generally, the first month a case comes to the Board with a recommendation from UPPAC the Board reviews the case in an executive session. Action is taken on the case in a subsequent meeting. Occasionally the Board will take action on a case under review the first time it is reviewed.

The following cases are submitted to the Board for action:

- Case No. 10-965
- Case No. 14-1218
- Case No. 12-1058

The following new case is submitted to the Board for review/possible action:

- Case No. 14-1226

**Anticipated Action:** The Board will consider action on UPPAC cases.

**Contact:** Ben Rasmussen, 801-538-7835

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UPPAC

Utah Professional Practices Advisory Commission
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Community Member

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for Complainant
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**UPPAC** is charged with maintaining and promoting a high standard of professional ethics among Utah educators. It is advisory to the State Board of Education in making recommendations regarding educator licensing and may take other disciplinary action respecting educator misconduct.

1.9.2015

MEMORANDUM

TO: Utah State Board of Education

FROM: Benjamin Rasmussen, Executive Secretary
Utah Professional Practices Advisory Commission (UPPAC)

SUBJECT: Recommendation of the Utah Professional Practices Advisory Commission (UPPAC)

DATE: April 10, 2015

The following recommendations of the Utah Professional Practices Advisory Commission (UPPAC) are transmitted for review and action by the Utah State Board of Education:

- **Case No. 10-965**
  The Commission recommends reinstatement of the educator's Utah Level 2 School Psychologist License that was suspended pursuant to a stipulated agreement in UPPAC Case No. 10-965 dated January 6, 2011. A reinstatement hearing was held January 7, 2015. UPPAC concluded that reinstatement is appropriate based on evidence and testimony presented at the reinstatement hearing. Reinstatement, following a UPPAC hearing and recommendation, is subject to Board approval.

- **Case No. 12-1058**
  The Commission recommends suspension of the educator's Level 2 Secondary Education License. UPPAC recommends that the educator's license be suspended for five (5) years with extensive conditions from the date of Board action pursuant to a stipulated agreement. Reinstatement, following a UPPAC hearing and recommendation, is subject to Board approval.

- **Case No. 14-1218**
  The Commission recommends suspension of the educator's Level 2 School Counselor License in UPPAC Case No. 14-1218. UPPAC recommends that the educator's license be suspended for at least one (1) year from the date of Board action pursuant to a stipulated agreement. Reinstatement, following a UPPAC hearing and recommendation, is subject to Board approval.

- **Case No. 14-1226**
  The commission recommends suspension of the educator's Level 2 Education License. UPPAC recommends that the educator's license be suspended for two (2) years with conditions from the date of Board action pursuant to a stipulated agreement. Reinstatement, following a UPPAC hearing and recommendation, is subject to Board approval.

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**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Brad C. Smith
Chief Executive Officer

**DATE:** April 10, 2015

**INFORMATION:** Update on Educator Effectiveness

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**Background:**
The Board has taken an active role in promoting best practices for educator evaluation. In 2012, Board Rule 277-531 *Public Educator Evaluation Requirements (PEER)* and S.B. 64 *Public Education Employment Reform* (2012 General Legislative Session) were adopted and implemented, providing additional direction for USOE staff to create a model system and provide guidance to LEAs.

**Key Points:**
The Board is also tasked in R277-531 with setting percentages for the three components of the overall educator effectiveness rating.

**Anticipated Action:**
Staff will provide a brief overview of the Educator Effectiveness project and an update of progress thus far. This will provide a backdrop for pending Board decisions.

**Contact:** Sydnee Dickson, 801-538-7515

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| Dates | Educator Evaluation Development and Implementation Timeline | |
|---|---|---|
| | **USOE** | **LEAs** |
| **Nov. 2011 through Feb. 2012** | · Engage stakeholder groups (parents, teachers, principals, associations, superintendents, higher education, business community, students, ethnic minority community, advocates for students with disabilities, the USOE staff)<br>· Begin on-going Communication Plan with stakeholders<br>· Determine guiding factors for selecting observation instruments<br>· Refine work of targeted measurement tools<br>· Determine high leverage instructional strategies for summative tool<br>· Determine processes for teaching and leadership evaluations<br>· Determine levels of performance that match Board requirements<br>· Determine weights for the measures<br>· Ensure validity and usefulness of the measures and determine how reliability will be determined through pilots<br>· Establish data infrastructure<br>· Establish data validation process<br>· Determine criteria for confidentiality<br>· Develop online resources for self-assessment, professional growth plans, and PD360 resources aligned with standards | · LEAs select representation for LEA Joint Educator Evaluation Committee<br>· LEAs send JEEC members' names to the USOE<br>· Convene LEA JEEC committee to analyze current LEA practices<br>· Determine roles and responsibilities of stakeholders on LEA JEEC |
| **Mar. 2012** | · Decide where and when to pilot the system<br>· Hold 2nd USOE Educator Evaluation Summit | · Give input to the USOE model |

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| **Through June 2012** | · Roll out measurement elements to system for feedback<br>· Determine factors to consider when evaluating the system<br>· Determine what resources are available to evaluate the system<br>· Report to stakeholders<br>· Prepare districts for 2012-13 pilot<br>· Develop and provide professional development for model tools and resources<br>· Train stakeholders on data base for inputting performance levels for educators | · Determine to adopt the USOE model or develop LEA model<br>· Discuss policy that will list consequences for failure to meet performance levels<br>· Determine training needs and criteria for selecting evaluators<br>· Plan how evaluation results will be used<br>· Establish a plan for assessing the LEA selected evaluation system |
| **2012-2013** | · Support pilots with technical assistance<br>· Provide technical assistance to non-pilot schools<br>· Build capacity in LEA evaluation liaisons<br>· Monitor evaluators reliability<br>· Gather and analyze data from pilot districts<br>· Provide professional development for teachers and leaders on SLO and SGP process | |
| **2013-2014** | · Statewide implementation of model system or LEA developed systems<br>· Gather data from all LEA evaluation systems<br>· Analyze data and make adjustments to the USOE and LEA systems where needed<br>· Continue development of SLOs and pilot new SAGE assessment system | |
| **2014-2015** | · Develop, refine, field test, and pilot SLOs for student growth measure<br>· Full implementation of observation tools aligned with UETS and UELS<br>· Electronic platforms selected by districts<br>· Districts begin SLO development using SLOs and USOE SLO Toolkit<br>· USOE conducts Comprehensive Pilot in selected districts to determine weights of three components<br>· USOE Rater Certification process in place by June 30, 2015<br>· Rater Certification events scheduled in districts statewide to support rater development<br>· Utah Professional Development Standards approved by legislature | |

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| **2015-2016** | · Full implementation of growth as a component of evaluations for all teachers and principals, including personnel decisions<br>· Percentages of components weights set by State Board<br>· Component and summative ratings of teachers and leaders reported in CACTUS<br>· All raters of observation tools certified by June 30, 2016<br>· USOE and districts assess professional developments needs based on evaluation data |
| **2016-2017** | · First use of data (2016-2017 assessment and evaluation data) for informing regarding performance pay. |