

Utah State Charter Board

Charter Application for



EXCELSIOR ACADEMY

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A Leveled learning Charter School in Tooele County

School Year 2009-2010

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

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

Ann Gubler

Authorized Agent (please print)

Signature of Authorized Agent

Date

All information presented in this application becomes part of the charter contract and may be used for accountability purposes throughout the term of the charter contract.

Table of Contents

Section	Title	Page
2	Title Page	1
3	Target Population	2
4	Market Analysis	8
	Site/Location/Facility	9
	Educational Landscape	9
	Market Trends	13
	School Advantage	14
	Outreach to Minorities	15
5	Capital Facility Plan	16
6	Detailed Business Plan	19
	Three Year State Budget	20
	MSP Worksheets	22
	Planning Year Budget	25
	Budget Scenarios	26
	Budget Notes	27
	Four Year Cash Flow	28
	Budget Summary & Scoring	29
7	Fiscal Procedures	31
	School Purchasing	32
	Board Minutes	34
8	Organizational Structure and Governing Body	35
	Board Member Roles	36
	Flow of Information/School Partnerships	39
	Management Structure	40
9	Background Information Sheet and Resume SOME INFORMATION REMOVED FOR PUBLIC VIEWING	41
10	Articles of Incorporation	66
11	Comprehensive Program of Instruction	71
	Effectiveness Goals	79
	Lesson Plans/ Master Course Lists	82
	Program Instruction	126
	Calendar and Master Schedule	129
	Special Education	133
12	Admission and Suspension/Expulsion Procedures	136
13	Procedures to Review Complaints	141
14	Opportunities for Parental Involvement and Influence	143
15	Educator Qualifications	146
16	Administrative Services	149
17	Library Plan	158
18	Extracurricular Activities	162
19	Terms and Conditions of Employment	164
20	Employee Evaluation	166
21	Employment of Relatives	170
22	Insurance	172
24-27	Assurances, Additional Information, Retirement	175

Title Page

Name of Proposed Charter School Excelsior Academy
 New School Converted School

Name of Applicant Applying for the Charter Excelsior Academy
 (This may be a public body, private person, or private organization.)

Authorized Agent for Applicant Ann Gubler
 (This may be the individual applicant or an authorized member of the corporate board.)

Authorized Agent Mailing Address 460 South 100 West

City Tooele State Utah Zip 84074

District school will be located Tooele E-Mail agubler@wirelessbeehive.com

Daytime Phone 435-882-4410 Fax _____

Form of Organization

- Non Profit Corporation
- Tribal Entity
- _____

The governing body of a charter school is responsible for the policy decisions of the school.
 The makeup of this body is as follows:

Name	Phone Number	Type of Member	Position on Board
Ruth Dunn	435-882-6202	Parent	Acting PTO President
Ann Gubler	435-882-4410	Parent	Chair
Heidi McCabe	801-487-5863	Parent	Vice Chair
Heather McClatchey	435-840-3821	Parent	Secretary
Terry Hancock	435-882-6665	Parent	Treasurer
Brenda Spearman	435-843-1134	Parent	Trustee
Mack Stoddard	435-843-5194	Parent	Trustee

Section 3

Target Population



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Target Population

Mission Statement

The mission of Excelsior Academy is to provide students with a broad, classical foundation of knowledge, assisting them with opportunities to learn at their level with the option to accelerate their advancement, and an environment to help students acquire a life-long love of learning.

	GRADES AND SPECIFIC NUMBER OF STUDENTS SERVED BY GRADE													TOTAL NUMBER OF STUDENTS (Enrollment cap)	
	Year 1	K	1	2	3	4	5	6	7	8	9	10	11		12
FY09	72	72	72	72	72	72	72	72	72	72					648
FY10	72	72	72	72	72	72	72	72	72	72					648
FY11	72	72	72	72	72	72	72	72	72	72					648
Ultimate Enrollment	72	72	72	72	72	72	72	72	72	72					648

(The number of students should be at maximum the enrollment that is being requested)

School Calendar

Standard Year
 Extended School Year
 Alternative (please describe in 5 words or less)

Instructional Days 180 this includes 3
parent/teacher conference days
 Start Date August 19, 2009

Excelsior Academy will meet the seven defined purposes for charter schools (Title 53A-1a-503) as follows:

- 1. Continue to improve student learning:** In order to assist students with individual learning abilities, *at their level*, teachers will have access to supplementary curriculums in Math, Language Arts and Reading. They can use these materials along with intervention with tutors in a tiered plan to prevent students from falling behind.

Students that learn at a fast pace (even if it's only in one topic) are given the opportunity to accelerate their learning. Math and Language Arts/Reading will be taught at the same time in each classroom in grades 1 through 8. If a student's test scores (formative, summative and curriculum specific placement tests) and teacher observations indicate an advanced capability in a subject (Math and Language Arts/Reading), they have the option of attending a Math or Language Arts/Reading course that is above their current grade level.

- 2. Encourage the use of different and innovative teaching methods:** Excelsior understands that each student is an individual and, therefore, has individual learning styles. In order to provide an excellent education for each student, and to fulfill the mission of helping children *learn at their level*, Excelsior will incorporate different elements of instruction, including visual, auditory, and hands-on learning, particularly in the tiered Tutor Intervention Program (TIP) where supplemental materials will be aimed more directly at unique learning styles than the core curriculum used in the main classroom.

Excelsior Academy has developed a Directed Learning Time that will be known to the students as 'Club Time' to encourage a *life-long love of learning*. This mandatory program will take place the last hour of each full school day. Teachers will select a topic aligned with the Utah state core and head up a quarter-long club. The teachers will have freedom to choose subjects that they are excited about and that their students express an interest in learning while fulfilling state requirements as stated in the Utah State Core of Education. Students will be able to select the clubs in which they would like to participate.

- 3. Create new professional opportunities for educators that allow them to participate in designing and implementing the learning program.** Teachers at Excelsior Academy will be very involved in the design and implementation of the learning program. Excelsior will offer the teachers a choice in curriculum used in the classroom. Teachers will be able to develop a familiarity with a broad range of curriculums through structured group and individual investigation and will have the resources to aid a struggling student or challenge a gifted one. Excelsior Academy teachers will

incorporate different elements of instruction including visual, auditory, and hands-on learning, particularly in the tiered Tutor Intervention Program where supplemental materials will be aimed at different learning styles than the core curriculum used in the main classroom. Another example of this is a teacher's involvement in 'Club Time'. Teachers will choose a topic, with the approval of the director, to present during a quarter-long club. These topics can be deeper studies of subjects from the core curriculum (Ancient Greece, Math, Classic Literature Studies, Chess, or Movie Production. With teachers choosing topics they are interested in, and children attending clubs of their choice, teachers will model enthusiasm for learning and children will have a willingness to learn.

An important focus at Excelsior is opportunities for teachers to gain training, continuing education, and endorsements. It will be one of the Academy's budgeting priorities.

- 4. Increase choice for learning opportunities for students:** Excelsior Academy will provide choice in learning opportunities for its students through their ability to *learn at their level* and 'Club Time'.

A student's individual needs, such as gaps in his/her education, struggles with certain areas of understanding, or difficulty progressing in the acquisition of knowledge, will be addressed with TIP. Through the option of moving up a level, gifted, talented and accelerated children will have opportunities for challenge and advancement to ward off complacency or a dislike of education caused by boredom or needless repetition. This program will utilize supplemental materials aimed at different learning styles that are not met through teaching with the core curriculum used in the main classroom

- 5. Establish new models of schools and new forms of accountability that emphasize measurement of learning outcomes and the creation of innovative measurement tools.** Students will be continually assessed throughout the school year to ensure their individual educational needs are met (AIMSweb, Traditional Grades, Teacher/Parent/Student recommendations). Excelsior Academy will teach students to become accountable for their education in that they will present personal Portfolios as a formative assessment for parents and teachers. Students will evaluate their performance, report on their progress and follow up on personal goals in regular 'Student led' Parent/Teacher conferences.

- 6. Provide greater opportunities for parental involvement in management decisions at the school level.** Excelsior Academy believes that parent participation is a key factor to its success. The academy respects parents who want to be involved and feels that it is important for parents to participate in their children's education. Parent participation helps make strong communities and raises confident children. Therefore, the academy will invite all parents and qualified family members to participate in the many volunteer opportunities that will become available throughout the school year. Some examples of parental involvement at Excelsior Academy are: the Parent Teacher Organization, The Parent Advisory Committee, Parent “seats” on the Excelsior Board of Directors and opportunities in the Tutor Intervention Program. Parent participation is paramount to the success of Excelsior Academy in achieving the goals of the school.

- 7. Expand public school choice in areas where schools have been identified for improvement, corrective action or restructuring under the No Child Left Behind Act.** Excelsior Academy will give the communities in the Tooele Valley a choice in the public education of their children. Currently in the Tooele Valley there are no other choices in education for grades Kindergarten through Eighth Grade on one campus. A small parochial school serves pre-school through 2nd grade. Two school, Northlake and Overlake failed AYP for the 2006-2007 school year. East and Stansbury passed after a review, and their failing status was reversed. Five of the eleven schools AYP scores went down in either Language Arts or Mathematics. The Tooele County School District passed for the 2006-2007 school year after their failing status was reviewed. The Tooele Valley would benefit from having a tiered learning environment in the area.

**Tooele County Elementary/Junior High Annual Yearly Progress (AYP)
Scores**

School	Year	Mathematics	Language Arts	Make AYP
Copper Canyon	2006	No data available	No data available	yes ¹
	2007	79	75	yes
East	2006	75	86	yes
	2007	72	79	yes ²
Grantsville	2006	78	84	yes
	2007	79	82	yes ³
Harris	2006	73	80	no
	2007	76	81	yes
Middle Canyon	2006	68	78	yes
	2007	69	74	yes
Northlake	2006	72	82	yes
	2007	74	81	no
Overlake	2006	87	88	yes
	2007	82	86	no
Rose Springs	2006	83	88	yes
	2007	82	87	yes
Stansbury	2006	85	91	yes
	2007	85	89	yes ⁴
West	2006	79	84	yes
	2007	78	85	yes
Clark N. Johnson Junior High	2006	School not open	School not open	
	2007	77%	81%	yes
Grantsville Junior High	2006	75	80	yes
	2007	71	81	yes ⁵
Tooele Junior High	2006	77	74	yes
	2007	82	79	yes

¹ Copper Canyon in 2006 requested a review of their failing status and upon review the school passed AYP.

² East in 2007 requested a review of their failing status and upon review the school passed AYP.

³ Grantsville in 2007 requested a review of their failing status and upon review the school passed AYP.

⁴ Stansbury in 2007 requested a review of their failing status and upon review the school passed AYP.

⁵ Grantsville Junior High in 2007 requested a review of their failing status and upon review the school passed AYP.

Section 4

Market Analysis

Site/Location/Facility
Educational Landscape/Market Trends
School Advantage
Outreach to Minorities



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Facility

The Board of Trustees of Excelsior Academy will follow Utah State Purchasing Policies and Procedures (Utah Statute 63-56-410) when selecting a contractor to build the facility. The Board has obtained preliminary information regarding land and development from Ironwood Real Estate of Tooele.

The property is located in the unincorporated area of Erda and is 5.36 acres.⁶ This site is developed with water and electricity. This site is centrally located between the highest populated areas of Tooele County: Tooele City, Grantsville and Stansbury Park. The property is located 600 feet east of SR36 which is the main throughway connecting Tooele City and Stansbury Park. It will provide easy driving access for residents of Grantsville via Erda Way. Walking access to the site is limited. This will be taken into account in the planning of the parking lot as well as the pick up and drop off zones for the school. This site is approximately 2.8 miles from Rose Spring Elementary, 3.4 miles from Overlake Elementary and 3.8 miles from Clark N. Johnson Junior High School. The Board of Trustees will continue to look at possible sites before making a final decision. They will take into consideration ease of commute for parents and students, acreage available, and student safety. Any property considered will be at least 3 1/2 acres.

The Board of Trustees has not selected a building plan. The Board is considering many options for the structure which will consist of: 32 classrooms: 4 Kindergarten classes utilizing 2 classrooms, 24 classrooms for grades 1 through 8 utilizing 3 classrooms per grade, 3 classrooms for Special Education, and the remaining rooms for special use as needed. The plan will also include a nurse's station, two administrative offices and a conference area, a reception area, multiple restrooms meeting ADA code, a teacher workroom and restroom, a 'cafetorium', a library, a kitchen, storage areas, a special education room as well as an IT room and utility closet. The campus will also have a playground, a drop off and pick up area as well as sufficient parking for staff and visitors. The campus will be ADA compliant.⁷

Excelsior Academy will enter into a lease contract with the option to purchase the property and building from the developer. Excelsior Academy is planning to secure funding through grants, fundraising and/or a tax free bond to purchase the property and building.

Educational Landscape

In the last decade Tooele Valley has seen unprecedented growth. Fifty percent of the eleven elementary schools in Tooele County School District report a class size

⁶ Site photograph Insert 4-1

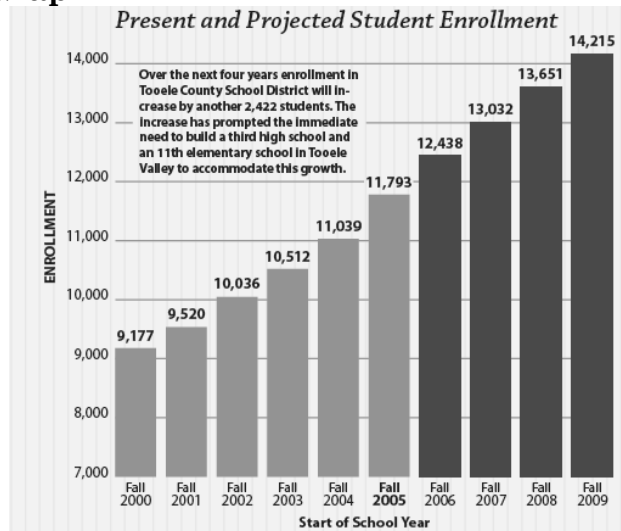
⁷ Preliminary building plan 4-2

average over 28 and are at or over capacity.⁸ The county currently has three junior high schools, one serving Grantsville and serving the Tooele seventh and eighth graders. The Tooele County School District (TCSD) has had to realign school boundaries in order to fill newly constructed schools and keep enrollment at the individual schools manageable. The challenge that the school district faces is evident in recent school reporting numbers. With the student population growing every year TCSD is faced with the task of providing schools to educate the communities' school age children.

Currently Tooele County has one private school, St. Marguerite's Parochial School. It serves pre-K through third grade with the vision of adding two new grades each year until the school becomes a full spectrum facility with classes through the eighth grade. Its student/teacher ratios are 15:1 with the capacity to grow to a 20:1 ratio. St. Marguerite's current enrollment is 110 students with projections to grow to 250 students.

Home Schooling in Tooele County has increased greatly over the past several years. Approximately 320 students in the district boundaries are home schooled outside any district program. TCSD offers an online academy in which Kindergarten through 12th graders can work from home. The district currently has 35 students enrolled in this academy. Online enrollment at a state level is approximately 1500 students in its fifth year (2007-2008). According to the district supervisor the online schooling community increases every year. TCSD states that overall the percentage of the students outside of the traditional school remains steady in comparison to the population growth.

Graph 4-4



Graph from the TCSD Yearly Progress Report 2005

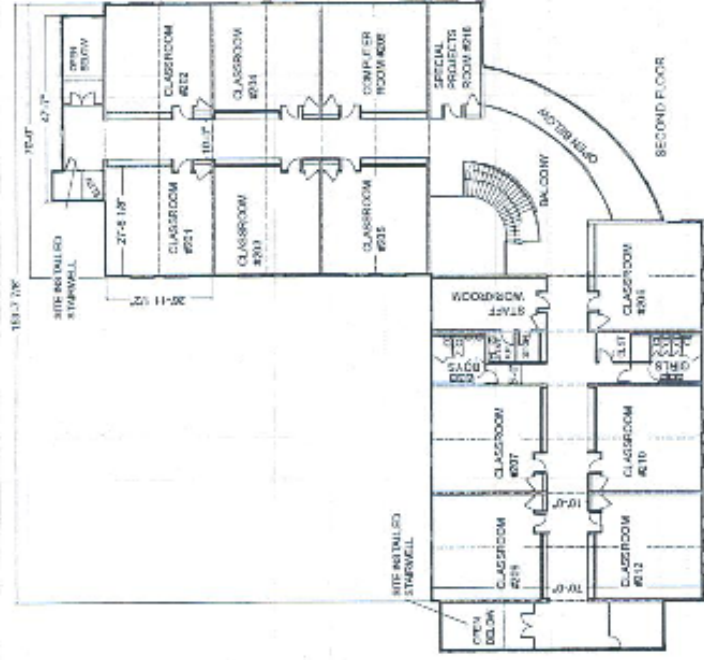
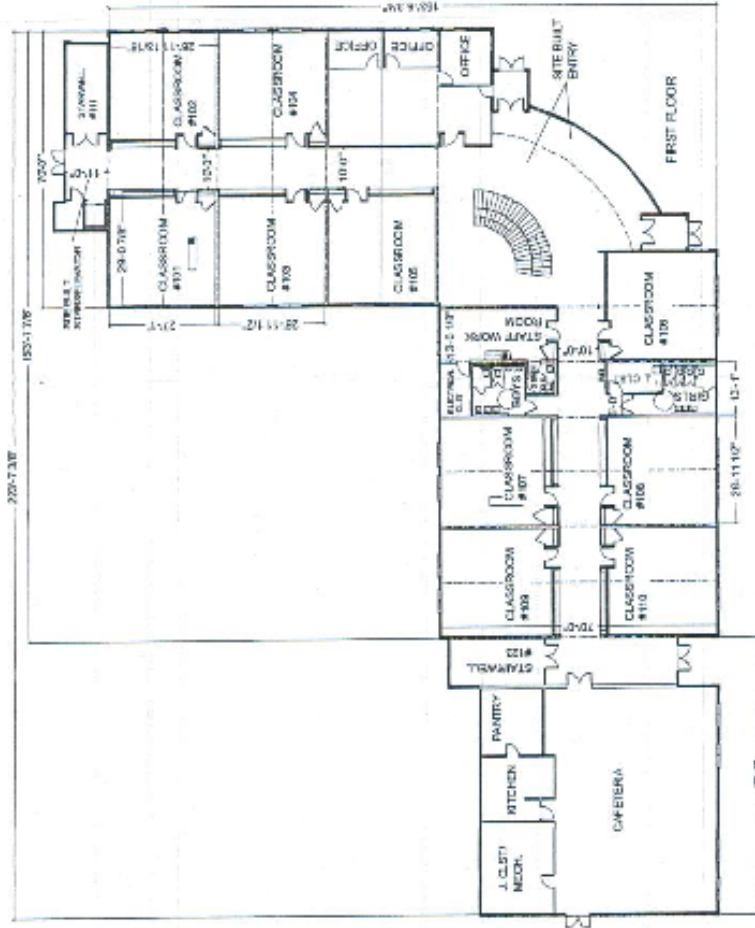
⁸ Graph 4-4 Present and Projected Student Enrollment chart at end of this section



Site Plan 4-1

Proposed Building Plan 4-2

This floor plan is preliminary; modifications will be needed to accommodate Excelsior Academy.



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Market Trends

In recent years, Tooele County has had a substantial increase in population. In 2006 the Governor's Office of Planning and Budgeting stated that Tooele County was the 5th fastest growing county in the state with a growth rate of 4.3%. The birth rate in Tooele County is 6.4% well above Utah's average of 2.4% annually. According to TCSD officials there were over 1000 students entering kindergarten in the 2006/07 school year. This number is expected to increase as births continue to increase and those children prepare to enter the school system. According to the 2000 census 16% of the population of Tooele County was between the ages of 5 and 14 or school aged children. It is projected that in 2010 the number of school aged children in Tooele County will be just over 10,000 up from 6,400 in 2000.

Tooele County School District currently has 11 Elementary Schools in the Tooele Valley with one under construction. Many of the schools in the Tooele Valley are at or close to capacity with a few schools over capacity. Therefore with the continual increase in population there is a need for more schools to provide an education for the school aged children of the valley.

Tooele County School District Enrollment

School	School Capacity	Current Enrollment
Copper Canyon	700	632
East	580 5 portables	681
Grantsville		756
Harris	527 2 portables	533
Middle Canyon	750	646
Northlake		648
Overlake	700	664
Rose Springs	700	782
Stansbury		611
West	600 6 portables	737
Willow	700	571
Clark Johnson Junior High	1200	597
Grantsville Junior High	800	695
Tooele Junior High		545

As seen with the growth of St. Marguerite's Parochial School there is a need for more schools in Tooele County that provide smaller class sizes paired with a classical education to support the growth in the community.

School Advantage

Excelsior Academy will provide the Tooele Valley with a school that will have smaller class sizes; approximately 24 students per class. Currently in the Tooele Valley student/teacher ratios are approximately 28:1. Excelsior projects the student/teacher ratio to be approximately 24:1.5 (with one teacher and a part time aide in each class).

Excelsior Academy students will gain a ***broad, solid foundation of classical knowledge*** to prepare them for future learning and enable them to develop character qualities that will assist them in their life as an adult. This will be accomplished through the use of the Core Knowledge Sequence paired with the Utah State Core Curriculum.

Students at Excelsior Academy will be encouraged to ***learn at their level***, individual needs will be addressed such as gaps in their education, struggles with certain areas of understanding, or difficulty progressing in the acquisition of knowledge. Excelsior Academy will utilize many level-specific testing methods such as curriculum-specific placement testing, AIMSweb (an online student educational level monitoring program), as well as formative evaluations. Excelsior Academy will also use the state required summative evaluations when considering student placement in Language Arts/ Reading and Mathematics. However, students will be required to take all state-required assessments for the grade in which they are enrolled. Gifted, talented and accelerated children will have opportunities for challenge and advancement to ward off complacency or a dislike of education caused by boredom or needless repetition.

Excelsior Academy will teach students to foster a ***life-long love of learning*** through directed learning or 'Club Time'. Students will be introduced to a broad range of topics through the comprehensive core curriculum and will be given an opportunity to learn more about subjects that interest them through structured, mandatory attendance at different clubs throughout the year. These clubs will take place during regular school hours. This will demonstrate to the students that learning is not just about the grade or the test, but also about the enjoyment of understanding and having knowledge with which to pull from in order to comprehend more of the world. Teachers will choose a topic, with the approval of the director, to present during a quarter-long club. These topics will be aligned with the Utah State Core Curriculum and can be in diverse areas such as Ancient Greece, Math, Classic Literature, Chess, Movie Production, Study Time, and Soccer. These studies will enable students to delve deeper into topics than possible in regular classroom study. Students will have the option to use a teacher directed study time for additional assistance in areas where they are struggling or feel they need extra help. With teachers choosing topics they are interested in, and children

attending clubs of their choice, teachers will model enthusiasm for learning and children will have a willingness to learn.

Outreach Plan

Excelsior Academy will market its opening and accessibility to prospective students and parents through passive advertising and active personal opportunities.

Excelsior Academy will advertise with the Tooele Transcript Bulletin newspaper, Tooele City's electronic marquee and its web site's community calendar, local business-owned community boards, and Excelsior Academy's own website.

Excelsior Academy will hold public meetings, have personal contact in the form of door-to-door canvassing using translators as necessary, and/or personal notification throughout the community. Other avenues will include the Tooele office of Salt Lake Community Action Program (CAP) and its Head Start Program. Head Start and CAP have given permission to advertise via fliers and posters at their sites.

CAP has stated that it could add information regarding Excelsior Academy to its referral program for those whose needs may be better met by a charter school. Each outreach source will include contact information such as names, physical and web address, and phone number(s). Excelsior Academy will reach out to the special needs population, second language population, low income population, minority population and the entire community through these passive and active means.

Excelsior Academy will take advantage of any opportunities to market its opening and accessibility to the community.

Section 5

Capital Facility Plan

Options for Facility/Land/Financing



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Capital Facility Plan

Excelsior Academy is evaluating a number of development companies including Ironwood Real Estate of Tooele, Utah and Charter Holdings of Logan, Utah. Ironwood Real Estate has volunteered to fund the purchase of the land and building costs.⁹ Excelsior Academy would then lease the school building and land from the developer. The site will consist of approximately 5 acres. The site is to be determined by Excelsior Academy and the developer. The Facility shall be built to comply with all state and federal building codes relating to public schools.

The goal is to create an efficient and low cost structure in both construction and operation. It will accommodate approximately 648 students. The proposed spaces to be part of the final floor plan are as follows:

- 32 classrooms, 29 for teaching and three for special use
- One nurse station
- Two administrative offices and a conference area
- One reception area
- Multiple bathrooms to ADA code
- Teacher workroom and bathrooms
- 'Cafetorium' (cafeteria/auditorium/multi-purpose room)
- Library
- Kitchen
- Storage Areas
- Special Education Room
- IT Room and Utility Closet

Each classroom will have outside windows and/or outside doors. Classrooms will accommodate approximately 24 students.

⁹ Letter of Intent from Ironwood Real Estate 5-1

Excelsior Academy Group
Attention: Brenda Spearman
788 East 540 North
Tooele, Utah 84074

November 16, 2007

Dear Brenda:

Please consider this our letter of Intent to provide construction consultation and a possible development agreement for providing services to your group.

Proposed Plat Locations

I have included two optional locations with this letter. These locations are what I would consider areas of interest; however we would not be limited to these. Our company has access to and ownership in several areas in Tooele County.

The first is the former Albertsons building. Located in the heart of Tooele City. This building is 34,000 square feet with ample parking and adequate access. This building would be reconstructed to fit the needs of the Academy. This location would provide students within walking distance to the facility.

The second is a new building, constructed on property in Erda, UT. This property is located on Erda Way, 600 Feet off of Highway 36. This building could be constructed to any size. This site consists of 5.36 acres and would accommodate any intended use of the Academy. This site is limited in walking distance and would have to account for students driven to and from the School.

As mentioned previous, we are not limited to either of these sites. I believe that we could find a site or building to meet your requirements. Thank you for the opportunity to be part of this project and look forward establishing a business relationship with you.

Sincerely,



Joseph White
Ironwood Real Estate

Section 6

Detailed Business Plan

Three Year State Budget
MSP Worksheets
Planning Year Budget
Budget Scenarios
Budget Notes
Four Year Cash Flow
Budget Summary & Scoring



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State Budget

	First Year			Second Year			Third Year		
	# of Staff	@ Salary	Total	# of Staff	@ Salary	Total	# of Staff	@ Salary	Total
Number of Students (ADM):			648			648			648
Revenue			Total			Total			Total
State Funding			\$ 3,183,327			\$ 3,248,352			\$ 3,282,058
Federal & State Projects			\$ -						
Private Grants & Donations			\$ -						
Loans			\$ -						
Other (Specify)			\$ 500			\$ 1,000			\$ 5,000
Total Revenue			\$3,183,827			\$ 3,249,352			\$ 3,287,058
Expenses			Total			Total			Total
Salaries (100)									
Director	1.00	\$ 62,000	\$ 62,000	1.00	\$ 63,240	\$ 63,240	1.00	\$ 64,505	\$ 64,505
Teachers	26.00	\$ 36,000	\$ 936,000	26.00	\$ 36,720	\$ 954,720	26.00	\$ 37,454	\$ 973,814
Asst. Director	1.00	\$ 38,000	\$ 38,000	1.00	\$ 38,760	\$ 38,760	1.00	\$ 39,535	\$ 39,535
Secretary	1.00	\$ 30,000	\$ 30,000	1.00	\$ 30,600	\$ 30,600	1.00	\$ 31,212	\$ 31,212
Receptionist	1.00	\$ 22,000	\$ 22,000	1.00	\$ 22,440	\$ 22,440	1.00	\$ 22,889	\$ 22,889
Sped Ed/ELL	2.00	\$ 40,000	\$ 80,000	2.00	\$ 40,800	\$ 81,600	2.00	\$ 41,616	\$ 83,232
Instructional Assistants			\$ 217,100			\$ 221,442			\$ 225,871
Substitutes			\$ 15,000			\$ 15,300			\$ 15,606
Employee Benefits (200) /Payroll Taxes			\$ 539,270			\$ 550,055			\$ 561,057
Travel(580)			\$ 1,000.00			\$ 1,000			\$ 1,000
Purchased Professional Services(300)			\$ 60,000			\$ 60,000			\$ 60,000
Purchased Property Services(400)									
Instructional Aids/Books/Library(600)			\$ 80,000			\$ 80,000			\$ 80,000
Supplies(600)			\$ 32,500			\$ 32,500			\$ 32,500
Legal(300)			\$ 5,000			\$ 5,000			\$ 5,000
Auditor(300)			\$ 5,000			\$ 5,000			\$ 5,000
Marketing (300)			\$ 2,000.00			\$ 1,000			\$ 1,000
Other (printing; postage)			\$ 1,000.00			\$ 1,000			\$ 1,000

Total Instruction, Administration & Support						\$ 2,163,657				\$ 2,203,221
Operations & Maintenance						Total				Total
Supplies						\$ 5,000				\$ 5,000
Phone/Communications						\$ 6,000				\$ 6,000
Advertising / Printing						\$ 6,000				\$ 6,000
Property/Casualty Insurance						\$ 20,057				\$ 20,458
Utilities						\$ 50,000				\$ 50,000
Rent										
Fees/Permits & dues										
Transportation						\$ 2,000				\$ 2,000
Food Service										
Accounting Services						\$ 54,000				\$ 54,000
Land & Improvements										
Building Maint. & Custodial						\$ 80,000				\$ 80,000
Computer Equipment						\$ 37,500				\$ 37,500
Furniture & Other Equipment						\$ 10,000				\$ 10,000
Upgrades (Connectivity)										
Leases/Loan Payments						\$ 675,944				\$ 675,944
Other (security, copier lease)						\$ 13,000				\$ 13,000
Total Operations & Maintenance						\$ 999,108				\$ 959,903
Total Expenditures						\$ 3,124,978				\$ 3,163,123
Total Revenues						\$ 3,183,827				\$ 3,287,058
Budget Balance (Revenues-Expenditures)						\$ 58,849				\$ 123,934

Revenue Projection

FY 2009-2010

	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	72	0.55	39.6
Estimated ADM (1-3)	216	0.9	194.4
Estimated ADM (4-6)	216	0.9	194.4
Estimated ADM (7-8)	144	0.99	142.56
Estimated ADM (9-12)	0	1.2	0
Special Ed Pre-School	0		
Special Ed ADM (K)	1		
Special Ed ADM (1-12)	62		
Special Ed (Self-Contained)	1		
Number of Teachers (K-6)	20		
Number of Teachers (7-12)	6		
WPU Value	\$2,514		
Prior Year Teacher FTE (CACTUS)	0		
Prior Year WPUs	0		
ELL Students	0		
Low Income Students-prior year	0		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	570.9600	\$ 1,435,393
Professional Staff	0.03800	21.6965	54,545
Restricted Basic School:			
Special Ed--Add-on	1.0000	63.5500	159,765
Spec. Ed. Self-Contained	1.0000	1.0000	2,514
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$215 per K-8 ADM		139,320
Total WPU Programs		657.2065	\$ 1,791,537
Non-WPU Programs			
Related to Basic Programs:			
SS & Retirement	\$ 478.07 per WPU		\$ 314,191
Quality Teaching Block Grant	\$944 per CACTUS prior year teacher FTE OR, if new, use current teacher FTE		-
	\$76 per total prior year WPUs; OR if new, \$76 X C35 or current WPUs		24,544
			-
Local Discretionary Block Grant	\$41		49,948
Interventions-Student Success	\$22 per K-12 WPU \$90 per ELL student		23,409
			12,561
			-
Special Populations			
At Risk Regular Program	\$6 per total prior year WPUs; OR if new, \$6 X C35 or current WPUs		-
	\$4 per K-12 WPU		3,943
Gifted and Talented			2,284
Other			
School Land Trust Program	\$39 per student		-
Reading Achievement Program	\$19 per total prior year WPUs \$3 per K-3 student		-
	\$42 per low income student		864
	\$62 per student		-
Charter Administrative Costs			40,176
Local Replacement Dollars	Average \$1,021 per student		662,629
Total Non-WPU			\$ 1,134,549
One Time			
Teacher Materials/Supplies	\$360 or \$285 per teacher (K-6) ¹ \$310 or \$235 per teacher (7-12) ²	20	5,700
		6	1,410
ADM costs (ongoing & one-time)	\$393 - \$10 Tooele Local Rplcement	648	248,184
Library Books and Resources	\$3 per student	649	1,947
Total One Time			\$ 257,241
ESTIMATED Total All State Funding			\$ 3,183,327
¹ Steps one through three get \$360; steps four or higher get \$285			
² Steps one through three get \$310; steps four or higher get \$235			
Questions: Call Cathy Dudley @ 538-7667			Updated 04-17-07

Revenue Projection

FY 2010-2011

	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	72	0.55	39.6
Estimated ADM (1-3)	216	0.9	194.4
Estimated ADM (4-6)	216	0.9	194.4
Estimated ADM (7-8)	144	0.99	142.56
Estimated ADM (9-12)	0	1.2	0
Special Ed Pre-School	0		
Special Ed ADM (K)	1		
Special Ed ADM (1-12)	62		
Special Ed (Self-Contained)	1		
Number of Teachers (K-6)	20		
Number of Teachers (7-12)	6		
WPU Value	\$2,564	Assuming 2% increase over prior year	
Prior Year Teacher FTE (CACTUS)	26		
Prior Year WPUs	600		
ELL Students	0		
Low Income Students-prior year	0		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	570.9600	\$ 1,464,101
Professional Staff	0.03800	21.6965	55,636
Restricted Basic School:			
Special Ed--Add-on	1.0000	63.5500	162,960
Spec. Ed. Self-Contained	1.0000	1.0000	2,564
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$215 per K-8 ADM		139,320
Total WPU Programs		657.2065	\$ 1,824,581
Non-WPU Programs			
Related to Basic Programs:			
SS & Retirement	\$ 478.07 per WPU		\$ 314,191
Quality Teaching Block Grant	\$944 per CACTUS prior year teacher FTE OR, if new, use current teacher FTE		24,544
	\$76 per total prior year WPUs; OR If new, \$76 X C35 or current WPUs		45,600
Local Discretionary Block Grant	\$41		23,409
Interventions-Student Success	\$22 per K-12 WPU \$90 per ELL student		12,561
			-
Special Populations			
At Risk Regular Program	\$6 per total prior year WPUs; OR If new, \$6 X C35 or current WPUs		3,600
Gifted and Talented	\$4 per K-12 WPU		2,284
Other			
School Land Trust Program	\$39 per student		25,272
Reading Achievement Program	\$19 per total prior year WPUs \$3 per K-3 student		11,400
	\$42 per low income student		864
			-
Charter Administrative Costs	\$62 per student		40,176
Local Replacement Dollars	Average \$1,021 per student		662,629
Total Non-WPU			\$ 1,166,530
One Time			
Teacher Materials/Supplies	\$360 or \$285 per teacher (K-6) ¹ \$310 or \$235 per teacher (7-12) ²	20 6	5,700 1,410
ADM costs (ongoing & one-time)	\$393 - \$10 Tooele Local Rplcement	648	248,184
Library Books and Resources	\$3 per student	649	1,947
Total One Time			\$ 257,241
ESTIMATED Total All State Funding			\$ 3,248,352
¹ Steps one through three get \$360; steps four or higher get \$285			
² Steps one through three get \$310; steps four or higher get \$235			
Questions: Call Cathy Dudley @ 538-7667			Updated 04-17-07

Revenue Projection

FY 2011-2012

	Average Daily Membership	Rating Factor		WPU Generated
Estimated ADM (K)	72		0.55	39.6
Estimated ADM (1-3)	216		0.9	194.4
Estimated ADM (4-6)	216		0.9	194.4
Estimated ADM (7-8)	144		0.99	142.56
Estimated ADM (9-12)	0		1.2	0
Special Ed Pre-School	0			
Special Ed ADM (K)	1			
Special Ed ADM (1-12)	62			
Special Ed (Self-Contained)	1			
Number of Teachers (K-6)	20			
Number of Teachers (7-12)	6			
WPU Value	\$2,616			
Prior Year Teacher FTE (CACTUS)	26			
Prior Year WPUs	600			
ELL Students	0			
Low Income Students-prior year	0			

Assuming 2% increase over prior year

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	570.9600	\$ 1,493,383
Professional Staff	0.03800	21.6965	56,749
Restricted Basic School:			
Special Ed--Add-on	1.0000	63.5500	166,219
Spec. Ed. Self-Contained	1.0000	1.0000	2,616
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$215 per K-8 ADM		139,320
Total WPU Programs		657.2065	\$ 1,858,287
Non-WPU Programs			
Related to Basic Programs:			
SS & Retirement	\$ 478.07 per WPU		\$ 314,191
Quality Teaching Block Grant	\$944 per CACTUS prior year teacher FTE OR, if new, use current teacher FTE		24,544
	\$76 per total prior year WPUs; OR If new, \$76 X C35 or current WPUs		45,600
Local Discretionary Block Grant	\$41		23,409
Interventions-Student Success	\$22 per K-12 WPU \$90 per ELL student		12,561
			-
Special Populations			
At Risk Regular Program	\$6 per total prior year WPUs; OR If new, \$6 X C35 or current WPUs		3,600
Gifted and Talented	\$4 per K-12 WPU		2,284
Other			
School Land Trust Program	\$39 per student		25,272
Reading Achievement Program	\$19 per total prior year WPUs \$3 per K-3 student		11,400
	\$42 per low income student		864
			-
Charter Administrative Costs	\$62 per student		40,176
Local Replacement Dollars	Average \$1,021 per student		662,629
Total Non-WPU			\$ 1,166,530
One Time			
Teacher Materials/Supplies	\$360 or \$285 per teacher (K-6) ¹ \$310 or \$235 per teacher (7-12) ²	20 6	5,700 1,410
ADM costs (ongoing & one-time)	\$393 - \$10 Tooele Local Rplcement	648	248,184
Library Books and Resources	\$3 per student	649	1,947
Total One Time			\$ 257,241
ESTIMATED Total All State Funding			\$ 3,282,058
¹ Steps one through three get \$360; steps four or higher get \$285			
² Steps one through three get \$310; steps four or higher get \$235			
Questions: Call Cathy Dudley @ 538-7667			Updated 04-17-07

Excelsior

Start-up Budget

Purchased Professional and Technical Services (300)

Board, Founding Member & New Staff Prof. Development	20,000
Part Time Consultant - Hire Staff, Program Development, etc.	30,000
Bus. Services, Charter Dev, Accounting Setup, Financial Svces	10,000
Marketing Materials, brochure development, etc.	4,000
Prof. & Legal Services - Articles of Inc., 501c3, Bylaws, etc.	1,000

Other Purchased Services (500)

Research & Development - Visiting other schools, etc.	2,000
Community Meetings - Advertisement, Hall rental, etc.	1,000

Supplies & Materials (600)

Classroom & Office Start up supplies	10,000
Software - Food program, Microsoft, Networking	10,000

Property (700)

Technology - Laptops, Desk Tops, Servers	25,000
Textbooks & Instructional Materials (non-consumable)	20,000
Classroom Equipment (tables, chairs, etc.)	50,000
Library	10,000
Kitchen Equipment	15,000

Total Estimated Start-up Costs 208,000

SOURCES

Federal Start-up Funds (or donations/loans)	100,000
State Loan Program (or personal loan/donations)	<u>108,000</u>
Total sources	208,000

Excelsior

Budget Feasibility

	Worst Case		Best Case		Most Likely		Key Info.	
Revenues							Retirement Contribution 7%	
WPU	1,791,537	56%	1,791,537	52%	1,791,537	54%	Health Benefit per FTE \$5,500	
Non WPU/One Time	1,391,790	44%	1,391,790	40%	1,391,790	42%	Enrollment 648	
Federal Facilities	-	0%	20,000	1%	10,000	0%	Position Salary	
Federal Startup	-	0%	100,000	3%	50,000	1%	Director 62,000 1	
USDA Lunch/Bfast	-	0%	110,000	3%	80,000	2%	Teachers 36,000 26	
NCLB Title Funds	-	0%	35,000	1%	17,000	1%	Aides 8,350 26	
Other/Donations	500	0%	10,000	0%	5,000	0%	Asst Director 38,000 1	
	3,183,827	100%	3,458,327	100%	3,345,327	100%	Secretary 30,000 1	
							Receptionist 22,000 1	
							Spec Ed / ELL 40,000 2	
Expenses								
Labor								
Director	62,000		62,000		62,000			
Teachers	936,000		936,000		936,000			
Asst. Director	38,000		38,000		38,000			
Secretary	30,000		30,000		30,000			
Receptionist	22,000		22,000		22,000			
Sped Ed/ELL	80,000		80,000		80,000			
Aides	217,100		217,100		217,100			
Retirement	81,760		81,760		81,760			
FICA/SUTA/WCF	138,510		138,510		138,510			
Health/HRA/COBRA	<u>319,000</u>		<u>319,000</u>		<u>319,000</u>			
Total Labor	1,924,370	60%	1,924,370	56%	1,924,370	58%		
Supportive								
Administrative	12,000		12,000		12,000			
Business Services	54,000		54,000		54,000			
Food Program Exp.	-		90,000		70,000			
Insurance	19,664		19,664		19,664			
Office	5,000		5,000		5,000			
Subs	15,000		15,000		15,000			
Maint/Janitorial	80,000		80,000		80,000			
Prof & Legal	10,000		6,000		6,000			
Prof Development	60,000		60,000		60,000			
Supplies/Curriculum	150,000		150,000		150,000			
Other	13,000		13,000		13,000			
Utilities	50,000		50,000		50,000			
Total Support	468,664	15%	554,664	16%	534,664	16%		
Gross Income								
	790,793	25%	979,293	28%	886,293	26%		
Facility								
	(675,944)	-21%	(675,944)	-20%	(675,944)	-20%		
Surplus								
	114,849	4%	303,349	9%	210,349	6%		
ADM Safety Margin								
	26		67		47			

Excelsior

Pro Forma Budget Narrative & Notes for MOST LIKELY scenrio

Revenues

WPU	1,791,537
Non WPU	1,398,499
Federal Facilities	10,000
Federal Startup	50,000
USDA Lunch/Bfast	80,000
NCLB Title Funds	17,000
Other/Donations	5,000
	<u>3,352,036</u>

Calculated using funding worksheet provided by USOE

Federal Funds available to the school based on the successful completion of a competetive application process

USDA Lunch Reimbursements + Lunch Sales to Students

Estimate based on approx. Free & Reduced Students in area

Expenses

Labor

Director	62,000
Teachers	936,000
Asst. Director	38,000
Secretary	30,000
Receptionist	22,000
Sped Ed/ELL	80,000
Aides	217,100
Retirement	81,760
FICA/SUTA/WCF	138,510
Health/HRA/COBRA	176,000
Total Labor	<u>1,781,370</u>

26 Teachers at an average salary of \$36,000
--

2 Spec Ed. Teachers at average salary of \$40,000

1 aide per class, 5 hours per day, \$10/hour, 167 days
--

Calculated at 7% of full time salaried employees
--

Calculated at 10% to cover FICA, Workers Comp. Etc.

\$5,500 per eligible employee with HRA incentive
--

Supportive

Administrative	12,000
Business Services	54,000
Food Program Exp.	70,000
Insurance	19,664
Office	5,000
Subs	15,000
Janitorial/Maint.	80,000
Prof & Legal	6,000
Prof Development	60,000
Supplies/Curriculum	150,000
Other	12,000
Utilities	50,000
Total Support	<u>533,664</u>

Risk Management at \$18 per student + Building + D&O
--

Gross Income 1,037,002

Facility	(650,000)
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\$13 per square foot/ 50,000 square foot building/ per local developer & construction company

Surplus 387,002

Excelsior

4 Year Cash Flow Using Most Likely Scenerio

	Planning Year	Year 1	Year 2	Year 3
CASH SOURCES				
State Allotment		3,183,327	3,248,352	3,282,058
Borrowed Funds	105,000			
Federal Facilities		10,000		
Federal Startup	100,000	50,000	50,000	
USDA Lunch/Bfast		80,000	90,000	100,000
NCLB Title Funds		17,000	17,000	17,000
Other/Donations	10,000	5,000	5,000	5,000
Total Cash In	215,000	3,345,327	3,410,352	3,404,058
CASH USES				
Payroll		1,385,100	1,412,802	1,441,058
FICA/SUTA/WCF		138,510	141,280	144,106
Retirement		81,760	83,395	85,063
Health/HRA/COBRA		319,000	325,380	331,888
Administrative		12,000	12,000	12,000
Business Services	10,000	54,000	54,000	54,000
Food Program Exp.		70,000	75,000	80,000
Insurance		19,664	20,057	20,458
Office		5,000	6,000	7,000
Subs		15,000	17,000	20,000
Maintenace		80,000	90,000	100,000
Prof & Legal	1,000	6,000	8,000	10,000
Prof Development	20,000	60,000	70,000	80,000
Supplies/Curr/software	40,000	150,000	150,000	150,000
Other		13,000	15,000	20,000
Utilities		50,000	50,000	50,000
Part Time Consultant	30,000			
Library	10,000			
Marketing/Advertisement	5,000			
Technology Equipment	25,000			
Furniture Fixtures & Equip	50,000			
Research & Development	2,000			
Kitchen Equipment	15,000			
Debt Service	5,000	100,000		
Interest	1,000	5,000		
Building Lease Payment		650,000	650,000	650,000
Total Cash Out	214,000	3,214,034	3,179,915	3,255,573
Net Cash	1,000	131,293	230,438	148,485
Cash Reserve for Building Purchase	1,000	132,293	362,731	511,216

Excelsior

Business Plan Summary & Scoring

Applicant provides clear and complete operational budget (1 planning and 3 operational years).

Both the State Budget as well as the Four Year Cash flow show 1 planning and and 3 operational years of financials.

Budget is balanced, uses reasonable revenue projections, and is inclusive of all operational costs, and shows a significant net increase each year.

All budgets were developed to include a safety margin and surplus.
Revenue projections rely wholly on state approved funding worksheets and only MSP.
Operational budget developed using actual expenses from similar charter schools.
Four Year Cash flow shows increases in operational costs based on historical CPI.

Budget uses appropriate categories and includes clear detail for understanding.

Categories have been designed to match USOE chart of Accounts. Also included are notes to the financial statements which promote understanding of calculations and budget detail.

Budget includes clear and realistic detail of ongoing M&O costs.

Ongoing Maintenance and Operation costs have been taken from the financial statements of similar size charter schools to ensure their realism. The final budget was compared to a number of existing schools that have been financially viable for several years. This not only helps to ensure the integrity of Excelsior figures, but also ensures not M&O costs were overlooked.

Budget addresses facilities in a realistic way by including clear detail regarding the source of their information.

Facilities figures rely on two factors, 1) ensuring the size of the facility is realistic and 2) ensuring the cost of construction/lease payment is within market range. The first factor was developed using actual charter school building floor plans and adding sufficient classrooms to accommodate 3 classes per grade at Excelsior. The second factor came from a survey of charter facility development companies including US Charter and Charter Holdings. Thus Excelsior plans on a 48,000 to 50,000 square foot facility at a monthly lease price of approximately \$13 per square foot annual lease costs (which includes local land prices in Tooele).

Budget does not rely on any funds other than MSP

Although some schedules do include other income sources, the Excelsior budget does NOT rely on any funds other than MSP.

Applicant provides clear and complete cashflow statements (3 operational years which is clearly aligned with the mission of the school).

We have included a Four year Cash Flow Statement (including 1 planning year and 3 operational years). The cash flow includes a number of figures specific to the mission of Excelsior. These include extra expenses for different curriculums to promote level learning, Instructional assistants in every classroom to promote smaller student-teacher ratios and Professional Development costs to ensure staff is well trained in curriculum.

Section 7

Fiscal Procedures



EXCELSIOR
ACADEMY
ENGAGE › ENCOURAGE › EXCEL

Fiscal Procedures

Excelsior Academy will develop an accounting manual which will be approved in an open board meeting. This manual will detail the financial policies and procedures of the school. These policies and procedures will comply with all federal and state regulations, protect Excelsior's assets and help to ensure that timely and accurate financial information can be provided. Excelsior Academy will require the school's business administrator to attend Utah State Office of Education (USOE) School Finance & Statistics training as soon as it is available after their hire date.

Budget Process: Excelsior will develop a yearly budget using the USOE chart of accounts in accordance with the vision and mission of the school. Budgeted expenditures will not exceed expendable revenue. The Director, Staff and Professional Counsel will all take part in creating the budget. Budgets will be approved and amended if necessary in open board meetings. A draft budget will be reviewed in the April Board Meeting and a final Budget approved at the May Board Meeting

Limits on Appropriations: Appropriations will be made only as authorized by the approved budget. No appropriation can be approved which exceeds current market value or would create a budget deficit. Excelsior will require a properly signed Expense Requisition as authorization for the expenditure of funds. Requisitions will require proper source documentation and be checked against the budget before funds are distributed. Final approval will require two signatures, one of which must be a member of the Excelsior Board. The Business Manager for the school will monitor appropriations and make a monthly accounting to the board.

Budget Reports: Accounts will be closed and reconciled on a monthly basis. After reconciliation, monthly budget reports showing total expenditures and budget amounts remaining will be provided to the Board of Trustees and the School Director. Required monthly financial reports will also be provided to the State Charter School Board staff.

Expendable Revenue and Undistributed Reserve: As part of the budgeting process, the Board and qualified financial advisors will determine annual operating safety margins. A financial reserve will be created to ensure the school's continued solvency. Undistributed reserves may be used when approved in an open board meeting. Expendable revenue and undistributed reserves must be used to further the vision and mission of Excelsior Academy.

Inter-fund Transfers: The Board may approve inter-fund transfers in an open board meeting.

Emergency Expenditures: Emergency expenditures may be approved by the School Director or a member of the Finance Committee (consisting of the Director, Business Manager and one board member) and must be justified in the next calendared open board meeting.

Purchasing Policies and Procedures: Excelsior will follow at a minimum the State of Utah Purchasing Policies and Procedures until such time as the school's accounting manual shall be adopted and approved in an open board meeting.¹⁰ Expenditures over \$3,000 will require at least 3 bids. Expenses over \$50,000 will require a formal closed bidding process or Request for Proposal (RFP). Excelsior will adhere to Utah Statute 63-56-410 regarding "Circumstances justifying award of contract without competition".

¹⁰Insert 7-1 Excelsior Board Meeting Minutes

Minutes

**Excelsior Academy Board Meeting
The Oaks Club House
November 14, 2007
8:30 pm**

Present: Ann Gubler, Brenda Spearman, Cathy Evans, Ali Brown, Sarah Natividad, Mack Stoddard, Monty Hardy, Susan Hardy, Ruth Dunn, Heather McClatchey, Susan Whitmer, Marti Hawker, Heidi McCabe, Vincent Natividad

Welcome: Heather McClatchey

- 1. Read through the Fiscal Procedures section.**
 - a. Add to that section that the Director or Financial Manager will take the USOE Finance and statistics training prior to working with the school as soon as it is offered.**
 - b. Vote to approve the Fiscal Procedures section with the one change. Motion to approve by Ruth Dunn, seconded by Ann Gubler, unanimous vote in favor of approval.**
- 2. Contact Shelly and Jennifer regarding Terms and Conditions of Employment.**
 - a. Monty will send information from recent training on Terms and conditions.**
- 3. Ann will send the rest of the lesson plans, the 5th grade plan needs to be shortened**
- 4. Background information sheet and other information will be sent to all board members who haven't submitted it. (Heather will do)**
- 5. All present went through the entire Charter to edit and ask questions. Many corrections were made and will be transferred to the original document by Heather.**

Motion to adjourn by Ruth Dunn, seconded by Terry Hancock (10:21 pm)

Section 8

Organizational Structure and Governing Body



EXCELSIOR
ACADEMY
ENGAGE › ENCOURAGE › EXCEL

Founding council

The founding council will consist of six members who are responsible for the charter application process and will become the original Board of Trustees when the charter is approved by the State.

Board of Trustees

Number, Election, and Tenure for board members

The number of trustees on the Board of Trustees at Excelsior Academy shall be at least five and no more than seven; 25% of which must be parents of current students. The Parent Teacher Organization President elected by the parents of Excelsior students will serve as a member of the Board of Trustees.

The initial developmental board members (those who join the board in the first year of the development of the school) may be re-elected by a majority of the parents and Board of Trustees with no term limits. The initial term for trustees is: Chairman and Treasurer 3 years, Vice Chairman and Secretary 2 years.

New trustees will be nominated and elected through an open meeting/election with voting members being the parents of current students as well as the current Board of Trustees. They will serve a two-year term, with a two term limit.

The Board of Trustees reserves the right to relieve/replace a member through a super majority vote (5 to 2 or greater of all current trustees) in instances where it feels the member is not following the vision and mission of Excelsior Academy.

Trustees may resign at any time by giving a written notice, either by paper or electronic copy, to the chair of the Board of Trustees at Excelsior Academy. The resignation will take effect at the time specified. The Board will announce the vacancy and then consider nominations from parents. Vacancies will be filled by a majority vote of trustees in office and the new trustee will fulfill the remaining term of the trustee replaced. This time served if less than one year, on the Board of Trustees will not be considered a full term and will not count toward the two term limit for trustees.

Number of Officers and Qualifications

The Board of Trustees shall elect amongst themselves officers to help govern the organization. Excelsior Academy Board of Trustees shall have a Chair, Vice Chair, Secretary and Treasurer. The Board of Trustees may appoint or elect additional officers as needed. (Assistant Officers, additional Vice-Chairs, Assistant Secretary and Assistant Treasurer...)

Election and Term of Office

Officers for Excelsior Academy shall be elected by the Board of Trustees at the annual meeting held in June. Officers will hold office for a two-year term.

Any officer can be removed from office by a majority vote (4 to 3 or greater).

Any officer may resign by written notice, either electronic or paper, to the Board of Trustees or the Chair. The resignation will take effect at the time specified. Any vacancies will be filled by the Board of Trustees to the end of the term.

Duties of the Officers:

Chairperson-The chair must follow, and assure others follow, Board Policy and all Federal and State Open Board Meeting laws that apply. The Chair of the Board of Trustees shall preside at all meetings in accordance with Board Policy, applicable laws (Utah State Code 52-4, Federal Law 94-409) and follow Parliamentary Procedure.

Other duties include, but are not limited to, the following:

- Determine agenda with the assigned school coordinator/administrator,
- Sign contracts and other instruments on behalf of the Board, but only if so authorized by the Board,
- Appoint a member to act as Secretary when the Board's assigned Secretary is absent,
- Appoint Board subcommittees and assign a chairperson,
- Appoint Board members to represent the Board with government offices, organizations, or school districts,
- Select members of advisory committees to the Board, in consultation with the Board,
- Present the Board a roster of Board subcommittees and advisory committees at the annual organizational meeting so the Board can determine if continuation is desired or necessary,
- Cancel and/or reschedule Board meetings for good cause after consultation with Board members and the school coordinator/administrator,
- Direct the school coordinator/administrator to call special meetings and/or emergency meetings of the Board, as necessary,
- Maintain communication with the school coordinator/administrator, as needed.

[Note: The Chair of the Board shall have such other powers and duties as the Board may from time to time determine.]

Vice Chair:

The Vice Chairperson shall have the powers and duties of the Chairperson during his/her absence or disability, and shall have such other powers and duties as the Board may from time to time determine and assign.

Secretary:

The Secretary shall record or cause to have recorded the minutes of all organizational, regular, special Board meetings, and any non-public sessions. Procedures for recording minutes are outlined as follows:

- Record all votes at Board meetings by last name, except unanimous votes may be recorded as such,
- Record in the minutes of all public meetings and other proceedings the full names of members and persons appearing before the meeting (persons in the audience do not need names recorded),
- Record a brief description of the subject matter discussed,
- Record final decision(s) of any Board action,
- Provide draft minutes for public inspection, so labeled, within required timelines,
- Make any corrections to the draft minutes that may be necessary following the Board meeting where minutes are reviewed and approved,
- Sign the final copy with any adjustments after acceptance by the Board, and return original, approved copy to the school's administrative office for filing in the permanent school record.

[Note: The Secretary shall have such other powers and duties as the Board may from time to time determine.]

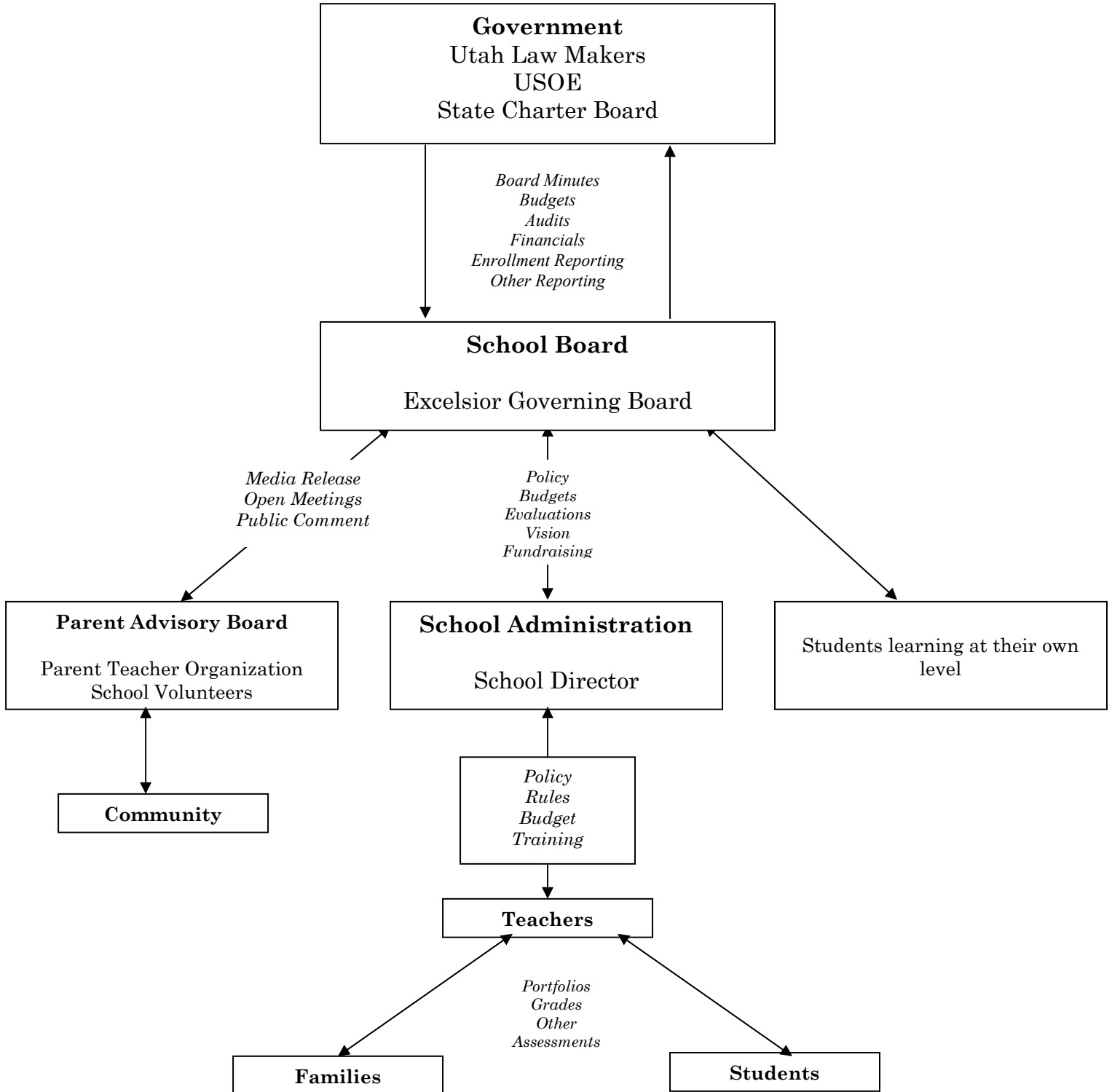
Treasurer:

The Treasurer is responsible for the deposit and maintenance of accounts for all monies belonging to the Excelsior Academy Board of Trustees and will be the custodian of all financial records for the Excelsior Academy Board of Trustees.

Excelsior Academy

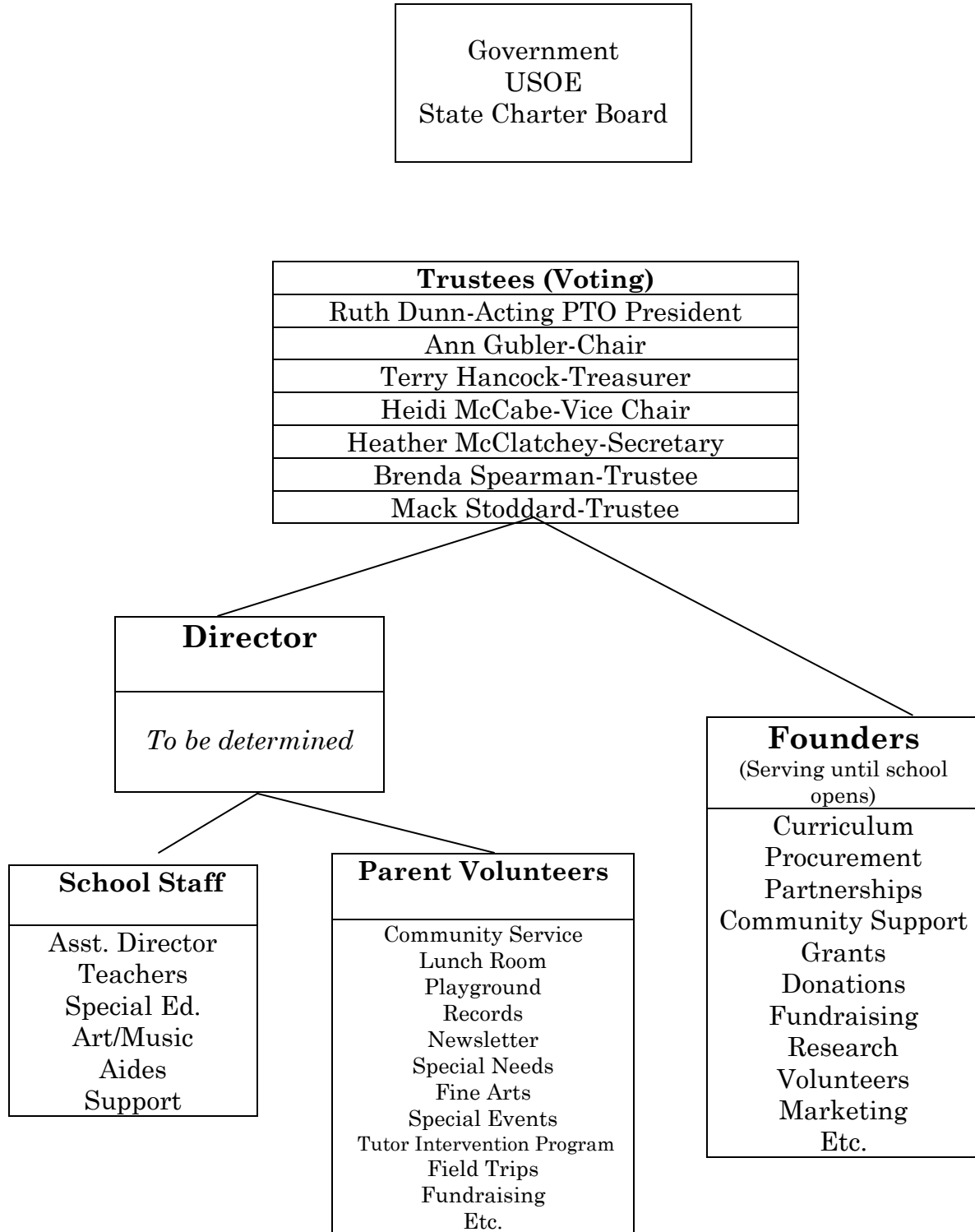
Flow of Information

To Stakeholders



Excelsior Academy

Organizational Flow Chart



Section 9

Background Information and Resumes

Ruth Dunn	page 42
Ann Gubler	page 47
Heidi McCabe	page 52
Heather McClatchey	page 58
Terry Hancock	page 63
Brenda Spearman	page 69
Mack Stoddard	page 74



EXCELSIOR
ACADEMY
ENGAGE › ENCOURAGE › EXCEL

Background Information

Please provide the following information on the authorized agent, each governing body member, and any individuals responsible for the day-to-day operation of the school. A resume for each individual is also required. This page may be copied as many times as necessary.*

Name Ruth Hamilton Dunn

Role in School (list positions with school) Member, Board of Directors

Employment History:

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

After attaining a Bachelor of Science in Accounting, I worked for KPMG Peat Marwick. While there I had the opportunity to work with a diverse group of clients from financial institutions to manufacturing and government entities in both the audit and consulting services. From KPMG I moved to a regional firm specializing in bankruptcy and litigation support where I managed all aspects of various businesses where the court appointed us as Trustees or as accountants to the Trustee. After moving to Tooele, I joined my husband's publishing and printing family business as assistant controller and have held that position for the past 15 years.

My experience in developing academic programs developed by accident nine years ago as I realized my extremely bright daughter of five was dyslexic. During the next five years I read, studied, attended educational training seminars, and purchased many curriculums. As my knowledge grew, I organized various educational co-ops from the ground up and assisted other parents in their educational needs. My daughter and my first son entered public school over four years ago, and since then I have turned my attention to helping their public schools with educational goals. I have volunteered on an almost daily basis. I have helped develop gifted and talented programs and curriculum, worked with advanced and remedial English students, advanced Math and Pre-Algebra, etc. I am currently the Chairperson of the Community Council for my children's elementary school. I have found that I have a passion for helping children achieve success at their level, whether they need remedial or advanced assistance. I live to see their eyes light up and their confidence increase when they see they can "get it". I hope to be able to share this passion and experience with all the administrators, teachers, parents, and students at Excelsior Academy.

Education History:

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

Brigham Young University
Bachelor of Science, Accounting
Minor Economics

Passed CPA Exam in 1993

Statement of Intent:

Using as much space as necessary below, provide a personal statement regarding your role and commitment to this application as it has been written.

I have always loved learning. I still remember my first reading lesson in 1st Grade. It was with a Sally, Dick, and Jane reader. The first page had "Go". The second page had "Go. Go. Go." The third was "Go Spot. Go." I was gone....on a path of life-long love of learning. I also remember my deepest desire in 7th Grade was to attend an all girls boarding school where we wouldn't have to deal with all the bothersome boys, and the whole day could be spent learning. (I shared this with a girlfriend, and got that "What planet are you from?" look and kept my mouth shut about that dream after that!) It wasn't until I became a parent almost fourteen years ago that I began to know the joy of helping children discover that excitement and love of learning. I've seen it happen so many times when a child is taught at his or her level of ability and allowed to progress at the speed she or he is capable of. I desire this for all children. I have worked very hard to implement programs in my children's schools, but I feel an entire school dedicated to this vision would be a beacon and model for all our schools. I would love the opportunity to assist in any way I can. In this application, I have spread my involvement mostly over the financial, market, and curriculum areas.

*The information and resume provided will be subject to verification by the board.

Ruth H. Dunn

818 Clifford Drive, Tooele, UT 84074

(435) 882-6202

EDUCATION: Bachelor of Science, Accounting, Minor Economics
Brigham Young University, Provo, Utah (1988)

WORK EXPERIENCE: **Assistant Controller**, (1993-Present) Transcript Bulleting Publishing Co. Inc., Tooele, Utah. Assist controller in various aspects of finances for 100+ year-old family owned printing and publishing company.

Senior Accountant, (1991-1992) Nelson Elggren Durkin, Salt Lake City, Utah. Specialized in litigation support, bankruptcy, and forensic accounting. Directed finances of court appointed bankruptcies.

Auditor, (1989-1991) KPMG Peat Marwick, Salt Lake City, Utah. Worked as a staff accountant and an in-charge accountant on various clients from financial institutions to manufacturing.

Systems Consultant/Accountant, (1987-1988) Dixie Interiors, St. George, Utah. Complete and continue with requirements, specification, definition, design, implementation, and maintenance of an accounting system for a retail furniture company.

CERTIFICATION & TRAINING

- Passed CPA Exam
- Riggs: Reading & Writing Road to Spelling & Reading
- STAR Tutoring Program

VOLUNTEER

- Organized, directed, and taught in a private co-op school, Valor Hall, for three years.
- Taught Shurley grammer in public school grades 3rd thru 6th for three years.
- Created a Gifted & Talented program the elementary school level.
- Organized and taught accelerated math groups at the 6th grade level.
- Directed leveled reading groups at the elementary school level.

Background Information

Please provide the following information on the authorized agent, each governing body member, and any individuals responsible for the day-to-day operation of the school. A resume for each individual is also required. This page may be copied as many times as necessary.*

Name Ann Hamilton Gubler

Role in School (list positions with school) Chairman, Board of Directors

Employment History:

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

For the past 10 years, I have operated most of the office management, human resource, and tax responsibilities for our family-owned construction business with operations in excess of 1 million dollars annually. I have volunteered extensively in my children's classrooms. I have been involved with the operations of their elementary and Jr. High schools through serving on community councils and with PTAs. I have attended educational training and conferences at my own expense. I have worked within the Tooele County School District to try to implement improvements in education (Accelerated programs; Gifted and Talented Learning; Mathematics; Grammar). I've operated enrichment programs for the elementary grades (Omnibus, Pre-Algebra, 'Star' Tutoring). I also organized and taught in an education co-op for 3 years (Valor Academy).

Education History:

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

Highland High School (June 1990)

Dixie State College Associate's Degree (August 1991)

I continued my education toward a bachelor's degree but chose to put it on hold to raise my family. I plan on finishing my degree (Zoology, Mathematics, and English Majors) when my children are grown. It's too bad there isn't an official degree for reading more educational books (Mathematics, History, Literature, Architecture, Astronomy, and Reading/writing textbooks and biographies, etc.) than novels for the past 15 years, oh well!

Statement of Intent:

Using as much space as necessary below, provide a personal statement regarding your role and commitment to this application as it has been written.

I feel very strongly about education. My father was a ‘hillbilly’ and my mother was a ‘sheep-herder’s daughter’ (their own words), and they have spent their lives improving their minds and instilling in their children a desire for knowledge and understanding. My father’s example of being the first person in his ancestry to set foot on a college campus and end up earning a doctorate degree has inspired me to reach for knowledge in every available avenue. My mother’s example of dedicating her life to the improvement of her family has focused much of my learning on improving the educational environment for my children and future grandchildren. I’m trying to live up to a wonderful legacy of learning.

I would love to instill this love of learning in all the children that attend Excelsior Academy. I want the students to leave Excelsior ‘culturally literate,’ with a strong foundation of knowledge that will enable them to further their educations throughout their lives. I have experienced the struggles of a class going too quickly or too slowly for my learning abilities and I would like to customize the learning environment at Excelsior to best suit the abilities and pace of each child. I am currently going to my son’s school every day to teach him a separate math curriculum so that he can accelerate his learning (he is on track to finish 7th grade math by the end of 5th grade). There is currently no option for him to do this in the Tooele County School District.

I have done little else in my life since a friend suggested I attend the USOE’s Charter School Introduction Class. After becoming inspired at the meeting, I have organized a large group of parents and the business community to rally together to create an educational option for families in Tooele. Before this all started, I was in the process of building my own home in May, and it has largely been put on hold. I’m quite committed and very excited for this opportunity!

*The information and resume provided will be subject to verification by the board.

Ann Hamilton Gubler

Professional Experience

6/1997 to Present Straight Edge, Incorporated Tooele, Utah

Corporate Secretary – Part-Time

- Human Resource Management including payroll.
- Office Management (including Accounts Receivable in excess of 1 million dollars per year).
- Purchasing responsibilities in excess of \$100,000.
- Corporate decisions for the direction of the company.

6/1992 to 1/1997 Signal Peak Orthodontics St. George, Utah

Office Manager, Orthodontic Assistant

- Assisted the dentist and trained additional assistants in all aspects of orthodontic care.
- Managed patient files, and office supplies.
- Oversaw sterilizing and cleaning operations for multiple offices.
- Set-up much of the operations for a satellite office including auditing and organization of previous dentist's accounts receivable.
- Researched and recommended software programs for professional offices. Oversaw operations to transfer daily procedures to computers.

6/1984 to 6/1992 Dr. J.V. Hamilton, D.M.D. St. George, Utah

Office Manager, Dental Assistant – Part-Time

- Assisted dentist.
- Oversaw sterilizing and cleaning operations.
- Assisted with office duties.
- Billing of accounts receivable, and insurance.

Education

8/1990 to 8/1991 Dixie State College St. George, Utah

Associate of Science

- Dean's List
- Honors Degree

Training

- Riggs: Reading & Writing Road to Spelling & Reading
- STAR Tutoring

Volunteer experience

I organized, hosted and taught Valor Hall Academy, a private school co-op. I've presented Grammar and Phonics lessons yearly in my children's classrooms, I've organized and run Gifted and Talented pull-out programs, and I've taught a pull-out Pre-Algebra class at the elementary school level. STAR Program Coordinator at the elementary school level.

Background Information

Please provide the following information on the authorized agent, each governing body member, and any individuals responsible for the day-to-day operation of the school. A resume for each individual is also required. This page may be copied as many times as necessary.*

Name Heidi McCabe

Role in School (list positions with school) board of directors Trustee

Employment History:

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

I have been managing family quilts (a small family business) since I started being a part of the business. I have become a long arm machine quilter, paid taxes, bought inventory, balanced savings and checking and always kept money in both, and also made sure that those in the family that worked received pay.

For a time I provided a small in-home daycare with no more than 4 children in my home, I held contracts with parents, managed the money, and took care of all taxable right offs, and purchasing that was needed. I managed and would keep emergency and safety information updated regularly. I planned the scheduling and care of these children, while teaching preschool skills and planning community outings often.

I was the assistant to the school councilor of Parkside elementary school, in Murray. I organized, and would, under the councilor's direction, lead small groups. I also did some receptionist duties, while working as her assistant, I was often called in as a substitute teacher, and also filled in as a substitute for the in-school suspension program.

I served as a stipend intern and then teacher aide for Valley Mental Health, in the Carman B. Pingree School for children with Autism. I worked in the preschool and then the 1st grade. I was the primary teacher over a portion of the children in the classroom, and helped in writing each child's Individual Education Plan (IEP), led large and small groups, individual instruction, and planned field trips. Participated in staff meetings, Human Rights meetings, and worked well with those around me.

In each individual employment, I have either learned a lot about the education system, the important things about how it is run or what can be done to improve on it, or I have learned about how children individually learn so differently, and I have learned how to work with others, in an employer status, and as a person who is the responsible party.

Education History:

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

I studied my general education at Salt Lake Community College 1998-1999, I then continued on to study areas related to a special education degree at the University of Utah, Spring of 2000. I specifically remember my Human Exceptionality and Multicultural education classes. In these classes I had service learning assignments. For service learning, I volunteered at the Salt Lake City Boys and Girls Club located in Sugarhouse, I was also able to work with one child individually in my neighborhood, which took me to observing in the Washington Elementary Open classroom.

Statement of Intent:

Using as much space as necessary below, provide a personal statement regarding your role and commitment to this application as it has been written.

Education is very important to me, especially for the children of our future. I stand behind the goals that this charter has been setting with accelerated and leveled learning and want to continue to help in the success of this charter and future school.

Through my employment and education I have been able to observe a number of children in different learning environments.

I have a strong conviction to support children being taught by those who love to teach and in a variety of ways that will help children to learn experience and love learning themselves.

*The information and resume provided will be subject to verification by the board.

HEIDI MCCABE

1751 N. Anson Dr.
Tooele, UT 84074

heidi.mccabe@excelsior-academy.org

(435) 578-8041 (H)
(801) 487-5863 (M)

Summary of Qualifications

I AM A DYNAMIC INDIVIDUAL WITH A PASSION FOR BETTERING THE LIVES OF MY CHILDREN AND THE COMMUNITY IN WHICH WE LIVE. I OFFER MANY QUALITIES THAT ENHANCE MY ABILITY TO PURSUE THIS PASSION, INCLUDING:

- *AN EXTENSIVE BACKGROUND WORKING WITH CHILDREN OF ALL AGES*
- *SUPERB INTERPERSONAL SKILLS DEVELOPED THROUGH YEARS OF SERVICE IN DIVERSE CAPACITIES*
- *DETERMINATION TO TACKLE PROJECTS FROM START TO FINISH WHILE THRIVING IN A LEARNING ENVIRONMENT*
- *ORGANIZATIONAL SKILLS VITAL TO THE SUCCESSFUL COMPLETION OF TASKS LARGE AND SMALL*

Education

UNIVERSITY OF UTAH – *Salt Lake City, UT*

1/00 – 5/00

- Studied Multicultural Education, Human Exceptionality, and other education-related topics
- Completed general education requirements at Salt Lake Community College

Professional Experience

MANAGER, FAMILY QUILTS – *Tooele, UT*

6/99 – Present

- Create machine-stitched, hand-bound quilts for vast array of clients
- Oversee marketing efforts
- purchase supplies for company
- handle all financial matters
- perform basic machine maintenance (e.g., oiling, cleaning)

IN-HOME DAYCARE PROVIDER – *Salt Lake City, UT*

9/01 – 10/05

- Functioned as sole provider of daycare service and preschool for 4 children
- Planned and carried out field trips and other outside activities
- Implemented preschool learning exercises including language, art and motor skills
- Coordinated schedules of children (e.g., napping, eating, etc)
- Managed all financial aspects of business

ASSISTANT TO SCHOOL COUNSELOR, PARKSIDE ELEMENTARY SCHOOL – *Murray, UT*

10/00 – 5/01

- Managed office of school counselor
- Acted as a substitute teacher on occasion
- Assisted in individual and small group student therapy
- Secured and delivered donations for "Sub-for-Santa" program

TEACHER AIDE, VALLEY MENTAL HEALTH – *Salt Lake City, UT*

- Designed Individual Education Plans
- Assisted in integration of students to new schools
- Conferenced with parents about children's' needs
- Performed educational testing for children
- Led the classroom in group activities per school curriculum
- Participated in human rights meetings

Miscellaneous

SECURITY CLEARANCE: SECRET (ACTIVE)

PROFESSIONAL AWARDS:

- *TYBRIN MERIT AWARD (2002)*
- *PEER RECOGNITION AWARD (2004)*
- *TYBRIN AWARD OF EXCELLENCE (2004)*

Background Information

Please provide the following information on the authorized agent, each governing body member, and any individuals responsible for the day-to-day operation of the school. A resume for each individual is also required. This page may be copied as many times as necessary.*

Name Heather McClatchey

Role in School (list positions with school) Secretary, Board of Trustees

Employment History:

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

- 2005-present Self Employed Tupperware Manager
I manage my own home based business. I am responsible for collecting payment, scheduling appointments, purchasing and distributing products.
- 1997-present Homemaker
I am the mother to three wonderful children ages 3, 7 and 10. I am very involved in their education volunteering many hours to support their classes and schools.
- 1996-1997 Interior Designer Ethan Allen Salt Lake City, Utah
I was responsible for scheduling personal design consultation appointments, creating interior design plans, guiding client design choices to meet with the clear vision of the chosen design.
- 1994-1996 Assistant Department Head Eagle Hardware and Garden
Bremerton, Washington, Anchorage, Alaska, Salt Lake City, Utah
I assisted the Kitchen and Bath Department Head in scheduling, inventory and personnel management.

Education History:

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

Falls Church High School	Falls Church, Virginia	1986-1990	High School Diploma
Radford University	Radford, Virginia	1990-1994	Bachelor of Science

Statement of Intent:

Using as much space as necessary below, provide a personal statement regarding your role and commitment to this application as it has been written.

My role in the creation of the Excelsior Academy application has been that of secretary. I have compiled the many pieces of the application to create one cohesive document. I have also researched and written sections of the application to align with the mission and goals of Excelsior Academy.

My desire is to help improve the public education system. I want the best education possible for all three of my children. With the model of education that has been created for Excelsior Academy I feel that they will receive an education tailored to help them excel and explore their many interests.

*The information and resume provided will be subject to verification by the board.

Heather McClatchey

755 East 890 North
Tooele, Utah 84074
Home: 435-843-1341
Cell: 435-840-3821
heather.mcclatchey@excelsior-academy.org

OBJECTIVE

I am a self motivated determined individual. I have been volunteering in the education system for the past 6 years. My goal is to see the system improve and make a positive impact on our students that will continue with them throughout their lives.

EXPERIENCE

- 2005-present Self Employed Tupperware Manager Tooele, Utah**
I manage my own home based business. I am responsible for collecting payment, scheduling appointments, purchasing and distributing products.
- 2002-present Education Volunteer Middle Canyon Elementary/St. Marguerite's Catholic School Tooele, Utah**
I have held many roles volunteering in my children's education. I have tutored reading in the classroom as well as structured programs such as I CAN READ and the STAR program. I was the Parent Teacher Association (PTA) Secretary 2002-2003 and the President from 2003-2004. I am the Co-Chair of Middle Canyon Elementary Holiday Gift and Craft Fair which successfully raises money for the PTA and school.
- 1997-present Homemaker**
I am the mother to three wonderful children ages 3, 7 and 10. I am very involved in their education volunteering many hours to support their classes and schools.
- 1996-1997 Interior Designer Ethan Allen Salt Lake City, Utah**
I was responsible for scheduling personal design consultation appointments, creating interior design plans, guiding client design choices to meet with the clear vision of the chosen design.
- 1994-1996 Assistant Department Head Eagle Hardware and Garden Bremerton, Washington, Anchorage, Alaska, Salt Lake City, Utah**
I assisted the Kitchen and Bath Department Head in scheduling, inventory and personnel management.

EDUCATION

- 1990 High School Diploma** Falls Church High School Falls Church, Virginia
1994 Bachelor of Science Radford University Radford, Virginia
Major: Interior Design, Minor: Art

Background Information

Please provide the following information on the authorized agent, each governing body member, and any individuals responsible for the day-to-day operation of the school. A resume for each individual is also required. This page may be copied as many times as necessary.*

Name Terry Hancock

Role in School (list positions with school) Board of Directors

Employment History:

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

Professional Qualifications

- Experienced executive with over 12 years of managerial experience
- Experience in managing all aspects of a business to include people, programs, budgets, strategy, etc.
- Currently the general manager of a base operations contract with annual revenues of 12 million dollars.
- Experienced in interpreting, applying, and ensuring compliance with contracts and regulations including the FAR, EPA, DOT, and OSHA
- Experience in various quality systems to include ISO 9000 and Six Sigma
- Able to develop the relationships necessary to compete in the demanding business environment

Employment History

- **General Manager (Griffin-Albers), 05/29/2006-Present:** Project Manager for a Facilities Engineering contract worth approximately 76 million dollars with 130 FTEs. Responsible for all aspects of the contract to include negotiating change orders, ensuring customer satisfaction, ensuring high past performance ratings, preparing budgets and monitoring performance to budget, monitoring the cash cycle and ensuring timely payment of invoices, negotiating with a CBA (United Steelworkers) and responding to grievances and concerns, planning and directing work, and directing the safety and quality programs. Some key accomplishments include:
 - Thirty percent reduction in OSHA recordable accidents
 - Significant reduction in Cost per accident through aggressive case management
 - Successful implementation of a cost accounting system (Deltek Cost Point) and subsequent upgrades
 - Continued high ratings and praise from the KO, CA, COR, QAEs and key customers on contract performance
 - Establishment of an ISO 9000-compliant quality control system
- **Logistics/Deputy Project Manager (Griffin-Albers), 07/09/2004-02/01/2005:** Manager of five departments: human resources, logistics, supply, finance and housing. Responsible for all aspects

of the financial system. Local manager for the implantation of a cost accounting system (Deltek Cost Point). Responsible to see to the timely submission and payment of invoices. Responsible for the reorganization and assimilation of a subcontractors' supply function into the prime contract. Prepared financial calculations for equitable adjustments. Audited financial systems for fiscal compliance.

- **Technical Services Manager for Griffin-Albers, 03/06/2002-07/09/2004:** Manager of the Environmental, Health, Safety, and Quality Assurance programs for a facilities engineering contractor with a contract that includes conducting minor construction; the maintenance and operation of three water systems, four sewer systems, landfill, and over 400 buildings. Managed two professional employees; conducted safety training; revised and prepared standard operating procedures; planned safety meetings; chairman for safety committee; chairman of the accident review board; conducted industrial hygiene monitoring; response manager for spill response team; prepared reports for work in SWMU; interfaced with other environmental, safety, and health professionals; conducted safety and environmental compliance inspections; managed all hazardous waste to include characterization, labeling, and storage. Prepared health and safety documents for various activities (UGST cleaning, spill cleanup operations, lead-based paint abatement, Consumer Confidence Report, asbestos work, etc.).
- **Technical Services Supervisor (Griffin-Albers), 05/05/1997-08/30/2001:** Supervisor of the Environmental, Health, Safety, and Quality Assurance programs for a facilities engineering contractor with a contract that includes conducting minor construction, the maintenance and operation of three water systems, four sewer systems, landfill, and over 400 buildings. Managed two professional employees; conducted safety training; revised and prepared standard operating procedures; planned safety meetings; chairman for safety committee; chairman of the accident review board; conducted industrial hygiene monitoring; response manager for spill response team; prepared reports for work in SWMU; interfaced with other environmental, safety, and health professionals; conducted safety and environmental compliance inspections; managed all hazardous waste to include characterization, labeling, and storage. Prepared health and safety documents for various activities (UGST cleaning, spill cleanup operations, lead based paint abatement, Consumer Confidence Report, asbestos work, etc.).
- **Senior Associate with Jorgensen Environmental, 01/01/1994-03/01/1997:** Senior supervisor of a full service environmental, safety, and health consulting firm with over 100 clients involved in construction, manufacturing and heavy industry: Responsible for supervising and training associates; conducting training sessions; performing computer modeling of facilities air emissions; preparing reports on environmental emissions, industrial hygiene evaluations and sampling; creating standard operating procedures for health and safety issues; performing facility audits for environmental, and health and safety issues; preparing various governmental reporting documents; and assisting on other specialty tasks as required.
- **Industrial Hygienist for Raytheon Services Nevada, 03/01/1993-09/01/1993:** Industrial Hygienist for the facilities engineering contractor on Johnston Atoll. Raytheon maintained and operated a water plant, sewage plant, and electric plant, and maintained over 50 buildings including a chemical munitions incinerator. Was responsible for establishing a working industrial hygiene program and correcting numerous OSHA violations at the facility's location: Helped computerize MSDS program; worked on respirator, chemical safety, and confined space entry programs; set up sampling programs for heat stress, asbestos, noise, and chemical exposures; worked on an asbestos management and awareness program; participated in an OSHA inspection; evaluated work stations for ergonomic issues; conducted industrial hygiene sampling; conducted training sessions in chemical labeling, spill response chemistry, ergonomics and hazard communication; member of the emergency/spill response team.

Education History:

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

Utah State University

Double Bachelor of Science in Chemistry (Biochemistry emphasis) and Public Health (Industrial Hygiene emphasis)

Graduation Date 1992

University of Utah

MBA

Graduation Date 2005

Statement of Intent:

Using as much space as necessary below, provide a personal statement regarding your role and commitment to this application as it has been written.

Education is a very important part of my life. It has enabled me to accomplish many of my goals and aspirations. A critical element in my progression as an individual is the passion for learning and the knowledge base that I developed during my primary and secondary education. I currently have three children attending local schools. Unfortunately, I do not see my children developing the passion for knowledge that I was instilled with in my youth. My wife and I have tried to work with the teachers and administrators to enhance the learning process. However, many factors have prevented us from achieving our desired goals. I believe that Excelsior Academy will overcome the obstacles we as parents face in ensuring a quality education for our children. To this end I have committed my time and energy in the development and review of Excelsior's charter application. I have provided input into the business plan, curricula and vision. I am committed to see Excelsior succeed not only to benefit my children but everyone that desires an option to the current status quo.

*The information and resume provided will be subject to verification by the board.

TERRY V. HANCOCK

788 East 890 North
Tooele, UT 84074

Phone: (435) 882-6665
Email: eastsidehancocks@yahoo.com

PROFESSIONAL QUALIFICATIONS:

- Experienced executive with over 12 years of managerial experience
- Experienced in managing all aspects of a business to include people, programs, budgets, strategy, etc.
- Currently the general manager of a base operations contract with annual revenues of 12 million dollars.
- Experienced in interpreting, applying, and ensuring compliance with contracts and regulations including the FAR, EPA, DOT, and OSHA
- Experienced in various quality systems to include ISO 9000 and Six Sigma
- Able to develop the relationships necessary to compete in the demanding business environment

EDUCATION:

August 1, 2003-April 25, 2005: Masters of Business Administration from the University of Utah's David Eccles School of Business

September 1, 1987-June 1, 1992: Double Bachelors of Science Degree in Public Health (Industrial Hygiene emphasis) and Biochemistry from Utah State University

EMPLOYMENT:

- **General Manager (Griffin-Albers), 05/29/2006-Present:** Project Manager for a Facilities Engineering contract worth approximately 90 million dollars with 130 FTEs. Responsible for all aspects of the contract to include negotiating change orders, ensuring customer satisfaction, ensuring high past performance ratings, preparing budgets and monitoring performance to budget, monitoring the cash cycle and ensuring timely payment of invoices, negotiating with a CBA (United Steelworkers) and responding to grievances and concerns, planning and directing work, and directing the safety and quality programs. Some key accomplishments include:
 - Thirty percent reduction in OSHA recordable accidents
 - Significant reduction in Cost per accident through aggressive case management
 - Successful implementation of a cost accounting system (Deltek Cost Point) and subsequent upgrades
 - Continued high ratings and praise from the KO, CA, COR, QAEs and key customers on contract performance
 - Establishment of an ISO 9000-compliant quality control system
- **Logistics/Deputy Project Manager (Griffin-Albers), 07/09/2004-02/01/2005:** Manager of five departments: human resources, logistics, supply, finance and housing. Responsible for all aspects of the financial system. Local manager for the implantation of a cost accounting system (Deltek Cost Point). Responsible to see to the timely submission and payment of invoices. Responsible for the reorganization and assimilation of a subcontractors' supply function into the prime contract. Prepared financial calculations for equitable adjustments. Audited financial systems for fiscal compliance.
- **Technical Services Manager for Griffin-Albers, 03/06/2002-07/09/2004:** Manager of the Environmental, Health, Safety, and Quality Assurance programs for a facilities engineering contractor with a contract that includes conducting minor construction; the maintenance and

operation of three water systems, four sewer systems, landfill, and over 400 buildings. Managed two professional employees; conducted safety training; revised and prepared standard operating procedures; planned safety meetings; chairman for safety committee; chairman of the accident review board; conducted industrial hygiene monitoring; response manager for spill response team; prepared reports for work in SWMU; interfaced with other environmental, safety, and health professionals; conducted safety and environmental compliance inspections; managed all hazardous waste to include characterization, labeling, and storage. Prepared health and safety documents for various activities (UGST cleaning, spill cleanup operations, lead-based paint abatement, Consumer Confidence Report, asbestos work, etc.).

- **Technical Services Supervisor (Griffin-Albers), 05/05/1997-08/30/2001:** Supervisor of the Environmental, Health, Safety, and Quality Assurance programs for a facilities engineering contractor with a contract that includes conducting minor construction, the maintenance and operation of three water systems, four sewer systems, landfill, and over 400 buildings. Managed two professional employees; conducted safety training; revised and prepared standard operating procedures; planned safety meetings; chairman for safety committee; chairman of the accident review board; conducted industrial hygiene monitoring; response manager for spill response team; prepared reports for work in SWMU; interfaced with other environmental, safety, and health professionals; conducted safety and environmental compliance inspections; managed all hazardous waste to include characterization, labeling, and storage. Prepared health and safety documents for various activities (UGST cleaning, spill cleanup operations, lead based paint abatement, Consumer Confidence Report, asbestos work, etc.).
- **Senior Associate with Jorgensen Environmental, 01/01/1994-03/01/1997:** Senior supervisor of a full service environmental, safety, and health consulting firm with over 100 clients involved in construction, manufacturing and heavy industry: Responsible for supervising and training associates; conducting training sessions; performing computer modeling of facilities air emissions; preparing reports on environmental emissions, industrial hygiene evaluations and sampling; creating standard operating procedures for health and safety issues; performing facility audits for environmental, and health and safety issues; preparing various governmental reporting documents; and assisting on other specialty tasks as required.
- **Industrial Hygienist for Raytheon Services Nevada, 03/01/1993-09/01/1993:** Industrial Hygienist for the facilities engineering contractor on Johnston Atoll. Raytheon maintained and operated a water plant, sewage plant, and electric plant, and maintained over 50 buildings including a chemical munitions incinerator. Was responsible for establishing a working industrial hygiene program and correcting numerous OSHA violations at the facility's location: Helped computerize MSDS program; worked on respirator, chemical safety, and confined space entry programs; set up sampling programs for heat stress, asbestos, noise, and chemical exposures; worked on an asbestos management and awareness program; participated in an OSHA inspection; evaluated work stations for ergonomic issues; conducted industrial hygiene sampling; conducted training sessions in chemical labeling, spill response chemistry, ergonomics and hazard communication; member of the emergency/spill response team.
- **Laboratory Technician for Utah State University, 06/01/1992-02/28/1993:** Laboratory technician in a molecular biology lab researching methodologies for genetically modifying wheat to allow its cultivation in saline marshlands. Responsible for the daily lab operations. Built tissue culture chambers; operated PCR; conducted ELISA assays, southern blot, and other laboratory techniques to monitor for the assimilation of beneficial DNA markers. Radiological Safety officer responsible for handling and documenting radiological markers used in the laboratory.

Background Information

Please provide the following information on the authorized agent, each governing body member, and any individuals responsible for the day-to-day operation of the school. A resume for each individual is also required. This page may be copied as many times as necessary.*

Name Brenda Spearman

Role in School (list positions with school) Member - Board of Trustees

Employment History:

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

- | | | |
|-------------|--|--------------------|
| 2007 - 2008 | Utah State University Extension
4-H Junior High After-school Program
Assistant Site Coordinator | Tooele, UT |
| | <ul style="list-style-type: none">• Work with 7th and 8th grade students in an after school program three days a week, which includes homework hour and an hour of a 4-H based activity• Work with Site Coordinator to plan and implement 4-H based activities• Tutor and mentor students• Plan and coordinate monthly Family Night Out Activity• Recruit, train and schedule volunteers | |
| 2006 | National MS Society – Utah State Chapter
Development Manager | Salt Lake City, UT |
| | <ul style="list-style-type: none">• Assist in creating a multi-million dollar development budget• Planned and implemented fundraisers and special events including MS Walk and MS 100 Bike Tour• Assisted with strategic planning for the Utah State Chapter• Hired, trained and managed three development employees | |
| 2004 – 2007 | Healing Horses Therapeutic Riding Center
Board Member and Executive Director | Tooele, UT |
| | <ul style="list-style-type: none">• Managed the day to day operations of the organization for two years as Executive Director• Worked to develop policies and procedures• Assisted board in creating a strategic plan and budgets as a board member and Chairman of the board• Finances: budgeting, A/P, A/R, payroll, grant writing, fundraisers, sponsorships and donations• Marketing and PR including advertisements and presentations• Recruit, train, schedule and retain over 50 volunteers and 4 staff members• Increased client numbers from 5 – 40 in two years• Assisted in inviting and training a 13 member board of directors | |
| 2002 – 2003 | Mothers of Multiples
President | Tooele, UT |
| | <ul style="list-style-type: none">• Marketing and PR• Plan monthly activities | |

- | | | |
|-------------|---|--------------------|
| 2000 – 2002 | Community Health Centers
UREACH Program Coordinator/Grant Writer | Salt Lake City UT |
| | <ul style="list-style-type: none"> • Assisted in writing a \$3 million federal grant • Recruited Latino and Native American women to participate in focus groups • Identified core areas to assist underserved populations with infant mortality and wellness • Reported to UREACH Committee made up of professionals representing all areas of the State of Utah | |
| 2000 – 2002 | Intermountain Native American Association
Teen Mentor/Grant Writer | Salt Lake City UT |
| 1997 – 2001 | University of Utah
Financial Specialist – Radiation Oncology
Financial Consultant – Speech, Language and Hearing Clinic
Administrative Secretary – College of Nursing | Salt Lake City, UT |
| 1995 – 1998 | American Red Cross
Instructor/Trainer | Salt Lake City, UT |
| 1994 – 1997 | University of Utah Department of Health
Assistant Health and Safety Program Coordinator
Peer Mentor/Student Director | Salt Lake City, UT |

Education History:

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

Bachelor’s of Science – Social Science, University of Utah, 1991-1992, 1994-1997

Emphasis in non-profit administration including marketing, programming, grant writing and development, and accounting.

Statement of Intent:

Using as much space as necessary below, provide a personal statement regarding your role and commitment to this application as it has been written.

As a child my mother instilled in me the importance of a quality education. She encouraged and supported me through my elementary and secondary education that prepared me for to be successful in achieving a degree in higher education. Times have changed, and over the last few decades the competition and expectations for students entering higher education has increased. I believe that Excelsior Academy will provide its students and most importantly my five young daughters the education, experience and desire to be successful in entering and achieving a degree in higher education. For this reason I am committed to this application and seeing the charter fulfilled and Excelsior Academy open.

I believe that my background, experience and knowledge will help the academy not only become a reality but will assist the school in its future growth and continued commitment to quality education. I am committed as a member of the Board of Trustees to advise and assist in directing the affairs of Excelsior Academy that will allow the school to be financially responsible and fully funded. Thus allowing the staff the full resources needed to provide a quality, productive and inspiring education to all of its students.

*The information and resume provided will be subject to verification by the board.

Brenda Spearman

788 East 540 North

Tooele, UT 84074

435-843-1134

435-840-1966

brendaspearman@yahoo.com

Experience:

2007	Utah State University Extension 4-H Junior High After-school Program Assistant Site Coordinator	Tooele, UT
2006	National MS Society – Utah State Chapter Development Manager	Salt Lake City, UT
2004 – 2007	Healing Horses Therapeutic Riding Center Board Member and Executive Director	Tooele, UT
2002 – 2003	Mothers of Multiples President	Tooele, UT
2002	LDS Hospital Sr. Charge Systems Analyst	Salt Lake City, UT
2001 – 2002	Ingenix Clinical QA Analyst	Salt Lake City, UT
2000 – 2002	Community Health Centers UREACH Program Coordinator/Grant Writer	Salt Lake City UT
2000 – 2002	Intermountain Native American Association Teen Mentor/Grant Writer	Salt Lake City UT
1997 – 2001	University of Utah Financial Specialist – Radiation Oncology Financial Consultant – Speech, Language and Hearing Clinic Administrative Secretary – College of Nursing	Salt Lake City, UT
1995 – 1998	American Red Cross Instructor/Trainer Assistant Health and Safety Program Coordinator	Salt Lake City, UT
1994 – 1997	University of Utah Department of Health Peer Mentor/Student Director	Salt Lake City, UT

Education:

University of Utah Bachelors of Science – Social Science 1997 Salt Lake City, UT
Special Emphasis-Non-Profit Administration

Skills:

- Excellent Communication
- Organized
- Efficient
- Self-directed
- Computer programs – Microsoft Office and QuickBooks
- Budgets and reports
- Work well with deadlines

Background Information

Please provide the following information on the authorized agent, each governing body member, and any individuals responsible for the day-to-day operation of the school. A resume for each individual is also required. This page may be copied as many times as necessary.*

Name Mack Lin Stoddard

Role in School (list positions with school) Trustee

Employment History:

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

Veterans Benefits Administration

Rating Agent

My Job is to apply existing law, to determine validity of claims and percent of disability for veterans. This has prepared me to be able to read and understand Federal laws and regulations and apply them correctly to facts presented to me.

DELTA Airlines

Reservation Sales

This taught me how to find applicable rules and regulations and produce quick, accurate service to customers.

SovCap Inc.

Vice President Far Eastern Development

I worked in Russia developing a free-trade zone. This taught me negotiating skills and how to read and implement a business plan. I brought the project in 2 years early and thousands of dollars under budget.

US Embassy Moscow

Attaché

I learned how to work with a bureaucratic environment and accomplish assigned tasks.

Education History:

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

BA

International Relations/Russian

BYU

MBA

International Business Emphasis

University of Phoenix

Statement of Intent:

Using as much space as necessary below, provide a personal statement regarding your role and commitment to this application as it has been written.

My intent is to help my neighbors and friends establish a school to provide a high caliber education that prepares our children to enter high school and college ready to excel and obtain their highest dreams.

*The information and resume provided will be subject to verification by the board.

Mack Lin Stoddard

1894 North Blue Peak Drive
Pine Canyon, Utah 84074
Home: 435-843-5194

EDUCATION

- 1980** High School Diploma JJ Pearce High School Richardson, Texas
- 1988** Bachelor of Arts Brigham Young University Provo, Utah
International Relations/Russian
- 1995** Master of Business Administration University of Phoenix

EXPERIENCE

2005-present **Veterans Service Representative** **Department of Veterans**
Affairs

Salt Lake City, Utah

Duties: Function as (1) a counselor or advocate for VA claimants providing information about a broad range of benefits and assisting with applications for VA benefits and services, (2) a legal technician gathering requisite evidence from medical, military, community and other sources to support benefit determinations, (3) a decision maker weighing the evidence and applying the controlling laws and regulations.

1994-2005 **Sales Representative, team leader** **Delta Airlines**
Salt Lake City, Utah

This taught me how to find applicable rules and regulations and produce quick, accurate service to customers.

4/1992-12/1992 **Vice President Far Eastern Development** **SovCap, Inc.**
Nakhodka, Russia

Duties: Act as liaison between the American Partners and their Russian counterparts. Find, survey, obtain and prepare site for free-trade zone. Establish contracts with local construction and engineering firms to provide services for both our company and clients at the site. Provide for translation of all documentation into both Russian and English and verify accuracy of translations. Assure all work to be done at site is to International standards. Find and qualify Russian, Korean and other businesses to participate the free-trade zone. Help match qualified Russian businesses with partners/investors in the US. Host visiting US Government and business delegations visiting Russian Far East.

Accomplishments: Obtained legal rights to land with existing rail spur and port access for the largest (by area) free trade zone in the world. Completed four phase survey and feasibility study for trade zone site to meet American standards and comply with Russian law. Contracted with Russian / English joint venture firm to provide engineering services and manage local construction crews in accordance with both Russian law and International treaties. Set up translation services with Moscow State University professor overseeing project. Hosted visit from US agencies to establish authorization for insuring US investors in this project. I accomplished these tasks two years ahead of the most conservative estimates and more than \$100,000 under budget.

4/1987-4/1990

Attaché to the US Embassy in Moscow, Russia

Pacific Architects and Engineers

Arlington, Virginia

Duties: Assist CG Administrative Officer in areas of procurement, property, housing, motor pool, visitor support and shipping and customs. Assist the Admin Officer on all VIP visits to the Embassy. Coordinate, schedule and track incoming and outgoing shipments and handle customs issues. Maintain visa lists in compliance with Soviet limitations. Assist embassy staff with all travel both personal and official. Perform courier service at the airport. Arrange delivery of basic materials and set up official embassy functions.

Section 10

Articles of Incorporation



EXCELSIOR
ACADEMY

ENGAGE › ENCOURAGE › EXCEL

Non-Profit Corporation Articles

ARTICLES OF INCORPORATION OF Excelsior Academy

We, the undersigned natural persons all being of the age of eighteen years or more, acting as incorporators under the Utah Revised Nonprofit Corporation Act, adopt the following Articles of Incorporation for such Corporation:

Article I Name

The name of the corporation is Excelsior Academy

Article II Purpose

Excelsior Academy is a charter school for grades K-8. The Academy will provide students with a **classical foundation of knowledge**, working at individual levels with the option to **accelerate advancement**, while **instilling a love of learning**.

To engage in any and all other lawful purposes, activities and pursuits, which are substantially similar to the foregoing and which are or may hereafter be authorized by Section 501(c)(3) of the Internal Revenue Code and are consistent with those powers described in the Utah Nonprofit Corporation and Cooperation Association Act, as amended and supplemented.

Article III Name and Address of Registered Agent

The address of the corporation's initial registered office shall be:

460 S 100 W
Tooele, UT 84074

The corporation's initial registered agent at such address shall be:

Ann Gubler

I hereby acknowledge and accept appointment as corporation registered agent:

Ann Gubler

Signature

Article IV Names and Addresses of Incorporators

The name(s) and address(es) of the incorporators are:

Incorporator #1
Ann Gubler
460 S 100 W
Tooele, UT 84074
Ann Gubler
Signature

In Witness Whereof I / We have executed these Articles of Incorporation on 30 8, 2007 and say:

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

**Article V
Members**

The nonprofit corporation will not have voting members

**Article VI
Shares**

The nonprofit corporation will not issue shares evidencing membership or interests in water or other property rights.

**Article VII
Directors/Trustees**

The name(s), address(es) and signature(s) of the director(s)/trustee(s) are:

Director #1
Ruth Dunn
818 Clifford Drive
Tooele, UT 84074
Ruth Dunn
Signature

Director #2
Heather Lynne McClatchey
755 E 890 N
Tooele, UT 84074
Heather Lynne McClatchey
Signature

Director #3
Heidi McCabe

1751 Anson Dr.
Tooele, UT 84074
Heidi McCabe
Signature

Article VIII

The period of duration of this corporation is Perpetual

Article IX

Principal Place of Business

The street address of the principal place of the business is:

460 S 100 W
Tooele, UT, 84074

State of Utah
Department of Commerce
Division of Corporations & Commercial Code
This certifies that this registration has been filed and
approved on 30, August 2007 in the office of the Division
and hereby issues this Certification thereof.

KATHY BERG
Division Director

Under GRAMA {63-2-201}, all registration information maintained by the Division is classified as public record. For confidentiality purposes, the business entity physical address may be provided rather than the residential or private address of any individual affiliated with the entity.

Minutes

Excelsior Academy Board Meeting
The Oaks Club House
January 30, 2008
7:00 pm

Present: Mack Stoddard, Ann Gubler, Sarah Natividad, Priscilla Wayman, Jennifer Haerle, Chantel Lloyd, Deann Hamilton, Heather McClatchey, Heidi McCabe, Anna Lurtcher, Shelly Taylor, Dori Woodbury, Terry Hancock

Welcome: Ann Gubler

1. Excelsior passed phase 1 of the charter process. We were 1 of the 10 that have moved on to the next step.
2. Mack Stoddard nominated Brenda Spearman to fill a seat on the Board of Trustees, 2nd by Deann Hamilton. All voted yes.
3. Heidi McCabe nominated Ruth Dunn to be the Acting PTO President, Sarah Natividad 2nd. All voted yes.
4. Articles of Incorporation presented, Mack Stoddard motioned to accept the Articles as they are, Anna Lurtcher 2nd. All voted to accept the Articles.

Motion to adjourn: 7:41 pm

Next meeting February 27, 2008 8:30 pm the Oaks ClubHouse.

Section 11

Comprehensive Program of Instruction

Curricular Emphasis	Page 72
Effectiveness Goals	Page 92
Lesson Plans/ Master Course List	Page 95
Program Instruction	Page 139
Calendar and Master Schedule	Page 142
Special Education	Page 146



**EXCELSIOR
ACADEMY**

ENGAGE › ENCOURAGE › EXCEL

Curricular Emphasis

Vision of Excelsior Academy

Excelsior will present a ***broad, classical education*** by basing its teachings around the Core Knowledge Sequence aligned with the Utah State Core and meets or exceeds all of the standards put forth by the Utah State Office of Education. In each grade students will be exposed to a broad range of historical, scientific, and cultural topics that will build on one another to prepare them for educational success. The scope of knowledge comprises what a culturally literate individual should know at each grade level. The Math curriculum will be based on time-tested and results-oriented mathematical curriculums. Saxon Math will be the primary math, with other curriculums, such as Singapore Math, used where a student needs extra practice or a different approach with a concept. The same model will be used for Language Arts. Open Court and Spaulding will be the primary Language Arts program, supplemented as needed.

In order to assist students with individual learning abilities, ***at their level***, teachers will have access to supplementary curriculums in Math, Language Arts/Reading, intervening with tutors in a tiered plan to prevent students from falling behind. Teachers will be able to develop a familiarity with a broad range of different curriculums and will have the resources to aid a struggling student or challenge a gifted one. Excelsior will use Teacher Aides and Parent Tutors extensively in giving each child individual and focused attention to aid them in filling in gaps in their knowledge. In addition, each grade level will schedule its Math, Language Arts and Reading to be taught at the same time. This will enable students to skip up or down to a different grade level in these subjects if their abilities warrant it. This will also give the three grade level teachers the option to specialize in Basic, Standard, or Advanced learning for each subject. The students may have the option to divide into each classroom for these topics based on their ability. This will be assisted by evaluating each child for correct grade placement and moving a child up or down in individual areas. Each student will be under ongoing evaluation to adjust their learning environment as needed.

Excelsior's goal of developing a ***life-long love of learning*** will be implemented through Directed Learning 'Club Time'. 'Club Time' will take place the last hour of each full school day. Each teacher will take a topic (mostly academic), and head up a quarter-long club. The teachers will have freedom to choose subjects about which they are excited and in which their students express an interest. Although the clubs will be mandatory, the students will be able to choose which club to attend. They will get to delve into topics to which they've been introduced and about which they want to learn more. This will spark their interest in learning for the sake of

the knowledge and not just the grade. Students who choose can also challenge themselves by going to clubs with older students on more difficult topics.

Philosophy – Core Beliefs

- A ***broad, solid foundation of classical knowledge*** will prepare a student for learning and enable them to develop character qualities that will assist them in their life as an adult.
- A student that has gaps in their education, or struggles with certain areas of understanding, has a difficult time progressing in the acquisition of knowledge. If these areas are addressed, through *individual or small group instruction*, as they arise, each student will be able to progress with a strong foundation of knowledge on which to build. Gifted, talented and accelerated children need opportunities for challenge and advancement to ward off complacency or a dislike of education caused by boredom or needless repetition.
- Students should love learning for its own sake, not just for an external reward. A *life long habit of acquiring knowledge* can be fostered as a youth by giving students opportunities to explore areas of interest in depth, and by having adults' model continual learning and excitement in their own lives and through classroom instruction. Many careers, hobbies, pastimes and passions are developed this way.

Philosophy – Approach

- A comprehensive core curriculum following Utah State Standard that covers what a 'culturally literate' American ought to know should be introduced to students so they are familiar with a broad, classical understanding of the world.
- Students should feel they are an important part of their education. They should be able to help customize some of their learning through opportunities to advance in areas in where they feel gifted and by getting help to strengthen areas which they feel are weak facilitated by the Tutor Intervention Program.
- A students' love of learning should be nurtured by giving them opportunities to delve deeper into topics to which they have been introduced; not just for a *grade* but for the enjoyment of understanding. And each student will have modeled to them by the teacher how to learn information outside of a traditional 'text book' lesson through Directed Learning 'Club Time'.

Method of Instruction

Excelsior understands that each student is an individual and therefore has individual learning styles. In order to provide an excellent education for each

student, and to fulfill our mission of helping children *learn at their level*, Excelsior incorporates different elements of instruction, including visual, auditory, and hands-on learning, particularly in the tiered Tutor Intervention Program where supplemental materials will be aimed at different learning styles than the core curriculum used in the main classroom. Since teachers have a large influence on a student's learning Excelsior places on-going training and continuing education as a high priority for its teachers.

- **Differentiated/Direct Instruction** – Differentiated Instruction is a teaching theory based on the premise that instructional approaches should vary and be adapted in relation to individual and diverse students in classrooms. Differentiated instruction offers multiple options for internalization, adjusts teaching methods for different learning styles, and is a blend of whole class, group and individual instruction. Differentiated Instruction utilizes Direct Instruction, which is a concise method of teaching that emphasizes well-developed and carefully planned lessons. It is based on the theory that clear instruction, eliminating misinterpretations, can greatly improve and accelerate learning.
- **Sequenced Learning** – We learn by building on what we already know. Students at Excelsior are offered a coherent sequence of specific knowledge that builds year by year. With a sequenced, comprehensive core curriculum, students will not have gaps or needless repetitions in the subject matter they are being taught. All teachers will be familiar with what has been taught previous to their grade and what will be covered in later grades, thus eliminating wasted classroom time.
- **Spiral Learning** – In subjects that require some mastery to move on to the next level (i.e. grammar and math), a repetitive method where students will daily touch briefly on previously introduced information gives them needed practice with the concept in order to master and use it consistently.
- **Student Portfolios** – Portfolios will be used as a tool for learning and assessment. Students will compile selected works in an individual portfolio.

Special Emphasis

- **Learning at Their Level** – Each student is an individual and has his/her own pace for learning. Each grade level will consist of three classrooms and three teachers. Teachers for each grade level will have the option to designate each classroom as Basic, Standard or Advanced, and the students can attend the class that best suits their learning abilities for Math and Language Arts/Reading. The Teachers may also structure their individual classrooms to house a leveled learning environment. Through ongoing assessments, the students can move up or down in the appropriate leveled learning group according to their needs.

- **Tutor Intervention Program (TIP)** – The Tutor Intervention Program is designed to detect and aid students before they fall behind in Math and Language Arts/Reading. Each classroom will have a teacher and an aide(s)/Parent Tutor volunteer(s) during Math and Language Arts/Reading instruction time. If a student struggles with a concept or is consistently scoring low on tests in a certain area, that student will meet with an aide/Parent Tutor for individual/small group instruction aimed at reinforcing an idea or approaching it with a different teaching method that is more conducive to learning for that student. This would take place during the usual instruction time for the classroom and would cease as soon as the child understands the weak area and can continue with the regular class. If this happens frequently, the student can move down a level (either within his/her grade or to another grade for that subject). Likewise, if a student is having difficulty or boredom because they are too advanced or want to move more quickly, this program would also assist them in a similar manner. Excelsior Academy will implement a 4-tiered approach to Math and Language Arts/Reading.¹¹
- **Accelerated Learning** – Students that learn at a fast pace (even if it's only in one topic) are given the opportunity to accelerate their learning. Math and Language Arts/Reading will be taught at the same time in each classroom in grades One through Eight. If a student's test scores and teacher observations indicate an advanced capability in a subject, they have the option of attending a Math or Language Arts/Reading course that is above their current grade level. When a student in the upper grades has no further grade to attend, they could opt to use a self-guided curriculum overseen by an Aide/Parent Tutor.
- **Directed Learning 'Club Time'** – Students will be introduced to a broad range of topics through the comprehensive core curriculum and will be given an opportunity to learn more about subjects that interest them. This mandatory program will take place the last hour of each full school day. Teachers will select a topic aligned with the Utah state core and head up a quarter-long club. The teachers will have freedom to choose subjects, with the approval of the Director, that they are excited about and that their students express an interest in learning while fulfilling state requirements as stated in the Utah State Core of Education. Students will be able to select the clubs in which they would like to participate. This will demonstrate to the students that learning is not just about the grade or the test, but also about the enjoyment of understanding and having knowledge from which to pull in order to comprehend more of the world. With teachers choosing topics in which they are interested, and children attending clubs of their choice,

¹¹ Chart 11-1 Diamond Framework for Language Arts/Reading Intervention and Chart 11-2 Diamond Framework for Mathematics Intervention at the end of this section.

teachers will model enthusiasm for learning and children will have a willingness to learn.

Method of Assessment

Excelsior Academy will utilize five methods of assessment to track the effectiveness of teaching the Utah State Core Standards and to provide a positive learning environment for our students:

- **State Mandated Assessments**
 - Core CRT – Criterion-Referenced Tests will be implemented online according to State Standards.
 - DWA – Direct Writing Assessment.
 - ITBS – The Iowa Tests of Basic Skills will be implemented according to State Standards and will be included in Student Portfolios.
 - Any other State Mandated Assessments on an as needed basis such as UALPA (Utah Academic Language Proficiency Assessment) and UAA (Utah Alternative Assessment).
- **Traditional Grading**

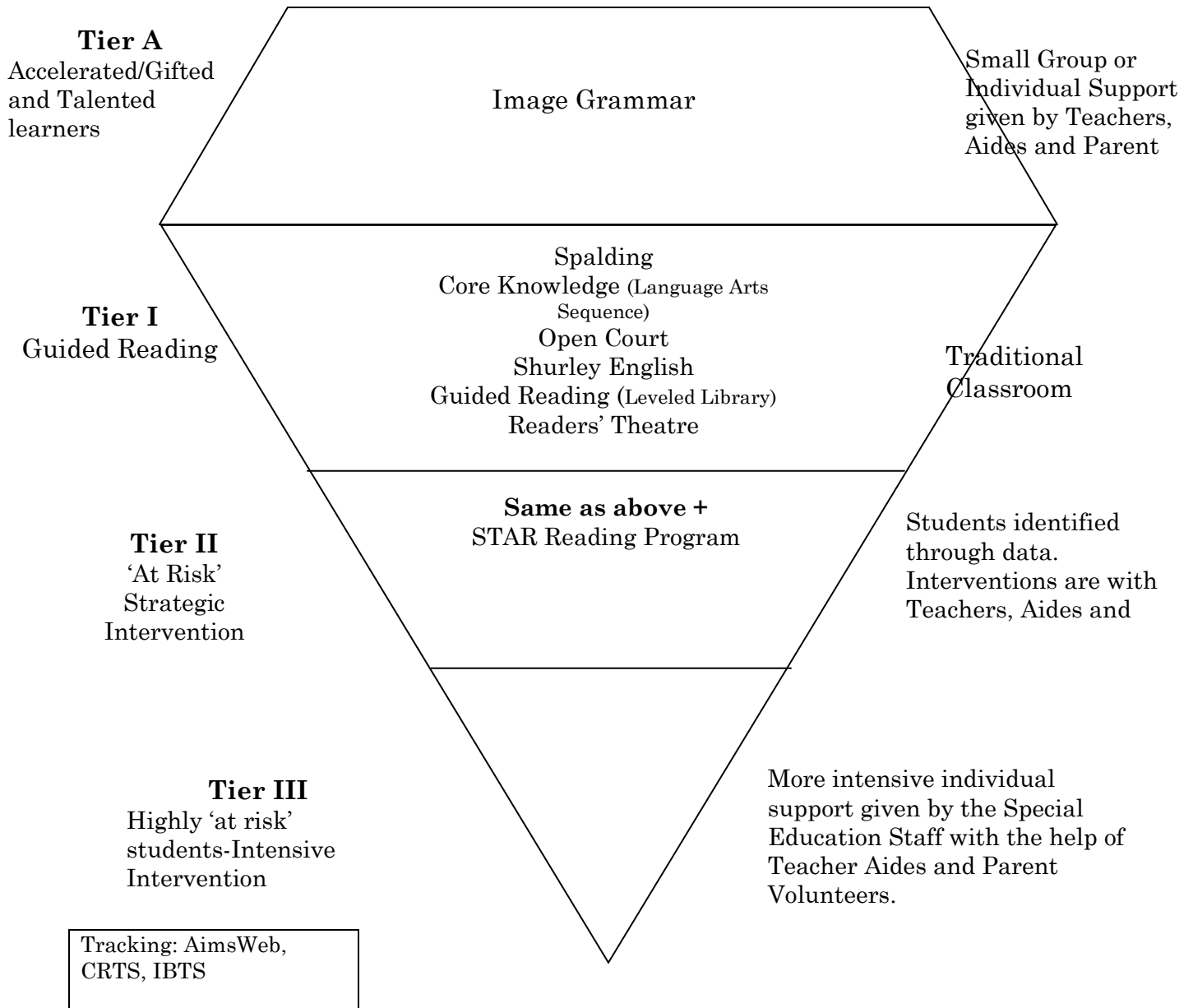
Students' scores will be kept up to date and accessible to parents, aids/tutors, students and the school Director(s).
- **Formative Assessments**
 - Outside testing services that monitor a student's progress and response to intervention, such as AIMSweb, which provides teachers, administrators and parents with continuing performance data as often as is necessary.
 - Student Portfolios will be used as a tool for learning, students will be able to showcase their work and reference previously covered materials. Parents will know what is being studied and observe how well their child understands the subjects.
- **Placement Tests for Math and Language Arts/Reading**

Curriculum specific placement tests will be used for initial placement and for adjusting students who feel that they are not at their level.
- **Student Led Conferences**

Students will present their Student Portfolios at regular 'Student-led' Parent/Teacher Conferences for parents to evaluate the student's performance, report on their progress, and follow up on personal goals. Teachers will use the Student Portfolios as a formative assessment throughout the year.

Chart 11-1

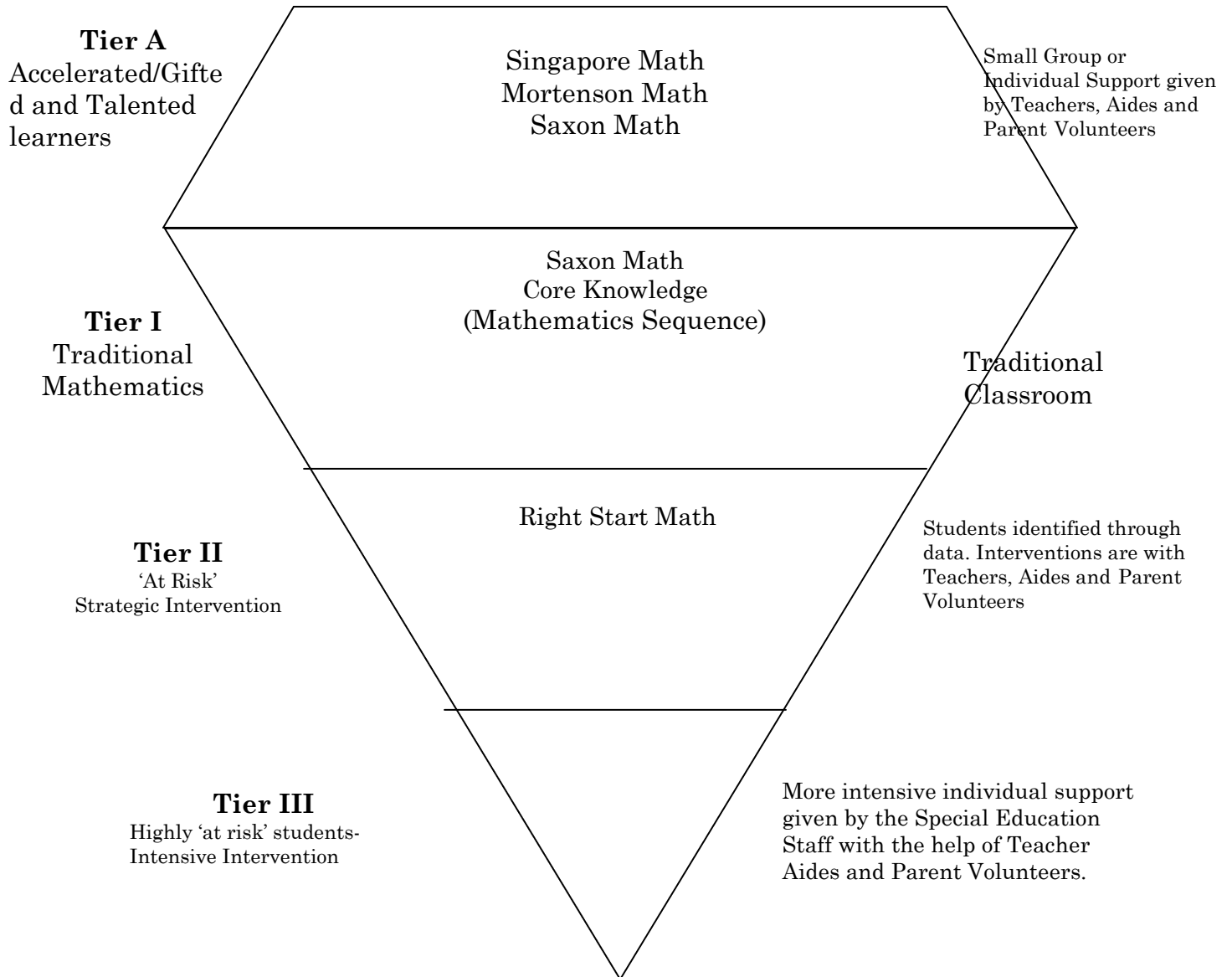
Diamond Framework for Language Arts/Reading Intervention



*These programs may be supplemented or adjusted according to the individual needs of the students and recommendations of Teachers and Specialists hired by Excelsior Academy.

Chart 11-2

Diamond Framework for Mathematics Intervention



Tracking: AimsWeb,
CRTS, IBTS

*These programs may be supplemented or adjusted according to the individual needs of the students and recommendations of Teachers and Specialists hired by Excelsior Academy.

Effectiveness Goals

At Excelsior Academy we understand that each student is an individual and has his/her own learning style and pace. Every objective Excelsior has created will provide a basis for each student to achieve success in their education.

The mission of Excelsior Academy is to provide students with a ***broad, classical foundation of knowledge***, and to help students acquire a ***life-long love of learning*** by giving them the opportunity to ***learn at their own level***. This mission is accomplished with smaller student/adult ratio's and holding the students accountable for their own progress by conducting "student led" parent-teacher conferences and maintaining their own portfolios.

By ongoing assessments teachers and parents can detect any problems the student may be having from the onset.

Goals	Specific Objective	Measurement Criteria
<p>1. Improve Student Learning</p>	<p>1a. Small Class Size: Excelsior will have small classes to accommodate lower student/adult ratios.</p> <p>1b. Low Student/Adult ratio: The school will employ a certified teacher and an aide.</p> <p>1c. High Math, Language Arts and Science CRT scores.</p> <p>1d. High Iowa Basic Skills Test scores.</p> <p>1e. Regular Assessments: Formative and summative assessments will be given to students on a regular basis.</p>	<p>1a. Class sizes will not exceed 24 students</p> <p>1b. Employ 1 aide per class for 4 hours per day. The school will have parent volunteers in the classroom.</p> <p>1c. Excelsior will establish a baseline by taking the school wide average of the CRT scores and the Iowa test scores earned in the first year of operation. Excelsior will increase school wide average Math, Language Arts and Science CRT scores by 3 percent each year until the school meets and maintains the goal of 90 percent.</p> <p>1d. Excelsior will increase school wide composite scores on the Iowa Basic Skills test by 2 percent each year until the school meets and maintains the goal of 75 percent.</p> <p>1e. Formative assessments will be given throughout the year with additional curriculum</p>

	<p>1f. Student Portfolios: Students will present their Student Portfolios at regular ‘Student-led’ Parent/Teacher Conference for parents to evaluate the student’s performance, report on their progress, and follow up on personal goals. Teachers will use the Student Portfolios as a formative assessment throughout the year.</p>	<p>specific placement tests on an as needed basis. Summative assessments will be given quarterly, at the beginning of the year (ITBS) and at year end (CRT). Student grades and progress tracking will be available with AIMSWeb and online grade posting. Results will be reported to parents and Director at mid-term and end of term.</p> <p>1f. Teachers will give students a grade based on a rubric created by each teacher. Excelsior’s goal is a school wide average of 85% the first year and 90% thereafter.</p>
<p>2. High Parent/Teacher Conferences Attendance</p>	<p>2a. Quarterly Parent/Teacher Conferences will be held with each student. Students will present portfolios, report on their progress and follow up on personal goals in “student led” Parent/Teacher Conferences.</p>	<p>2a. The goal is to have 90 percent participation in the parent/teacher conference. Excelsior Academy will establish a base line of attendance by averaging attendance at all parent teacher conferences in the first year. The school will increase attendance by 5 percent each year until the goal is met and maintained. The director will report parent teacher conference participation to the Board of Trustees.</p>
<p>3. Teacher Professional Development</p>	<p>3a. Teachers will achieve Level 2 status.</p> <p>3b. Teachers will receive professional development.</p>	<p>3a. Teachers will receive support and mentoring through the EYE Program. Teachers will also report the conferences, seminars and training classes they attend to the director.</p> <p>3b. Teachers will receive ongoing training through annual professional development training. Excelsior Academy’s attendance goal for professional development seminars</p>

	<p>3c. Teachers will receive continuing/higher education.</p>	<p>is 100%.</p> <p>3c. Teachers will be assisted through public grants/scholarships to continue their education. Teachers will be required to report college credits earned or audited to the director on an annual basis. Teachers will be compensated through a merit-based pay system.</p>
<p>4. Broad, Classical Foundation of Knowledge</p>	<p>4a. Teachers will follow the State Core Curriculum and the Core Knowledge Sequence to ensure students will be exposed to a broad range of topics that will build on one another to prepare them for educational success. Excelsior will utilize curriculum-specific testing and previous summative assessments to assess the student’s individual foundation of knowledge. Individual goals will be set with the student and reported to the parent at the parent teacher conference.</p>	<p>4a. Individual progress will be tracked with AIMSweb. Excelsior Academy’s goal is to have 80% of the student body on the “Director’s List” (a list of students with a B average or better using the traditional grading system). CRT scores will be used to measure a students knowledge (see 1c. above).</p>
<p>5. Leveled Learning</p>	<p>5a. Students will have the opportunity to learn at their level in Mathematics and Language Arts/Reading using a learning style that is conducive to their acquisition of knowledge. Teachers will have access to supplementary curriculums in Math and Language Arts/Reading. Excelsior will use Teacher Aides and Parent Tutors extensively in giving each child individual and focused attention to aid them in filling in gaps in their knowledge. Each grade level will schedule its Math, Language Arts/Reading to be taught at the same time, enabling students to attend a level outside their classroom.</p>	<p>5a. Excelsior Academy’s goal is to have 95% of the student body learning at or above their grade level. The school will establish a baseline of students on grade level after their first year of operation. Excelsior will increase the number of students on grade level by 3% each year until the goal is met and maintained. All students will take the core tests at their current grade level without regard to their Math or Language Arts/Reading placement level.</p>
<p>6. Develop a Lifelong Love of Learning</p>	<p>6a. Students will be given an opportunity to learn more about subjects that interest them through structured, mandatory attendance in Directed Learning/’Club Time’. Students will be given the opportunity to learn more about subjects that interest them through structured, mandatory attendance in Directed Learning/’Club Time’.</p>	<p>6a. Students will earn a participation grade from the supervising teacher. Excelsior Academy’s goal is to have 25% of the Directed Learning/’Club Time’ subjects requested by students in the 2nd year of operation, increasing by 25% each year to 75% by the third year of operation.</p>

Lesson Plans

Sample 1: First Grade Mathematics

Page 83

Students will learn about writing numbers, addition facts, shapes, counting by 10's, subtraction facts, counting money, volume measurement, ordinal position, counting by 2's, telling time, and even numbers.

Sample 2: Fifth Grade Social Studies Civil War Unit

Page 96

This is a Fifth Grade History and Geography Unit. This unit will explore several of the causes and events that led to the Civil War, the election of Abraham Lincoln, and two of the first battles of the war. This unit is designed to enable students to identify the geography, and its influence on the Northern and Southern states.

Sample 3: Seventh Grade Literature Edgar Allen Poe

Page 106

This unit will explore some of Edgar Allan Poe's most famous literary works. This unit is designed to enable students to appreciate the works of the father of the modern short story. Students will study the master at work in several literary genres: short story, characterization, and interpretation. Skills include appreciation of cultural differences, literary devices, and creating original stories.

Sample 4: Upper Elementary/Junior High Directed Learning 'Club Time'

Page 117

This Unit will inspire and encourage the love of learning through science. Introduce students to the scientific method, logical reasoning, and ethical decision making, by way of experiments, interesting historical stories, and debate.

Mathematics Unit

Saxon Lessons 41-49 and Assessment (Lesson 50)

Grade Level: 1st

Length of Unit: 10 Days

I. UNIT OVERVIEW

Students will learn about writing numbers, addition facts, shapes, counting by 10's, subtraction facts, counting money, volume measurement, ordinal position, counting by 2's, telling time, and even numbers.

II. OBJECTIVES

A. Concept Objectives:

1. Writing numbers 37 through 45.
2. Addition Facts – adding 0.
3. Covering a design with different shapes.
4. Counting by 10's to 100.
5. Subtraction facts – subtracting 1.
6. Counting dimes.
7. Ordering containers by volume.
8. Identifying one-cup liquid measure.
9. Counting by 2's.
10. Telling time to the hour.
11. Identifying even numbers to 20.

B. Core Knowledge Content

1. Patterns and Classification – Grade 1, Mathematics
2. Numbers and Number Sense – Grade 1, Mathematics
3. Money – Grade 1, Mathematics
4. Computation (Addition, Subtraction, Solving Problems and Equations) – Grade 1, Mathematics
5. Measurement – Grade 1, Mathematics
6. Geometry – Grade 1, Mathematics

C. State Standards:

1. Standard 1, Objective 1a. Count, read, and write whole numbers.*
2. Standard 1, Objective 1b. Represent whole numbers using the number line, models, and number sentences.*
3. Standard 1, Objective 1c. Represent whole numbers greater than 10 in groups of tens and ones using objects, pictures, and expanded notation.
4. Standard 1, Objective 2c. Identify one more, one less, 10 more, and 10 less than a given number.
5. Standard 1, Objective 2d. Identify numbers missing from a counting sequence.*

6. Standard 1, Objective 3a. Use a variety of models, including objects, length-based models, the number line and the ten frame to describe problem types.
7. Standard 1, Objective 3b. Use the properties of addition and the mathematical relationship between addition and subtraction to solve problems.
8. Standard 1, Objective 3c. Compute basic addition facts and the related subtraction facts using strategies.
9. Standard 2, Objective 1a. Identify, create, and label repeating patterns using objects, pictures, and symbolic notation.*
10. Standard 2, Objective 1d. Use patterns to establish skip counting by twos, fives, and tens.
11. Standard 2, Objective 2a. Recognize that “=” indicates that the two sides of an equation are expressions of the same number.

*Because of the ‘spiral’ nature of Saxon, these four concepts are reinforced daily and are therefore not listed under each lesson.

III. RESOURCES

A. Standar Curriculums:

Larson, Nancy. Math 1 An Incremental Development. Norman, Oklahoma: Saxon Publishers, Inc, 1994.

Hirsch, Jr. E.D. What Your 1st Grader Needs to Know. New York: Dell Publishing, 1993.

B. Supplemental Curriculums:

Cotter, Joan A. RightStart Mathematics. Linton, North Dakota: Activities for Learning, 2000.

Cotter, Joan A. Math Card Games. Linton, North Dakota: Activities for Learning, 2000.

IV. PRE-ASSESSMENT

- A. The last unit’s test results should be reviewed to asses if any students are missing concepts or are not being challenged and need the Tutor Intervention Program (TIP).
- B. Note: This is a Standard lesson. Students designated as Advanced in Mathematics have been previously placed in their appropriate levels (Math 2, Math 3,...) based on their initial or on-going assessments. The students designated as Basic will be receiving small group or one-on-one instruction through TIP. In an extreme case, a Basic student may attend a lower grade’s Standard class.

V. LESSONS

Lesson One (Day 1): Saxon Lesson 41

- A. Daily Objectives:
 1. Lesson Content:

- a. Writing the number 37.
 - b. Addition facts – adding zero.
 - 2. Concept Objective:
 - a. Students will write the number 37.
 - b. Students will learn how to add zero.
 - 3. State Standards (1st Grade – Mathematics):
 - a. Standard 1, Objective 3a. Use a variety of models, including objects, length-based models, the number line and the ten frame to describe problem types.
 - b. Standard 1, Objective 3b. Use the properties of addition and the mathematical relationship between addition and subtraction to solve problems.
 - c. Standard 1, Objective 3c. Compute basic addition facts and the related subtraction facts using strategies.
 - d. Standard 2, Objective 2a. Recognize that “=” indicates that the two sides of an equation are expressions of the same number.
- B. Materials:
- 1. Pennies
 - 2. Fact Cards – Adding Zero
 - 3. 3x5 cards
 - 4. Fact Sheet AA 3.0
 - 5. Worksheets 41A/B
- C. Key Vocabulary:
- 1. ‘Some, some more’
- D. Procedures:
- 1. Follow Saxon Meeting Time Schedule for:
 - a. Calendar
 - b. Weather Graph
 - c. Counting
 - d. Number Pattern
 - e. Clock
 - f. Coins
 - g. Right/Left
 - 2. Introduce today’s concepts as presented in Saxon Lesson 41:
 - a. Writing the Number 37.
 - b. Addition Facts – Adding Zero.
 - 3. Class Practice:
 - a. Fact Sheet AA 3.0.
 - 4. Written Practice:
 - a. Worksheet 41 A
 - b. Worksheet 41 B (homework)
- E. Assessment:
- 1. Fact Sheet AA 3.0
 - 2. Worksheet 41 A/B

Lesson Two: (Day 2): Saxon Lesson 42

A. Daily Objectives:

- 1. Lesson Content:
 - a. Writing the number 38.

- b. Designs and shapes.
 - 2. Concept Objective:
 - a. Students will write the number 38.
 - b. Students will cover a design in different ways, with different shapes.
 - 3. State Standards (1st Grade – Mathematics):
 - a. Standard 1, Objective 3a. Use a variety of models, including objects, length-based models, the number line and the ten frame to describe problem types.
- B. Materials:
 - 1. Pattern blocks
 - 2. Saxon Master 1-42
 - 3. Crayons
 - 4. Fact Cards – Adding one
 - 5. Fact Sheet AA 2.0
 - 6. Worksheet 42 A/B
- C. Key Vocabulary:
 - 1. Design
 - 2. ‘Pattern blocks’
- D. Procedures:
 - 1. Follow Saxon Meeting Time Schedule for:
 - a. Calendar
 - b. Weather Graph
 - c. Counting
 - d. Number Pattern
 - e. Clock
 - f. Coins
 - g. Right/Left
 - 2. Introduce today’s concepts as presented in Saxon Lesson 42:
 - a. Writing the Number 38.
 - b. Covering Designs in Different Ways with Different Shapes.
 - 3. Class Practice:
 - a. Use fact cards to review adding one.
 - b. Fact Sheet AA 2.0.
 - 4. Written Practice:
 - a. Worksheet 42 A
 - b. Worksheet 42 B (homework)
- E. Assessment:
 - 1. Fact Sheet AA 2.0
 - 2. Worksheet 42 A/B

Lesson Three: (Day 3): Saxon Lesson 43

- A. Daily Objectives:
 - 1. Lesson Content:
 - a. Writing the number 39.
 - b. Counting by 10’s to 100.
 - 2. Concept Objective:
 - a. Students will write the number 39.
 - b. Students will practice counting by 10’s to 100.

3. State Standards (1st Grade – Mathematics):
 - a. Standard 1, Objective 1c. Represent whole numbers greater than 10 in groups of tens and ones using objects, pictures, and expanded notation.
 - b. Standard 1, Objective 2c. Identify one more, one less, 10 more, and 10 less than a given number.
 - c. Standard 1, Objective 3b. Use the properties of addition and the mathematical relationship between addition and subtraction to solve problems.
 - d. Standard 1, Objective 3c. Compute basic addition facts and the related subtraction facts using strategies.
 - e. Standard 2, Objective 1d. Use patterns to establish skip counting by twos, fives, and tens.

B. Materials:

1. Hundred Number Chart
2. Linking Cubes
3. 100 Cubes (50 in one color, 50 in another color)
4. 10 Clear Plastic Bags
5. Abacus
6. Place Value Cards
7. Fact Sheet A 3.0
8. Worksheet 43 A/B

C. Key Vocabulary:

1. 'Skip Counting'

D. Procedures:

1. Follow Saxon Meeting Time Schedule for:
 - a. Calendar
 - b. Weather Graph
 - c. Counting
 - d. Number Pattern
 - e. Clock
 - f. Coins
 - g. Right/Left
2. Introduce today's concepts as presented in Saxon Lesson 43:
 - a. Writing the Number 39.
 - b. Counting by 10's to 100.
3. Use the blocks, bags, and abacus to follow the activities listed in Lesson 23, page 46, of RightStart Mathematics, which reinforce counting by tens, counting by ones, and place-value.*
4. Class Practice:
 - a. Fact Sheet A 3.0.
5. Written Practice:
 - a. Worksheet 43 A
 - b. Worksheet 43 B (homework)

* If time is limited, the procedures with an asterisk may be substituted in place of worksheet 43 A for students who don't feel confident that they understand the concept

E. Assessment:

1. Fact Sheet A 3.0

2. Worksheet 43 A/B

Lesson Four (Day 4): Saxon Lesson 44

A. Daily Objectives:

1. Lesson Content:
 - a. Writing the number 40.
 - b. Subtraction Facts – Subtracting One.
2. Concept Objective:
 - a. Students will write the number 40.
 - b. Students will learn how to subtract one.
3. State Standards (1st Grade – Mathematics):
 - a. Standard 1, Objective 2c. Identify one more, one less, 10 more, and 10 less than a given number.
 - b. Standard 1, Objective 3a. Use a variety of models, including objects, length-based models, the number line and the ten frame to describe problem types.
 - c. Standard 1, Objective 3b. Use the properties of addition and the mathematical relationship between addition and subtraction to solve problems.
 - d. Standard 1, Objective 3c. Compute basic addition facts and the related subtraction facts using strategies.
 - e. Standard 2, Objective 2a. Recognize that “=” indicates that the two sides of an equation are expressions of the same number.

B. Materials:

1. Linking Cubes
2. 0-20 Number Cards (from Master 1-32)
3. Fact Cards – Subtracting One
4. 3x5 cards
5. Fact Sheet S 2.0
6. Worksheets 44 A/B

C. Key Vocabulary:

1. Subtract

D. Procedures:

1. Follow Saxon Meeting Time Schedule for:
 - a. Calendar
 - b. Weather Graph
 - c. Counting
 - d. Number Pattern
 - e. Clock
 - f. Coins
 - g. Right/Left
2. Introduce today’s concepts as presented in Saxon Lesson 44:
 - a. Writing the Number 40.
 - b. Subtraction Facts – subtracting one.
- 3.
4. Class Practice:
 - a. Fact Sheet S 2.0.
5. Written Practice:
 - a. Worksheet 44 A

- b. Worksheet 44 B (homework)
- E. Assessment:
 - 1. Fact Sheet S 2.0
 - 2. Worksheet 44 A/B

Lesson Five (Day 5): Saxon Lesson 45

- A. Daily Objectives:
 - 4. Lesson Content:
 - a. Writing the number 41.
 - b. Counting Dimes.
 - 5. Concept Objective:
 - a. Students will write the number 40.
 - b. Students will learn to count dimes.
 - 6. State Standards (1st Grade – Mathematics):
 - a. Standard 1, Objective 1a. Count, read, and write whole numbers.
 - b. Standard 1, Objective 1b. Represent whole numbers using the
 - c. Standard 1, Objective 1c. Represent whole numbers greater than 10 in groups of tens and ones using objects, pictures, and expanded notation.
 - d. Standard 1, Objective 2c. Identify one more, one less, 10 more, and 10 less than a given number.
 - e. Standard 1, Objective 3a. Use a variety of models, including objects, length-based models, the number line and the ten frame to describe problem types.
 - f. Standard 1, Objective 3c. Compute basic addition facts and the related subtraction facts using strategies.
 - g. Standard 2, Objective 1d. Use patterns to establish skip counting by twos, fives, and tens.
- B. Materials:
 - 1. Dimes
 - 2. Pennies
 - 3. Abacus
 - 4. Fact Cards – Adding One
 - 5. Fact Sheet AA 2.0
 - 6. Worksheets 45 A/B
- C. Procedures:
 - 1. Follow Saxon Meeting Time Schedule for:
 - a. Calendar
 - b. Weather Graph
 - c. Counting
 - d. Number Pattern
 - e. Clock
 - f. Coins
 - g. Right/Left
 - 2. Introduce today’s concepts as presented in Saxon Lesson 45:
 - a. Writing the Number 41.
 - b. Counting Dimes Activity.

3. Follow the dime activity from Lesson 37, page 74, in RightStart Mathematics, using the abacus and the coin problems.*
4. More practice with 10's is available in Lesson 42, page 84, in RightStart Mathematics, which introduces the tens column on side two of the abacus.*
5. Introduce adding 10's to numbers with the abacus using the activities in Lesson 51, page 102, of RightStart Mathematics.*
6. Class Practice:
 - a. Fact Sheet AA 2.0.
7. Written Practice:
 - a. Worksheet 45 A
 - b. Worksheet 45 B (homework)

* If time is limited, the procedures with an asterisk may be substituted in place of worksheet 45 A for students who don't feel confident that they understand the concept

D. Assessment:

1. Fact Sheet AA 2.0
2. Worksheet 45 A/B

Lesson Six (Day 6): Saxon Lesson 46

A. Daily Objectives:

1. Lesson Content:
 - a. Writing the number 42.
 - b. Ordering Containers by Volume.
 - c. One-cup Measure
2. Concept Objective:
 - a. Students will write the number 42.
 - b. Students will order containers by volume.
 - c. Students will identify a one-cup liquid measurement.
3. State Standards (1st Grade – Mathematics):
 - a. Standard 1, Objective 3a. Use a variety of models, including objects, length-based models, the number line and the ten frame to describe problem types.
 - b. Standard 1, Objective 3b. Use the properties of addition and the mathematical relationship between addition and subtraction to solve problems.
 - c. Standard 1, Objective 3c. Compute basic addition facts and the related subtraction facts using strategies.

B. Materials:

1. 1-cup Liquid Measuring Cup
2. Five Empty Containers
3. Basin, Funnel, and Newspaper
4. Masking Tape
5. Marker
6. Linking Cubes (10 each of red, green, blue, yellow, and black)
7. Fact Cards – Subtracting One
8. Fact Sheet S 2.0
9. Worksheets 46 A/B

C. Key Vocabulary:

1. One-cup
- D. Procedures:
1. Follow Saxon Meeting Time Schedule for:
 - a. Calendar
 - b. Weather Graph
 - c. Counting
 - d. Number Pattern
 - e. Clock
 - f. Coins
 - g. Right/Left
 2. Introduce today's concepts as presented in Saxon Lesson 46:
 - a. Writing the Number 42.
 - b. Ordering Containers by Volume and Identifying One-Cup Liquid Measure.
 3. Class Practice:
 - a. Use fact cards to review subtracting one.
 - b. Fact Sheet S 2.0.
 4. Written Practice:
 - a. Worksheet 46 A
 - b. Worksheet 46 B (homework)
- E. Assessment:
1. Fact Sheet S 2.0
 2. Worksheet 46 A/B

Lesson Seven (Day 7): Saxon Lesson 47

- A. Daily Objectives:
1. Lesson Content:
 - a. Writing the number 43.
 - b. Counting by 2's.
 2. Concept Objective:
 - a. Students will write the number 43.
 - b. Students will practice counting by 2's.
 3. State Standards (1st Grade – Mathematics):
 - a. Standard 1, Objective 2c. Identify one more, one less, 10 more, and 10 less than a given number.
 - b. Standard 1, Objective 3b. Use the properties of addition and the mathematical relationship between addition and subtraction to solve problems.
 - c. Standard 1, Objective 3c. Compute basic addition facts and the related subtraction facts using strategies.
 - d. Standard 2, Objective 1d. Use patterns to establish skip counting by twos, fives, and tens.
- B. Materials:
1. Five Dolls, Stuffed Animals, or Action Figures
 2. Fact Cards – Adding Zero, Adding One, Subtracting One
 3. Fact Sheet A 1.2
 4. Games: Pattern Memory, Even-Odd Memory, Dot Memory (RightStart)
 5. Worksheets 47 A/B

C. Procedures:

1. Follow Saxon Meeting Time Schedule for:
 - a. Calendar
 - b. Weather Graph
 - c. Counting
 - d. Number Pattern
 - e. Clock
 - f. Coins
 - g. Right/Left
2. Introduce today's concepts as presented in Saxon Lesson 47:
 - a. Writing the Number 43.
 - b. Counting by 2's.
3. Using the abacus and the activity in Rightstart Mathematics, Lesson 17, page 35, to reinforce counting by 2's.*
4. Class Practice:
 - a. Use fact cards to review adding zero, adding one, and subtracting one
 - b. Fact Sheet A 1.2.
 - c. Centers: Pattern Memory game (RightStart), Even-Odd Memory (RightStart), Dot Memory (RightStart), and the fact cards for adding zero, adding one, and subtracting one (Saxon).*
5. Written Practice:
 - a. Worksheet 47 A
 - b. Worksheet 47 B (homework)

* If time is limited, the procedures with an asterisk may be substituted in place of worksheet 47 A for students who don't feel confident that they understand the concept.

D. Assessment:

1. Fact Sheet A 1.2
2. Worksheet 47 A/B

Lesson Eight (Day 8): Saxon Lesson 48

A. Daily Objectives:

1. Lesson Content:
 - a. Writing the number 44.
 - b. Telling time to the hour.
2. Concept Objective:
 - a. Students will write the number 44.
 - b. Students will practice counting by 10's to 100.
3. State Standards (1st Grade – Mathematics):
 - a. Standard 1, Objective 2c. Identify one more, one less, 10 more, and 10 less than a given number.
 - b. Standard 1, Objective 3a. Use a variety of models, including objects, length-based models, the number line and the ten frame to describe problem types.
 - c. Standard 1, Objective 3b. Use the properties of addition and the mathematical relationship between addition and subtraction to solve problems.

- d. Standard 1, Objective 3c. Compute basic addition facts and the related subtraction facts using strategies.
- B. Materials:
1. Demonstration Clock
 2. Individual Clocks
 3. Small Bell
 4. Fact Cards – Adding Zero, Adding One, Subtracting One
 5. Fact Sheet A 2.0
 6. Clock Pictures and Time Cards (RightStart)
 7. Worksheets 48 A/B
- C. Key Vocabulary:
1. Morning
 2. Afternoon
 3. Evening
- D. Procedures:
1. Follow Saxon Meeting Time Schedule for:
 - a. Calendar
 - b. Weather Graph
 - c. Counting
 - d. Number Pattern
 - e. Clock
 - f. Coins
 - g. Right/Left
 2. Introduce today’s concepts as presented in Saxon Lesson 48:
 - a. Writing the Number 44.
 - b. Telling Time to the Hour.
 3. Class Practice:
 - a. Use fact cards to review adding zero, adding one, and subtracting one.
 - b. Fact Sheet A 2.0.
 - c. Use the hour clock pictures and time cards for the activity in RightStart Mathematics, Lesson 54, page 108. (Can be done in small groups.)*
 - d. Play the O’clock Memory Game from Lesson 54, page 109, of RightStart Mathematics. (Can be done in small groups.)*
 4. Written Practice:
 - a. Worksheet 48 A
 - b. Worksheet 48 B (homework)

* If time is limited, the procedures with an asterisk may be substituted in place of worksheet 48 A for students who don’t feel confident that they understand the concept
- E. Assessment:
1. Fact Sheet A 2.0
 2. Worksheet 48 A/B

Lesson Nine (Day 9): Saxon Lesson 49

- A. Daily Objectives:
1. Lesson Content:
 - a. Writing the number 45.

- b. Identifying even numbers to 20.
 - 2. Concept Objective:
 - a. Students will write the number 45.
 - b. Students will identify even numbers to 20.
 - 3. State Standards (1st Grade – Mathematics):
 - a. Standard 1, Objective 1c. Represent whole numbers greater than 10 in groups of tens and ones using objects, pictures, and expanded notation.
 - b. Standard 1, Objective 2c. Identify one more, one less, 10 more, and 10 less than a given number.
 - c. Standard 2, Objective 1d. Use patterns to establish skip counting by twos, fives, and tens.
- B. Materials:
 - 1. Pennies
 - 2. Fact Cards – Adding Zero, Adding One
 - 3. Fact Sheet A 3.0
 - 4. Worksheets 49 A/B
- C. Key Vocabulary:
 - 1. Even
- D. Procedures:
 - 1. Follow Saxon Meeting Time Schedule for:
 - a. Calendar
 - b. Weather Graph
 - c. Counting
 - d. Number Pattern
 - e. Clock
 - f. Coins
 - g. Right/Left
 - 2. Introduce today’s concepts as presented in Saxon Lesson 49:
 - a. Writing the Number 45.
 - b. Identifying Even Numbers to 20.
 - 3. Use the abacus and the activity in Lesson 18, page 36, of RightStart Mathematics, to practice evens.*
 - 4. Use the Matching Cards and Slips activity in Lesson 18, page 37, of RightStart Mathematics to practice evens and odds. (Can be done in small groups.)*
 - 5. Class Practice:
 - a. Use fact cards to review adding zero, and adding one.
 - b. Fact Sheet A 3.0.
 - 6. Written Practice:
 - a. Worksheet 49 A
 - b. Worksheet 49 B (homework)

* If time is limited, the procedures with an asterisk may be substituted in place of worksheet 49 A for students who don’t feel confident that they understand the concept.
- E. Assessment:
 - 1. Fact Sheet A 3.0
 - 2. Worksheet 49 A/B

Lesson Ten (Day 10): ASSESSMENT (Saxon Lesson 50)

A. Daily Objectives:

1. Lesson Content:
 - a. Assessment for Lessons 41-49
2. Concept Objective:
 - a. Students demonstrate acquired knowledge in writing numbers, addition facts, shapes, counting by 10's, subtraction facts, counting money, volume measurement, ordinal position, counting by 2's, telling time, and even numbers.

B. Materials:

1. Assessment #9

C. Procedures:

1. Follow Saxon Meeting Time Schedule for:
 - a. Calendar
 - b. Weather Graph
 - c. Counting
 - d. Number Pattern
 - e. Clock
 - f. Coins
 - g. Right/Left
2. Give Students Assessment #9.

VI. HANDOUTS/WORKSHEETS

See Inserts A, B, C

VII. BIBLIOGRAPHY

Larson, Nancy. Math 1 An Incremental Development. Norman, Oklahoma: Saxon Publishers, Inc, 1994.

Hirsch, Jr. E.D. What Your 1st Grader Needs to Know. New York: Dell Publishing, 1993.

Cotter, Joan A. RightStart Mathematics. Linton, North Dakota: Activities for Learning, 2000.

Cotter, Joan A. Math Card Games. Linton, North Dakota: Activities for Learning, 2000.

Social Studies Lesson Unit Plan

The Civil War

Grade Level: 5th,

Length of Unit: 8-9 Days

I. UNIT OVERVIEW

This unit will explore several of the causes and events that led to the Civil War, the election of Abraham Lincoln, and two early battles of the war. This unit is also designed to enable students to identify the geography and its influence on the Northern and Southern states.

II. OBJECTIVES

A. Concept Objectives:

1. Students will be able to evaluate maps from 1800-1860 to describe the influence of geography on the Northern and Southern states.
 - a. way of life
 - b. slavery
 - c. agricultural and industry
2. Students will be able to identify four causes that led to the Civil War.
 - a. different ways of life in the North and South
 - b. paid labor in the North versus slave labor in the South
 - c. slavery
 - d. states rights
3. Students will be able to describe the events that led to the outbreak of the American Civil War.
4. Students will be able to examine the events and impact of two early battles of the Civil War.
 - a. Attack on Fort Sumter
 - b. First Battle of Bull Run (Battle of Manassas)

B. Core Knowledge Content:

1. "The Civil War: Causes, Conflicts, Consequences" - Grade 5, Social Studies
2. "US Geography" - Grade 5, Social Studies

C. State Standards:

1. 5th grade – Social Studies:
 - a. Standard 10, Objective 2a. Compare geography of the northern and southern states and its influence on agriculture and industry.
 - b. Standard 10, Objective 2b. Examine maps of the United States from 1800 to 1860.
 - c. Standard 10, Objective 2c. Identify the Northern and Southern States in the Civil War.
 - d. Standard 6, Objective 2a. Examine reasons for the Civil War.

III. BACKGROUND KNOWLEDGE

- D. See Baltimore Curriculum Project (BCP) - 5th Grade, Geography Lessons 14 -16 and History Lessons 24-28.

IV. RESOURCES

Freedman, Russell. Lincoln: A Photobiography. New York: Clarion, 1987.

Hakim, Joy. A History of US: War, Terrible War. New York: Oxford University Press, 1994.

Hirsch, E. D., ed. What Your 5th Grader Needs to Know. New York: Doubleday, 1993.

Stampp, Kenneth M. The Causes of The Civil War. Englewood Cliffs: Prentice Hall, 1974.

V. PRE-ASSESSMENT

- E. Students will write a State of the Union Address as if they are Lincoln, answering the question: Would you engage in a war with the South? Support your answer.

VI. EXTENSION

- F. The students who complete each daily task early will be encouraged to study the Lincoln/Douglas debates. They will put together a news broadcast as if there had been television during the Presidential election campaign. They will write a script for Election Day acting as if they are broadcasting the results of the election, showing how each state voted. They will also discuss, while they are “waiting” for the results to come in, the main issues of the election and where Lincoln and Douglas stood on those issues. They will have the option to film it, which we will watch at the end of the unit, or perform it for the class.

VII. LESSONS

Lesson 14 (Day 1): “Regions of the USA”

G. Daily Objectives:

1. Lesson Content:
 - a. Concept of regions.
 - b. Define “region,” “North,” and “South”.
2. Concept Objective:
 - a. Examine different ways of defining a region using special purpose maps of the USA.
3. State Standards (5th Grade – Social Studies):
 - a. Standard 10, Objective 2a. Compare geography of the northern and southern states and its influence on agriculture and industry.
 - b. Standard 10, Objective 2b. Examine maps of the United States from 1800 to 1860.

H. Materials:

1. Classroom-size map of the world
2. Classroom-size map of the USA

3. Worksheet (Insert A)
 4. Maps (BCP Geography Lesson 14)
 5. Sentence strip containing the following definition: *Region: a region is a group of states that have one or more of the following in common: (1) location, (2) landforms, (3) climate, and (4) way of life, etc.*
- I. Key Vocabulary:
1. Region
 2. North
 3. South
- J. Procedures:
1. Introduce students to regions. A region may be defined by: (1) location, (2) landforms, (3) climate, and (4) way of life. Briefly discuss regions of the world
 2. Introduce the American West as a region inside of a country. Explain that the American West got its name because it is located in the western section of the contiguous USA. Write the word "contiguous" and its meaning on the board and explain, by referring to the map of the USA, that it means those states of the USA that touch each other, as opposed to Hawaii or Alaska.
 3. Brainstorm with the students the advantages of grouping places into regions. Emphasize that grouping places into regions is a way of classifying that makes it easier to see what these places have in common.
 4. Display the sentence strip and point out the North and South regions which are made up of groups of states.
 5. Allow time for students to do the attached worksheet (Insert A).
 6. Close by telling the students it would help for them to remember what the terms region, North, and South mean for the upcoming American Geography lessons which will discuss the differences between North and South and how these differences led to the bloodiest war in American History, the American Civil War of 1861 to 1865.

Lesson 15: (Day 2): "North and South in the 1800s (Part 1)"

- A. Daily Objectives:
1. Lesson Content:
 - a. Read special purpose maps of the North and South during the early 1800s.
 - b. Interpret information from these maps and use this information to explain the differences between the North and South.
 2. Concept Objective:
 - a. Students will be able to contrast the North and South in the 1800s using special purpose maps.
 3. State Standards (5th Grade – Social Studies):
 - a. Standard 10, Objective 2a. Compare geography of the northern and southern states and its influence on agriculture and industry.
 - b. Standard 10, Objective 2b. Examine maps of the United States from 1800 to 1860.

B. Materials:

1. Worksheet (Insert B)
2. Maps (BCP Geography Lesson 15)
3. Sentence strip containing the following definition: *Region: a region is a group of states that have one or more of the following in common: (1) location, (2) landforms, (3) climate, and (4) way of life, etc.* (from Lesson 14)

C. Key Vocabulary:

1. Missouri Compromise
2. Agricultural
3. Manufacturing
4. Region

D. Procedures:

1. Introduce the students to the Missouri Compromise Line.
2. Review examples of Northern states (New York, Pennsylvania, New Jersey, etc.) and some examples of Southern states (Louisiana, North Carolina, Georgia, etc.) from the previous lesson.
3. Review differences between the Northern and Southern states (land formations, slavery, etc.).
4. Introduce vocabulary terms.
5. Display the sentence strip containing the definition of the word "region" from the prior American History lesson.
6. Identify the "special information" on maps, (i.e. the titles and keys to the maps). Explain that the maps used in this lesson will provide specific information about regions of the North and the South.
7. Also, point out the connection between maps. (This comparison would be easier if students had the maps in question laid out side by side. This requires copies of the maps for individual students' use. Activities 4 and 6 on this lesson's worksheet call for comparisons of two or more maps.) Use two maps, for example the maps titled "Cotton Production and Industry in 1860" and "Slave Population in 1860." Draw attention to the fact that these are two different maps of the same regions, the North and South, in the same year, 1860. Show the students the correlation between the areas where cotton is produced and where slaves make up a majority of the county population. This correlation between the maps should set them thinking whether there is any connection between slaves and cotton in 1860 (slaves provided labor on cotton plantations).
8. Allow time for the students to work on the worksheets and discuss them as a class. (Insert B)

Lesson 24 (Day 3): "Toward the Civil War (Part 1)"

A. Daily Objectives:

1. Lesson Content:
 - a. Economic and Social differences between Northern and Southern States.
 - b. Missouri Compromise of 1820.
2. Concept Objective:

- a. Student will be able to identify two causes of the American Civil War: (1) different ways of life in the North and South, and (2) the issue of paid labor versus slave labor.
 - b. Students will evaluate the impact of the Mason-Dixon Line, the regional differences between the industrial North and the agricultural South, and the Missouri Compromise of 1820, and the division among Americans in the 1800s.
3. State Standards (5th Grade – Social Studies):
- a. Standard 10, Objective 2c. Identify the Northern and Southern States in the Civil War.
 - b. Standard 6, Objective 2a. Examine reasons for the Civil War.

B. Materials:

1. Sentence strip containing time-line (begun in prior World History lessons)
2. Classroom-size map of the USA
3. Map of Missouri Compromise of 1820, (BCP History Lesson 24) - one copy per student or a transparency
4. Fact sheet titled “Two Causes of the American Civil War,” attached (Insert C)

C. Key Vocabulary:

1. Mason-Dixon Line
2. Civil War

D. Procedures:

1. Anticipatory Set: Have this question written on the board: What are possible reasons for the Civil War?
 - a. Have the students write their answers on a piece of paper as they come in. At the beginning of class, open up a discussion of their answers.
2. Be prepared to tell the students that in the 1800s, the USA fought the American Civil War; the Union in the North and the Confederacy in the South. Write the words "Union" and "Confederacy" on the board.
3. Have students read and discuss the fact sheet titled, "Two Causes of the American Civil War" (Insert C). Tell the students that when reading for information they may use strategies that are different from the strategies they use when they are reading for entertainment. Explain that in reading for information, they must locate the most important facts. In doing so, they may highlight or underscore paragraphs or lines that they think are important. Tell the students that they may re-read a line or a paragraph. As preparation for a class discussion, students may be assigned to read and discuss the fact sheet in pairs.
4. Show students pictures of scenes that illustrate the differences between the ways of life of the industrial North and the agricultural South. "America, North and South," Chapter Two of *A Nation Torn* by Delia Ray includes black-and-white pictures that are suitable for this purpose. Show students pictures of slave and plantation life in the South and ask students for their comments on what they have seen and read in this lesson.

5. Finally, suggest appropriate reading materials to interested students.
- E. Oral discussion of the fact sheet. Possible questions are in BCP History Lesson 24. (Sample: How did the settlement of Missouri affect the unity of the USA in 1820?)

Lesson 25 (Day 4): “Toward the Civil War (Part 2)”

- A. Daily Objectives:
1. Lesson Content:
 - a. Two more causes of the Civil War.
 - b. Harriet Beecher Stowe’s *Uncle Tom’s Cabin*.
 - c. Dred Scott Decision.
 - d. John Brown incident.
 2. Concept Objective:
 - a. Students will identify two more causes of the American Civil War: (1) morality of slavery and (2) states’ rights.
 - b. Students will evaluate the effect of Harriet Beecher Stowe’s *Uncle Tom’s Cabin*, the Dred Scott Decision of the US Supreme Court, the John Brown incident, and slavery in dividing Americans in the 1800s.
 3. State Standards (5th Grade – Social Studies):
 1. Standard 10, Objective 2c. Identify the Northern and Southern states in the Civil War.
 2. Standard 6, Objective 2a. Examine reasons for the Civil War.
- B. Materials:
1. Sentence strip containing time-line (begun in prior American History class)
 2. Fact sheet titled “Two More Causes of the American Civil War,” (Insert D)
 3. Classroom-size map of the USA
 4. Map of the Missouri Compromise of 1820, (from Lesson 24)
- C. Procedures:
1. Review information learned in previous lesson.
 2. Distribute copies of the fact sheets titled "Two More Causes of the American Civil War" (Insert D) to the students, and tell them they will be reading for information. As preparation for a class discussion, students may be assigned to read and discuss the fact sheet in pairs.
 3. Read & discuss the fact sheet titled "Two More Causes of the American Civil War" (Insert D).
- E. Oral discussion of the fact sheet using discussion questions from BCP History Lesson 25. (Sample: Ask the students to discuss the advantages and disadvantages of using a novel to convince people that slavery was wrong.)

Lesson 26 (Day 5): “Toward the Civil War (Part 3): Lincoln”

- A. Daily Objectives:
1. Lesson Content:
 - a. Election of Abraham Lincoln.
 - b. Secession of Southern states.

- c. Events that occurred before the outbreak of the Civil War.
- 2. Concept Objective:
 - a. Students will be able to examine the event (including the election of Lincoln as president) that led to the outbreak of the American Civil War.
 - b. Student will be able to discuss a settlement that would have prevented the American Civil War from happening.
- 3. State Standards (5th Grade – Social Studies):
 - a. Standard 10, Objective 2c. Identify the Northern and Southern States in the Civil War.
 - b. Standard 6, Objective 2a. Examine reasons for the Civil War.

B. Materials:

- 1. Fact sheet titled “The Union is Dissolved!,” (Insert E)
- 2. Sentence strip containing time-line (continued from previous American History lessons)
- 3. Map of the Union and the Confederacy (BCP History Lesson 26)

C. Procedures:

- 1. Anticipatory Set: Have written on the board:
 - a. Pretend you are the newly elected President of the United States. What political solutions would you use to prevent the Civil War?
 - b. Tell the students they have been given unlimited power to negotiate a settlement to prevent a war between the North and South. Have the students answer the question on the board. Remind them to consider the impact of the changes they propose.
- 2. Review the issues that divided the North and South in the 1850s (paid labor versus slave labor, industrial North versus agricultural South, slavery, states' rights), and the incidents that most people in the North and South would be discussing in the late 1850s (Dred Scott Decision, slavery, John Brown's attack on Harper's Ferry and his execution).
- 3. Ask the students to state what attitudes the North and South held toward each other after the publication of *Uncle Tom's Cabin*, the Dred Scott Decision, and especially the execution of John Brown (distrust, suspicion, hostility).
- 4. Preview the fact sheet (Insert E) by telling the students the title and explaining what the term "Union" means (USA) and why the USA is called a union (grouping of states). Ask: What does the term "dissolved" mean? (broken) Ask: What would you expect to read about in a fact sheet titled "The Union is Dissolved!" (Answers may vary.) If students do not explain the title, tell them that in reference to the Union, "dissolved" means "broken."
- 5. Ask the students to think of which region, the North or South, might secede from the Union. (Answers may vary.)
- 6. Ask the students to recall the information in previous American History lessons and decide what events or issues suggest that states had for some time been considering breaking away (issue of states' rights). Explain that the issue of states' rights included

the question of whether a state had the right to leave the Union, or secede.

7. Distribute the fact sheet (Insert E) to the students.
 8. Remind the students that in prior American History lessons, the unofficial boundary of the North and South was the Missouri Compromise Line of 1820 which included the Mason-Dixon Line. Point out to students that not all the states that had been considered Southern states, seceded. Point to the fact that Maryland, Missouri, and Kentucky (all slave states) did not secede. Point out not every Southern state nor did every slave state joined the Confederate States of America. Ask the students to think of reasons why Southern states such as Maryland, Missouri, and Kentucky did not secede. Point also to the fact that since the Missouri Compromise of 1820, the map of the USA had changed and that by 1861, several western states such as California and Oregon had joined the Union. Remind the students that the admission of western states to the Union and the issue of whether they should enter as slave states or free states had posed a problem for the USA from the time of the Missouri Compromise of 1820.
- D. Oral discussion of the fact sheet using discussion questions from BCP History Lesson 26. (Sample: Discuss ways in which people running for public office in the 1800s got their message across to the voters [handbills, posters, public debates, newspaper reports]. Ask the students to list some of the means of communication available now but not available to Lincoln and Douglas [radio, TV] and to discuss the difficulties Lincoln and Douglas might have faced reaching voters outside their states and how they might have overcome these difficulties.)

Lesson 27 (Day 6) - “The Civil War (Part 1)”

A. Daily Objectives:

1. Lesson Content:
 - a. Start of the physical fighting in the Civil War.
 - b. Attack on Fort Sumter.
 - c. Leadership of President Jefferson Davis of the Confederacy.
 - d. Disadvantages for Confederate soldiers.
2. Concept Objective:
 - a. Students will examine the events surrounding the Confederate attack on Fort Sumter and its relation to the Civil War.
 - b. Students will describe the leadership of Jefferson Davis, Confederate president, at the start of the Civil War.
3. State Standards (5th Grade – Social Studies):
 - a. Standard 10, Objective 2c. Identify the Northern and Southern States in the Civil War.
 - b. Standard 6, Objective 2a. Examine reasons for the Civil War.

B. Materials:

1. Classroom-size map of the US
 2. Sentence strip containing time-line (begun in prior American History lessons)
 3. Map of the Union and the Confederacy, (from Lesson 26)
- C. Key Vocabulary:
1. Fort Sumter
 2. Jefferson Davis
- D. Procedures:
1. Using books from the “Suggested Books” section of BCP History Lesson 27, circulate pictures of Fort Sumter and the battle that ensued there. Ask students to comment on them.
 2. Present to the students the importance of Fort Sumter: (1) not only was it a fort that any side could use in a war, but (2) it guarded one of the most important shipping ports in the South, (Charleston harbor).
 3. Discuss the events that led up to the first shot of the Civil War.
 4. Introduce Jefferson Davis and describe some of his background.
 5. Discuss differences between Lincoln’s and Davis’ political ideas.
 6. Discuss how Davis’ leadership affected the Confederate Army.
- E. Assessment:
1. Ask the students to summarize one thing that they learned that they didn’t know before.

Lesson 28 (Day 7) – “The Civil War (Part 2)”

- A. Daily Objectives:
1. Lesson Content:
 - a. First Battle of Bull Run
 - i. Weather
 - ii. Location
 - iii. Material conditions of the battle
 2. Concept Objectives:
 - a. Students will be able to discuss the lessons the North and South could have learned from the First Battle of Bull Run.
 3. State Standards (5th Grade – Social Studies):
 - a. Standard 6, Objective 2a. Examine reasons for the Civil War.
- B. Materials:
1. Classroom-size map of the USA
 2. Sentence strip containing time-line (begun in prior American History lessons)
 3. Map of the Union and the Confederacy, (from Lesson 26)
- C. Vocabulary:
1. First Battle of Bull Run
- D. Procedures:
1. Begin the lesson by asking students how the Battle of Fort Sumter could have been the end of the Civil War?
 2. Discuss the two armies ie: their nicknames (Yankees or Yanks – teach the background of “Yankee Doodle”, and Rebels or Rebs), and their uniform colors.

3. On a map, show the students the location of Bull Run and the town of Manassas and discuss why it was strategically important to both sides.
 4. Discuss the conditions of the war and how the Confederate Army eventually won it.
- E. Ask your students to discuss the following issue:
1. No one died in the attack on Fort Sumter. However, the First Battle of Bull Run or the Battle of Manassas claimed many lives. The American Civil War went on until 1865. Discuss what both sides could have learned from the First Battle of Bull Run and how the North and the South could have responded to these lessons.

VIII. FINAL ASSESSMENT (Day 8)

- K. Use final assessment for Baltimore Curriculum Project 5th Grade, March Geography Lessons 14 -16, and March History Lessons 24-28

IX. HANDOUTS/WORKSHEETS

See Inserts A, B, C, D, E

X. BIBLIOGRAPHY

Freedman, Russell. Lincoln: A Photobiography. New York: Clarion, 1987

Hakim, Joy. A History of US: War, Terrible War. New York: Oxford University Press, 1994.

Hirsch, E. D., ed. What Your 5th Grader Needs to Know. New York: Doubleday, 1993.

Stampp, Kenneth M. The Causes of The Civil War. Englewood Cliffs: Prentice Hall, 1974.

Language Arts/Reading Lesson Unit Plan

Poetic Justice: A Study of Poe's Famous Works

Grade Level: 7th

Length of Unit: 9-10 Days

I. UNIT OVERVIEW

This unit will explore some of Edgar Allan Poe's most famous literary works. This unit is designed to enable students to appreciate the works of the father of the modern short story. Students will study the master at work in several literary genres: short story, characterization, and interpretation. Skills include appreciation of cultural differences, literary devices, and creating original stories.

This unit will be taught in conjunction with the lessons that introduce homophones and letter types in the Shurley English textbooks. Shurley English is a daily program to reach children with different learning abilities, to instill a love of learning, and to give students a solid skill foundation. The concepts are taught in a step-by-step manner and all material is reviewed (spiral learning) and rehearsed in a way as to allow students the necessary independence for these concepts to become an integral part of their repertoire. Research supports Shurley English as a curriculum that contains the key elements to effectively promote the development of language so students can communicate and participate successfully in their society.

II. OBJECTIVES

A. Concept Objectives:

1. Students will recognize and understand the distinguishing features of genres.
2. Students will understand how literary and plot devices are employed to move a written text.

B. Core Knowledge Content:

3. "The Tell-Tale Heart" - Grade 7, English
4. "The Purloined Letter" - Grade 7, English
5. Literary Elements - Grade 7, English
6. Coordinate Planes, Grade 7, Math
7. Geometry, Grade 7, Math

C. State Standards:

8. 7th Grade – Language Arts:
 - a. Standard 1, Objective 1a. Identify common prefixes and suffixes to determine the meaning of words.
 - b. Standard 1, Objective 1b. Identify the literal meanings and shades of meaning of words.
 - c. Standard 1, Objective 1c. Determine word meaning through definition or explanation context clues.
 - d. Standard 1, Objective 1d. Distinguish between commonly confused words (i.e. Homophones).
 - e. Standard 1, Objective 3a. Identify narrative plot structure.
 - f. Standard 1, Objective 3b. Describe a character's traits as revealed by the narrator.

- g. Standard 1, Objective 3d. Identify descriptive details and imagery that establish setting.
 - h. Standard 2, Objective 1a. Retell significant events in sequence.
 - i. Standard 2, Objective 1b. Summarize essential information from literary or informational text.
 - j. Standard 2, Objective 1c. Connect text to self.
 - k. Standard 2, Objective 2a. Determine audience and purpose for extended writing.
 - l. Standard 2, Objective 2b. Relate a clear, coherent, chronologically-sequenced incident, event, or situation with simple reflection.
 - m. Standard 2, Objective 2c. Use sensory details.
 - n. Standard 2, Objective 3a. Evaluate and revise for:
 - Use of a unifying idea or topic.
 - A clear beginning, middle, and end with sequential transitions.
 - Appropriate tone and voice.
 - Appropriate word choice for topic.
 - Varied sentence beginnings and sentence length.
 - o. Standard 2, Objective 3b. Edit for:
 - Correct grade level spelling.
 - Correct use of commas in a series.
 - Correct subject-verb agreement.
 - Correct use of possessives.
 - Correct capitalization of sentence beginnings and proper nouns.
 - Correct end punctuation on simple and compound sentences.
2. 7th Grade - Mathematics:
- a. Standard 4, Objective 1c. Draw, label, and describe attributes of angles, triangles, and quadrilaterals.
3. 7th Grade – Pre-Algebra:
- a. Standard 3, Objective 3a. Identify approximate rational coordinates when given the graph of a point on a rectangular coordinate system.
 - b. Standard 3, Objective 3b. Graph ordered pairs of rational numbers on a rectangular coordinate system.
4. 7th Grade – United States Government and Citizenship:
- c. Standard 1, Objective 2b. Investigate the major ideas of the Declaration of Independence, the Constitution, and other writings.
 - d. Standard 1, Objective 3d. Examine how the rule of law affects everyday life.
 - e. Standard 2, Objective 1a. Determine the rights and liberties outlined in the Bill of Rights.
 - f. Standard 2, Objective 1b. Examine how the Bill of Rights promotes civil rights and protects diversity.
 - g. Standard 2, Objective 2a. Examine how the Bill of Rights promotes a just legal system.
 - h. Standard 6, Objective 1a. Explain the purpose of government and analyze how government powers are acquired used and justified.

- i. Standard 6, Objective 1b. Compare different political systems with that of the United States.
- 5. 7th Grade – American History I:
 - a. Standard 6, Objective 4b. Examine the Bill of Rights and its specific guarantees.

VIII. BACKGROUND KNOWLEDGE

- A. For Teachers: Kennedy, X.J. Literature: An Introduction to Fiction, Poetry, and Drama. Boston: Little, Brown, and Company, 1989.
- B. For Teachers: Hutchisson, James M. Poe. Jackson: University Press of Mississippi. 2005.

IX. RESOURCES

Hirsch, Jr. E.D. What Your Sixth Grader Needs to Know. New York: Dell Publishing, 1993. ISBN 0-385-31467-1

X. PRE-ASSESSMENT

- A. Students will write a short story in a gothic style. This should be assigned as a homework assignment a few days before the unit to allow the teacher to review what the children already know.
- B. Note: This is a standard lesson. Students designated as Advanced in Language Arts/Reading have been previously placed in their appropriate level (Language Arts 8, Utah Online High School,...) based on their initial or on-going assessments. The students designated as Basic will be receiving small group or one-on-one instruction through the Tutor Intervention Program (TIP). In an extreme case, a Basic student may attend a lower grade's Standard class.

XI. EXTENSION

- A. The students who complete each daily task early will be encouraged to read Poe's "The Raven." They can practice reading it aloud and have an opportunity to present a section of it to the class during the final lesson.

XII. LESSONS

Lesson One (Day 1): "Gothic City" - A study of the gothic tale

- A. Daily Objectives:
 - 1. Lesson Content:
 - a. Edgar Allen Poe.
 - b. Gothic story elements.
 - 2. Concept Objective:
 - a. Students will recognize and understand the distinguishing features of the gothic tale genre.
 - 3. State Standards (7th Grade – Language Arts):
 - a. Standard 1, Objective 1b. Identify the literal meanings and shades of meaning of words.
 - b. Standard 1, Objective 1c. Determine word meaning through definition or explanation context clues.
 - c. Standard 1, Objective 3d. Identify descriptive details and imagery that establish setting.
 - d. Standard 2, Objective 1c. Connect text to self.
- B. Materials:
 - 1. Literature by X.J. Kennedy.

2. ABC Adjective List – Insert A.
3. Feeling cards and Plot/Story cards - Insert B.
4. Poe Biography-Insert C.
5. Setting Map – Insert D.
6. Journal.

C. Key Vocabulary:

1. Gothic
2. Comedic
3. Romantic
4. Protagonist
5. Antagonist

D. Procedures:

1. Invite students to define the vocabulary words.
2. Discuss the dictionary definitions. Have students add adjectives to describe a gothic story to their ABC Adjective list-Insert A.
3. Show plot/story cards-comedic and romantic – Insert B. Discuss the feelings that these pictures invoke and how these scenes differ from a gothic scene.
4. Give students background on Edgar Allan Poe’s life – Insert C. Discuss whether or not his own life lends itself to a gothic tale.
5. Have students use their knowledge of gothic literary elements and the Poe biographical information to create an original gothic setting using Poe as the protagonist. Use the Setting Map – Insert D.
6. Journal Entry/Re-teach Time – Discuss how a gothic tale is different from a straight-forward mystery you’ve read recently. *Re-teach students that are having difficulty with the concept introduced to this point.

E. Assessment:

1. Oral discussion of gothic literary devices.
2. Journal Entry.
3. Setting Map.

Lesson Two: (Day 2): “It’s The Pits”

A. Daily Objectives:

1. Lesson Content:
 - a. "The Pit and the Pendulum."
 - b. Literary elements.
2. Concept Objective:
 - b. Students will understand how literary and plot devices are used to move a written text.
3. State Standards (7th Grade – Language Arts):
 - c. Standard 1, Objective 1b. Identify the literal meanings and shades of meaning of words.
 - d. Standard 1, Objective 1c. Determine word meaning through definition or explanation context clues.
 - e. Standard 1, Objective 3a. Identify narrative plot structure.
 - f. Standard 2, Objective 1c. Connect text to self.
 - b. Materials:
4. “The Pit and the Pendulum” by Tom Doherty.
5. Story Vocabulary - Insert E.
6. Story Map - Insert F.

7. Journal.
 8. "The Pit and the Pendulum" Quiz – Insert G.
 - c. Key Vocabulary:
 9. Story Vocabulary-Insert E.
 - d. Procedures:
 10. Define and discuss the vocabulary words listed on Story Vocabulary-Insert E.
 11. Read the first two paragraphs of "The Pit and the Pendulum" aloud. Ask students to identify the setting.
 12. Have the students predict the ending to "The Pit and The Pendulum."
 13. Have students read the rest of the story.
 14. Students will take notes and discuss their findings of gothic literary elements in the story.
 15. Create a story map as a class.
 16. Journal Entry/Re-teach Time – Discuss what you feel would be the worst form of torture through which you could go from the ones that are mentioned in "The Pit and the Pendulum." *Re-teach students that are having difficulty with the concept introduced to this point.
 17. Give "The Pit and the Pendulum" Quiz – Insert G.
- B. Assessment:
1. Class Discussion of literary elements.
 2. Story Map.
 3. Journal Entry.
 4. Quiz.

Lesson Three (Day 3): "The Pit or the Polygon?"

- A. Daily Objectives:
1. Lesson Content:
 - a. "The Pit and the Pendulum"
 - b. Geometry
 2. Concept Objective:
 - a. Students will recognize and understand the distinguishing features of the gothic genre.
 3. State Standards (7th Grade - Math):
 - a. Standard 4, Objective 1c. Draw, label, and describe attributes of angles, triangles, and quadrilaterals.
- B. Materials:
1. "The Pit and the Pendulum"
 2. Pattern blocks
 3. Protractor
 4. Graphing paper
- C. Key Vocabulary:
1. Polygon
 2. Right angle
 3. Obtuse angle
 4. Geometry
- D. Procedures:
1. Reread passages from The Pit and the Pendulum pages 145-147.
 2. Discuss the references to mathematical terms within these pages.
 3. Discuss vocabulary terms.

4. Have students identify polygons and their angles using pattern blocks and a protractor.
5. Have students use the dimensions used in the story to create a scale drawing on graph paper of the pit making sure that they calculate area, the angle types, and the shape of the pit.
6. Journal Entry/Re-teach Time – Why does Poe delve so deeply into the mathematical concept of geometry when discussing the pit? Do you feel this detail is necessary? *Re-teach students that are having difficulty with the concept introduced to this point.

E. Assessment:

1. Scale drawing.
2. Journal.

Lesson Four (Day 4): “France and the U.S. Square Off on the Issue of Search and Seizure”

A. Daily Objectives:

1. Lesson Content:
 - a. "The Purloined Letter"
 - b. Search and seizure laws
2. Concept Objective:
 - a. Students will understand the distinguishing features of the gothic genre.
 - b. Students will be aware of the use of literature as an aid in understanding social issues.
 - c. Students will compare and contrast the laws in the U.S. and French governments regarding search and seizure.
3. State Standards (7th Grade – United States Government and Citizenship):
 - a. Standard 1, Objective 2b. Investigate the major ideas of the Declaration of Independence, the Constitution, and other writings.
 - b. Standard 1, Objective 3d. Examine how the rule of law affects everyday life.
 - c. Standard 2, Objective 1a. Determine the rights and liberties outlined in the Bill of Rights.
 - d. Standard 2, Objective 1b. Examine how the Bill of Rights promotes civil rights and protects diversity.
 - e. Standard 2, Objective 2a. Examine how the Bill of Rights promotes a just legal system.
 - f. Standard 6, Objective 1a. Explain the purpose of government and analyze how government powers are acquired used and justified.
 - g. Standard 6, Objective 1b. Compare different political systems with that of the United States.
 - h. State Standards (7th Grade – American History I):
 - i. Standard 6, Objective 4b. Examine the Bill of Rights and its specific guarantees.

B. Materials:

1. “The Purloined Letter” by Tom Doherty.
2. 4th Amendment from the U.S. Constitution-Insert H.
3. Venn Diagram worksheet-Insert I.
4. Journal.

C. Vocabulary:

1. ‘Search and seizure.’
2. Search warrant.

3. Story vocabulary-Insert E.
- D. Procedures:
1. Invite discussion on the vocabulary words. Guide students in reaching the correct definition.
 2. Have students read silently pages 192-193 in “The Purloined Letter.”
 3. Have students identify the French way of searching for stolen items.
 4. Discuss our laws regarding search and seizure (Insert H).
 5. Have students complete a Venn Diagram (Insert I) comparing and contrasting the French and U.S. laws regarding search and seizure.
 6. Journal Entry/Re-teach Time– Do you think the French or the United States has the fairest laws regarding search and seizure? *Re-teach students that are having difficulty with the concept introduced to this point.
- E. Assessment:
1. Venn Diagram.
 2. Journal.

Lesson Five (Day 5): “If You’re Going to Write a Letter, Make Sure it’s Right!”

- A. Daily Objectives:
1. Lesson Content:
 - a. "The Purloined Letter"
 - b. Letter Writing
 2. Concept Objective:
 - a. Students will understand the distinguishing features of the gothic genre.
 - b. Students will identify and use correctly the format for a friendly letter and a business letter.
 3. State Standards (7th Grade – Language Arts):
 - a. Standard 2, Objective 1a. Retell significant events in sequence.
 - b. Standard 2, Objective 1b. Summarize essential information from literary or informational text.
 - c. Standard 2, Objective 1c. Connect text to self.
- B. Materials:
1. Transparencies of business and friendly letters from Shurley English textbook.
 2. White paper
 3. Blue or black pen
 4. Overhead
 5. “The Purloined Letter” Quiz – Insert J
- C. Procedures:
1. Model the correct format and tone for both a friendly letter and a business letter.
 2. Discuss Mr. Perfect’s ineptness when it came to finding the stolen letter.
 3. Have one-half of the class write a friendly letter and have the other half write a business letter to Mr. Perfect telling him how they could have solved the case faster.
 4. Journal Entry/Re-Teach Time – Which type of letter would you rather write to Mr. Perfect – a friendly letter or a business letter? Why? *Re-teach students that are having difficulty with the concept introduced to this point.
 5. Give “The Purloined Letter” Quiz – Insert J.

- D. Assessment:
1. Journal
 2. Letter Writing
 3. Quiz

Lesson Six (Day 6) - "The Purloined Letter-Coordinated!"

- A. Daily Objectives:
1. Lesson Content:
 - a. "The Purloined Letter"
 - b. Coordinate planes
 2. Concept Objective:
 - a. Students will use the coordinate system correctly as evidenced by their finding a city on a map.
 - b. Students will understand the distinguishing features of gothic genre.
 3. State Standards (7th Grade – Pre-Algebra):
 - a. Standard 3, Objective 3a. Identify approximate rational coordinates when given the graph of a point on a rectangular coordinate system.
 - b. Standard 3, Objective 3b. Graph ordered pairs of rational numbers on a rectangular coordinate system.
- B. Materials:
1. Graphing Paper
 2. World Map
 3. Colored Pencils
 4. Journal
 5. Coordinate Graphing Sheet - Insert K
 6. Key Vocabulary:
 - a. Coordinate
 - b. Ordered Pair
- C. Procedures:
1. Reread page 204 of "The Purloined Letter."
 2. Discuss why Mr. Dudin thinks it important that one be able to graph.
 3. Review vocabulary.
 4. Use coordinate graphing to model how to find a city on a map.
 5. Have the students locate Paris using coordinates.
 6. Coordinate graphing worksheet on settings involved in Poe's stories-Insert K.
 7. Journal Entry/Re-teach Time – Who is better at asking for directions in your family? Why do you think this is so? *Re-teach students that are having difficulty with the concept introduced to this point.
- D. Assessment:
1. Graphing Sheet
 2. Journal Entry

Lesson Seven (Day 7) – "The Tell-Tale or Tail Heart"

- A. Daily Objectives:
1. Lesson Content:
 - a. "The Tell-Tale Heart"
 - b. Homophones
 2. Concept Objectives:
 - a. Students will understand how literary devices are employed to move a written text.

- b. Students will identify homophones and use them correctly.
- 3. State Standards (7th Grade – Language Arts):
 - a. Standard 1, Objective 1a. Identify common prefixes and suffixes to determine the meaning of words.
 - b. Standard 1, Objective 1b. Identify the literal meanings and shades of meaning of words.
 - c. Standard 1, Objective 1c. Determine word meaning through definition or explanation context clues.
 - d. Standard 1, Objective 1d. Distinguish between commonly confused words (i.e. Homophones).
- B. Materials:
 - 1. Pear.
 - 2. Pair of shoes.
 - 3. Poe’s Homophones sheet-Insert L.
 - 4. Journal.
 - 5. The “Tell-Tale Heart” by Tom Doherty.
- C. Vocabulary:
 - 1. Story vocabulary-Insert E.
 - 2. Homophone
- D. Procedures:
 - 1. Read the “The Tell-Tale Heart” aloud.
 - 2. Discuss what makes the story a gothic tale.
 - 3. Discuss story vocabulary.
 - 4. Define homophones using a pear and a pair of shoes.
 - 5. Homophone sheet – Insert L.
 - 6. Journal Entry/Re-teach Time – “The Tell-Tale Heart” is the shortest story we’ve studied. Do you still feel this story is worthy of being included in the gothic genre? Defend your answer. *Re-teach students that are having difficulty with the concept introduced to this point.
 - 7. Give “The Tell-Tale Heart” Quiz – Insert P
- E. Assessment:
 - 1. Homophone sheet
 - 2. Journal Entry
 - 3. Quiz

Lesson Eight (Day 8) – “What a Character!”

- A. Daily Objectives:
 - 1. Lesson Content:
 - a. "The Tell-Tale Heart"
 - b. Homophones
 - 2. Concept Objectives:
 - b. Students will understand how literary devices are employed to move a written text.
 - c. Students will identify homophones and use them correctly.
 - 3. State Standards (7th Grade – Language Arts):
 - a. Standard 1, Objective 3b. Describe a character’s traits as revealed by the narrator.
- B. Materials:
 - 1. Edgar Allen Poe: A Collection of Stories by Tom Doherty.
 - 2. Character Study – Insert M.
 - 3. Journal.

C. Vocabulary:

1. Protagonist
2. Antagonist
3. Hero/Heroine

D. Procedures:

1. Discuss how the characters contribute to the story as a gothic tale.
2. Discuss vocabulary.
3. Complete the Character Study – Insert M.
4. Journal Entry/Re-teach Time - Describe yourself as a character in a book. *Re-teach students that are having difficulty with the concept introduced to this point.

E. Assessment:

- a. Character Study
- b. Journal Entry

CULMINATING ACTIVITY Lesson Eight (Day Eight) – “Make ‘em Happy!”

A. Daily Objectives:

1. Lesson Content:
 - a. Literary Terms
 - b. Creative Writing
2. Concept Objectives:
 - a. Students will recognize and understand the distinguishing features of genres.
 - b. Students will understand how literary and plot devices are employed to move a written text.
3. State Standards (7th Grade – Language Arts):
 - a. Standard 2, Objective 2a. Determine audience and purpose for extended writing.
 - b. Standard 2, Objective 2b. Relate a clear, coherent, chronologically-sequenced incident, event, or situation with simple reflection.
 - c. Standard 2, Objective 2c. Use sensory details.
 - d. Standard 2, Objective 3a. Evaluate and revise for:
 - Use of a unifying idea or topic.
 - A clear beginning, middle, and end with sequential transitions.
 - Appropriate tone and voice.
 - Appropriate word choice for topic.
 - Varied sentence beginnings and sentence length.
 - e. Standard 2, Objective 3b. Edit for:
 - Correct grade level spelling.
 - Correct use of commas in a series.
 - Correct subject-verb agreement.
 - Correct use of possessives.
 - Correct capitalization of sentence beginnings and proper nouns.
 - Correct end punctuation on simple and compound sentences.

B. Materials:

1. Paper for Storyboards (comic-strip style).
2. Paper.

3. Markers.
4. Pens/Pencils.
5. Construction paper.

C. Procedures:

1. Review gothic literary terms.
2. Have groups brainstorm ways in which they could lighten-up one of Poe's stories.
3. Have groups rewrite the ending to a Poe story.
4. Have students make a storyboard out of their story.
5. Allow groups to present their happy endings.
6. Journal Entry/Re-teach Time – How did your group decide on which story they wanted to write about? *Re-teach students that are having difficulty with the concept introduced to this point.

D. Assessment:

1. Storyboard and Oral Presentations.
2. Journal Entry.

XIII. FINAL ASSESSMENT (Day Nine)

A. Procedure:

1. Students will be assigned to revise and edit their original gothic story (from the pre-test) as a final assessment. The teacher may want to extend this to a two-day lesson for more editing instruction.
2. If time is available, the student could organize into groups for "Author's Chair" to share their stories with each other.

B. Assessment:

1. Revised Gothic Story.

XIV. BIBLIOGRAPHY

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Kennedy, X. J. Literature: An Introduction to Fiction, Poetry, and Drama. Boston: Little, Brown and Company, 1989. ISBN 78-61737

Sampson, Mary and Michael Sampson. Pathways to Literacy: Strategies from the Bill Martin, Jr. Workshop. Commerce, TX: Institute of Literacy Learning, 1994

Directed Learning ‘Club Time’ Lesson Unit Plan

Science, What’s Your Method?

Grade Level: 6th – 8th,

Length of Unit: 8 lessons

I. UNIT OVERVIEW

Inspire and encourage the love of learning through science. Introduce students to the scientific method, logical reasoning, and ethical decision making, by way of experiments, interesting historical stories, and debate.

II. OBJECTIVES

A. Concept Objectives:

1. Students will list and recognize the steps in the scientific method.
2. Counterintuitive thinking: students will be introduced to ways your mind can be easily fooled / ways to detect those illusions.
3. Students will participate in Petri dish growth.
4. Students will participate in hands-on experimentation methods.
5. Students will be introduced to situations where keeping an open mind can save lives and change the world.
6. Students will participate in a discussion of learning from mistakes and preventing catastrophes.
7. Students will observe practical applications of innovative thinking.
8. Students will learn of real-life situations where ethics played a major role.
9. Students will build models for structural integrity.
10. Students will be introduced to stories that show a healthy skepticism in scientific matters.
11. Students will be introduced to the concept of ‘Cause and Correlation.’
12. Students will participate in research and debate for the topics of tobacco and immunizations.
13. Students will be able to calculate volume.

III. RESOURCES

- A. Summers, Judith. Soho -- A History of London's Most Colourful Neighborhood, Bloomsbury, London, 1989, pp. 113-117.
- B. “Jon Snow, a Historical Giant,” <http://www.ph.ucla.edu/epi/snow.html>
- C. Edward Zaccaro, The 10 Things All Future Mathematicians and Scientists Must Know (But Are Rarely Taught), Hickory Grove Press, 2003
- D. Edward Zaccaro, Challenge Math For the Elementary and Middle School Student, Hickory Grove Press, 2005

IV. PRE-ASSESSMENT

- A. Students will write a brief description of what they know, and what they would like to know about how to conduct scientific experiments using the scientific method (KWL).

Note: This is a Standard lesson. Students designated as Advanced in Mathematics have been previously placed in their appropriate levels (Math 2, Math 3,...) based on their initial or on-going assessments. The students designated as Basic will be

receiving small group or one-on-one instruction through the Tutor Intervention Program (TIP). In an extreme case, a Basic student may attend a lower grade's Standard class.

V. LESSONS

Lesson One (Day 1): Scientific Method

A. Daily Objectives:

1. Lesson Content:
 - a. Scientific method and terminology.
 - b. Students will list and recognize the steps in the scientific method.
2. Concept Objective:

B. Materials:

1. Map of Cholera Outbreak on a transparency (Insert A).
2. Scientific Method Worksheet (Insert B).

C. Vocabulary:

1. Hypothesis
2. Observation
3. Theory

[Note: Explain vocabulary terms as they arise in the readings.]

D. Procedures:

1. Relate the story of Dr. Snow and the Cholera epidemic, pages 113-117 of Soho -- A History of London's Most Colourful Neighborhood, where he discovers the cause to be a contaminated well. Display Map (Insert A) on an overhead.
2. Introduce the steps of the scientific method.
3. Have students fill out the Scientific Method Worksheet (Insert B) using Dr. Snow's experience with the Cholera epidemic. This may be done individually or as a class.

E. Assessment:

1. Class Discussion
2. Scientific Method Worksheet

Lesson Two: (Day 2): The Hotel Walkway Disaster

A. Daily Objectives:

1. Lesson Content:
 - a. Counterintuitive thinking.
 - b. Galileo discovers the Earth rotates around the Sun.
 - c. Experiment with structural supports.
2. Concept Objective:
 - a. Counterintuitive thinking: students will be introduced to ways your mind can be easily fooled / ways to detect those illusions.
 - b. Students will participate in hands-on experimentation methods.

B. Materials:

1. The 10 Things All Future Mathematicians and Scientists Must Know...
2. Thread.
3. Play dough.
4. Heavy cardboard.
5. Stick or hanger for suspending walkways.
6. Weights (or pennies).

C. Vocabulary:

1. Counterintuitive
2. Catastrophic
3. Susceptibility
4. Architectural
5. Engineers

[Note: Explain vocabulary terms as they arise in the readings.]

D. Procedures:

1. In The 10 Things... Chapter 2, page 29, share the story of Galileo where he discovers that the earth travels around the sun.
2. On page 32, share the story of the Kansas City Hyatt Regency Hotel Disaster – 1981. Two thousand people gathered to watch a dance contest. Many people gathered on the suspended walkways over the lobby. The walkways collapsed because of an incorrect structural design.
3. Divide class into groups and have each group experiment with string, play dough and cardboard to make walkways (as in the Hyatt Regency Hotel). Have some groups construct one walkway with the changed design (structurally unstable) and others with the original design (structurally stable).
4. Add weights to walkways until they collapse.
5. Chart the results and discuss the outcomes of the experiments.
6. Use discussion questions at the end of Chapter 2, page 35. (Sample: Can you think of a way to have two 25 foot rods but still have the same strength as one 50 foot rod?)

E. Assessment:

1. Class Discussion.
2. Construction of walkways.

[Note: Advance preparation for next lesson - Petri Dishes]

Lesson Three (Day 3): Keep an Open Mind (Part 1)

A. Daily Objectives:

1. Lesson Content:
 - a. Disbelief of discoveries.
 - b. Elizabeth Kenny and Polio.
 - c. Dr. Semmelweis and Puerperal Fever.
2. Concept Objective:
 - a. Students will be introduced to situations where keeping an open mind can save lives and change the world.
 - b. Students will participate in Petri dish growth.

B. Materials:

1. The 10 Things All Future Mathematicians and Scientists Must Know...
2. Petri dishes
3. Nutrient agar growth medium
4. Cotton swabs
5. Incubator

C. Vocabulary:

1. Initially
2. Implications
3. Homesteaders

4. Desolate
5. Encountered
6. Alleviate
7. Infantile
8. Paralysis
9. Immobilizing
10. Theorized
11. Ambulatory
12. Ostracism
13. Puerperal fever
14. Medical practitioners
15. Autopsy
16. Chlorinated
17. Colleagues

[Note: Explain vocabulary terms as they arise in the readings.]

D. Procedures:

1. Share the opening of Chapter 5 in The 10 Things...., page 96. In 1878 the president of the French Academy of Science was presenting Thomas Edison's new invention copying the human voice, he was accused of trying to fool and trick the observers.
2. Share and discuss the story on page 99 about Elizabeth Kenny and Polio. Sister Kenny was a nurse who was working alone in the Australian Outback when she found a treatment for Polio patients. Optional discussion questions are at the end of this section on page 102. (Sample: Do you think that Sister Kenny would have tried hot compressions and motion therapy if she knew the standard treatment for Polio?)
3. Share and discuss the story on page 103 of Dr. Semmelweis and Puerperal Fever. In 1847 Dr. Semmelweis found a significant number of women who gave birth at his hospital and were healthy, then died several days later of Puerperal Fever. He adopted a hand washing mandate.
4. Discuss the questions at the end of the section on page 105. (Sample: Why do you think the other doctors rejected Dr. Semmelweis's theory concerning the cause of Puerperal Fever?)
5. Experiment – split class in small groups, and give each group a Petri dish and a few cotton swabs. Assign the students to certain spaces or objects or let them choose where they think bacteria may be growing. Use cotton swabs to transfer environmental bacteria to Petri dishes. Set Petri dishes in incubator to discuss at a following meeting.

E. Assessment:

1. Class Discussion.
2. Petri Dishes.

Lesson Four (Day 4): Keep an Open Mind (Part 2)

A. Daily Objectives:

1. Lesson Content:
 - a. Dr. Goldberger and Pellagra.
 - b. The shocking discovery about ulcers.
2. Concept Objective:

- a. Students will learn how keeping an open mind, can save lives, and change the world.
 - b. Students will participate in hands-on experimentation methods.
- B. Materials:

- 1. Clear glass containers.
- 2. Vinegar.
- 3. Baking soda.
- 4. Antacids.
- 5. Measuring device.
- 6. Vocabulary:
- 7. Pellagra
- 8. Attributed
- 9. Ulcers
- 10. Preposterous
- 11. Gastroenterology
- 12. Entrenched

[Note: Explain vocabulary terms as they arise in the readings.]

C. Procedures:

- 1. If Petri dishes have incubated long enough, show the students the results and discuss which places or objects were the ‘germiest.’
- 2. Share and discuss the story in Chapter 5, page 106 of The 10 Things..., about Dr. Goldenberger and Pellagra. Pellagra was a disease in the early 1900’s believed to be caused by microbes. It was contracted by over 100,000 Americans (mostly in orphanages, prisons, and asylums). Dr. Goldberger used the scientific method to determine that it was caused by a food deficiency.
- 3. Lead a discussion using the questions on page 108. (Sample: Most doctors thought the cause of pellagra was bacterial. How do you think they explained the fact that *employees* at prisons, orphanages, and insane asylums did not get pellagra?)
- 4. Share and discuss the story on page 109, the shocking discovery about ulcers. Until the early 1980’s doctors thought ulcers were caused by too much stress, eating spicy foods, and drinking acidic beverages. In 1983 two Australian doctors, Dr. Warren and Dr. Marshall, discovered a certain bacteria in the stomachs of people with ulcers.
- 5. Use the discussion questions on page 111. (Sample: Do you think that Dr. Marshall did the right thing when he purposely took H. pylori [the ulcer causing bacteria] to see if it would give him an ulcer?)
- 6. Either split the class in groups or do a class demonstration. Fill clear containers $\frac{1}{4}$ of the way full of vinegar. Add baking soda as desired. This can be an example of the acid in the stomach that aggravates ulcers. Now add antacids as needed to calm the upset stomach.
- 7. Discussion – talk about the results that come from being open minded as apposed to close minded.

D. Assessment:

- 1. Discussion.

Lesson Five (Day 5): Mistakes and Ethics

A. Daily Objectives:

- 1. Lesson Content:
 - a. The benefits of failure and frustration.

- b. The overloaded bridge.
 - c. The building that almost tipped over.
2. Concept Objective:
- a. Students will participate in a discussion of learning from mistakes and preventing catastrophes.
 - b. Students will learn of real-life situations where ethics played a major role.
 - c. Students will build models for structural integrity.

B. Materials:

- 1. Decks of playing cards.
- 2. Tape.

C. Vocabulary:

- 1. Suspension
- 2. Innovative
- 3. Distinguished
- 4. Integrity
- 5. Ethical

[Note: Explain vocabulary terms as they arise in the readings.]

D. Procedures:

- 1. Share the story in Chapter 4, page 81, of The 10 Things... about the importance of experiencing failure and frustration: a study of failure conducted by the University of California found that men and women in the work place dealt better with change and stress if they had experienced a lot of change and stress in childhood.
- 2. Share the story in Chapter 4, page 73, of The 10 Things... about the overloaded bridge: in 1987 the Golden Gate Bridge celebrated a 50th anniversary; the town had a celebration and the bridge was closed to traffic and almost ¼ of a million people met at the center of the bridge - their weight stressed the structure of the bridge.
- 3. Use the questions on page 74 to lead a discussion with the class: (Sample: If the bridge did collapse, would you place any blame on the people who built the bridge?)
- 4. Discuss the story in the opening to Chapter 9, page 180, of The 10 Things... detailing how American car manufacturers rushed to develop a small fuel-efficient car and found a serious design flaw; they decided it would cost more to fix the car than to pay the insurance claims. (If time allows, you can discuss the exploding gas tank section.)
- 5. Share the story in Chapter 9, page 192, The 10 Things... of the building that almost tipped over. William Le Messurier was an engineer who built a building around and over a small church for Citicorp. His plans were not followed correctly, and when he found out, he had the problem fixed before the building would fall. Discussion questions are on page 194. (Sample: Give some realistic examples of unethical responses to LeMessurier's situation?)
- 6. Split the class into small groups and have them use playing cards and tape to build a small building around and over an empty space or small item, designed to withstand wind. Using a table fan or hair dryer time how long the building is able to withstand a windstorm.
- 7. Chart the results.
- 8. Lead a discussion of the pro's and con's of the students' different designs.

E. Assessment:

1. Discussion.
2. Playing card buildings.

Lesson Six (Day 6) – Healthy Skepticism / Cause and Correlation (Part 1)

A. Daily Objectives:

1. Lesson Content:
 - a. Psychic predictions.
 - b. Herd immunity and vaccinations.
 - c. Cause and correlation.
2. Concept Objective:
 - a. Students will be introduced to stories that show a healthy skepticism in scientific matters.
 - b. Students will be introduced to the concept of ‘Cause and Correlation.’
 - c. Students will be introduced to conducting research and debating.

B. Materials:

1. Debate Worksheet (Insert C)
2. Access to the library.
3. Access to research materials such as the internet.

C. Key Vocabulary:

1. Skepticism
2. Psychic
3. Epidemics
4. Philosophical
5. Correlation
6. Susceptible
7. Prevaricated

[Note: Explain vocabulary terms as they arise in the readings.]

D. Procedures:

1. In The 10 Things... Chapter 6, page 116, share the opening story of the man and the psychic.
2. In The 10 Things... Chapter 6, page 127, discuss the concept of herd immunity and vaccinations. Because of the success of the vaccination program in the US, the effects of childhood viral diseases are fading. As memories fade, a growing number of people are not vaccinating their children. Use discussion questions on page 129. (Sample: When scientists are consulted about whether children should be vaccinated, they usually say that “we must look at the big picture.” What do they mean by saying that?)
3. Share the opening section of Chapter 8, page 159, in The 10 Things... about knowing the difference between cause and correlation. Research has led to a stunning discovery: people die in beds, so I will no longer be sleeping in a bed. (show cartoon of researcher)
4. Relate the story in The 10 Things... Chapter 8, page 174 about how tobacco companies tried to confuse cause and correlation: the tobacco companies claimed that just because there was a correlation between smoking and lung cancer it didn’t mean that smoking caused lung cancer. Discussion questions are available on page 176. (Sample: What does it mean to prevaricate?)
5. Research and debate – split class into 4 groups, assign one group to debate for tobacco companies and one group against them. Assign

another group to debate for vaccination companies, and the last group to debate against them. Give the students the Debate Worksheet to prepare for the next meeting.

- E. Assessment:
 - 1. Discussion
 - 2. Debate performances (next time)

Lesson Seven (Day 7) – Healthy Skepticism / Cause and Correlation (Part 2)

- A. Daily Objectives:
 - 1. Lesson Content:
 - a. Class will meet and debate for or against tobacco companies, and vaccinations.
 - 2. Concept Objectives:
 - a. Students will participate in research and debate for the topics of tobacco and immunizations.
- B. Materials:
 - 1. Chairs set up in audience format.
 - 2. Defined debaters section with podium (if possible).
 - 3. Timer.
- C. Vocabulary:
 - 1. Skepticism
 - 2. Psychic
 - 3. Epidemics
 - 4. Philosophical
 - 5. Correlation
 - 6. Susceptible
 - 7. Prevaricated

[Note: Explain vocabulary terms as they arise in the readings.]
- D. Procedures:
 - 1. Briefly review the procedures listed on the Debate Worksheet.
 - 2. The first debate will be for and against tobacco companies. Follow the procedures and time-frame listed in the Debate Worksheet.
 - 3. The debate over vaccinations will follow the same format as the first.
 - 4. End with a discussion of the outcomes, what the students learned, what they already knew, and what may have surprised them.
- E. Assessment:
 - 1. Debate Worksheets.
 - 2. Debate behavior.

Lesson Eight (Day 8) – Innovative Volume

- A. Daily Objectives:
 - 1. Lesson Content:
 - a. Innovative methods.
 - b. Measuring volume.
 - 2. Concept Objectives:
 - a. Students will observe practical applications of innovative thinking.
 - b. Students will be able to calculate volume.
- B. Materials:
 - 1. Large clear container.

2. Water.
3. Oddly shaped items to measure (rocks, small toys, leaves, marbles, symbolic crown...).
4. Rectangular block (preferably not buoyant).

C. Vocabulary:

1. Pondered
2. Passionate

[Note: Explain vocabulary terms as they arise in the readings.]

D. Procedures:

1. Using Chapter Nine in Challenge Math For the Elementary and Middle School Student, Page 129, discuss the formulas for finding the volume of a rectangle, cylinder, or sphere.
2. Choose some volume problems from pages 133-137 to practice finding volumes. (Sample: What is the volume of the water in a full 50' garden hose that has a 2 inch inside diameter?)
3. Share the story in Challenge Math For the Elementary and Middle School Student, Chapter Nine, page 128, about Archimedes, the Greek mathematician who is famous for using mathematics to determine whether a king's crown consisted of the same amount of gold as was given to the goldsmith.
4. Using a large clear container about half full of water, measure the volume of objects that are oddly shaped, by measuring the volume of the displaced water. (Have markings on the side of the container depicting cubic inches or cubic centimeters.)
5. Verify the volume of a rectangular block by calculating its volume using its measurements and the formula, $V = L \times W \times H$, and then submerge it in water and measure its displacement.
6. Students can use the remaining time to complete their KWL papers that they started at the beginning of the unit.

E. Assessment:

1. Experiment participation
2. KWL paper.

VI. BIBLIOGRAPHY

The 10 things All Future Mathematicians and Scientists Must Know (But Are Rarely Taught), Edward Zaccaro, Hickory Grove Press, 2003

Challenge Math – For the Elementary and Middle School Student, Edward Zaccaro, Hickory Grove Press, 2005

Program Instruction

Methods

Excelsior Academy will utilize five methods of assessment to evaluate the program's effectiveness at teaching the Utah State Core Standards: State Mandated Assessments, Traditional Grading/Formative Assessments, Placement Tests for Mathematics and Language Arts/Reading, and Student Led Conferences.

The teachers will have three Professional Development Days throughout the year where they receive training. They will also be provided with seven Quality Teaching Block days. Additional training may be provided at the teachers' request. Teachers will receive Core training through the Utah State Office of Education. Each teacher will complete required Continuing Education requirements to maintain his or her teaching license. The teachers will have prep time every week on Excelsior's short day where they may collaborate on lesson plans.

Excelsior will present a ***broad, classical education*** by basing its curriculum on the Core Knowledge Sequence. The Core Knowledge Sequence has been aligned with the Utah State Core standards and meets or exceeds all of the standards put forth by the Utah State Office of Education. Each teacher will submit his or her lesson plans to the School Director for review at the beginning of the year to ensure complete knowledge and coverage of the Core standards and objectives.

Outside services that monitor a student's progress and response to intervention, such as AIMSweb, will provide teachers, administrators and parents with continuing performance evaluations. Student Portfolios will be used to monitor a student's learning. Curriculum specific placement tests for Math and Language Arts/Reading will be used to determine the students' level in each subject.

The School Director will closely monitor the teachers on an ongoing basis throughout the school year. The Director will observe classes and meet with the teacher after the observation session to provide feedback on where they meet or exceed their personal teaching goals, and to inform them of any areas that need improvement.

Teacher Monitoring and Accountability

All teachers will be formally reviewed twice each school year. The School Director will create an Entry Years Enhancement evaluation (EYE) rubric based on Interstate New Teacher Assessment & Support Consortium (INTASC) principles following State Rule R277-522, Excelsior's Effectiveness Goals and according to State standards on educator evaluation (R277-515). All teachers will be formally

observed by the School Director, and will receive at least one day's notice before the observation. The Director will also observe classes occasionally without notice. After the review with the Director there will be a perpetual development plan agreed upon by the teacher and the School Director which is designed to assist the teacher in continuing to strive for excellence in every aspect of meeting the mission and objectives of Excelsior Academy. For teachers who require remediation, an improvement plan will be developed and/or they may be subject to disciplinary procedures according to the procedures in the Employee Evaluation section.

At the beginning of the school year, each teacher will be required to submit a rough outline of his or her lesson plans for the year to the Director. Additionally, the Director may require a quarterly lesson plan overview from teachers at his or her discretion.

Tracking and Utilizing Student Performance Data

Excelsior Academy will use five methods of assessment to track the program's effectiveness at teaching the Utah State Core Standards.

1. State Mandated Assessments:

- The Iowa tests of Basic Skills will be implemented according to State Standards and will be included in Student Portfolios.
- The Core Criterion-Referenced Tests (CRT) will be implemented according to State standards and will be used for both grade placement and level placement within grades.
- The Direct Writing Assessments (DWA) will be used, as well as any other State mandated assessments on an as-needed basis, such as Utah Academic Proficiency Assessment (UALPA) and Utah Alternative Assessment (UAA).

2. Traditional Grading: Students' scores will be kept up to date and accessible to parents, aids/tutors, students and school Director(s).

3. Formative Assessments: Outside testing services that monitor each student's progress and response to intervention, such as AIMSweb. This provides teachers, administrators and parents with current performance data as often as necessary. Student Portfolios will also be used as tools for learning; students will be able to showcase their work and reference previously covered materials. Parents will know what is being studied and observe how well their child understands the subjects.

4. Placement Tests: Curriculum specific placement tests will be used for initial placement in Math and Language Arts/Reading and for adjustments in cases where students and or teachers feel that the student is not at the proper level.

5. Student Led Conferences: Students will present their Student Portfolios as a formative assessment for parents and teachers to evaluate the student's performance, report on their progress, and follow up on personal goals in regular *student led* parent/teacher conferences. These will take place quarterly. Teachers will be available by email and/or telephone to answer any additional questions that parents may have that aren't covered during the Student Led Conferences.

Excelsior will utilize a Tutor Intervention Program (TIP) which is designed to detect and aid students before they fall behind in Math and Language Arts/Reading. Each classroom will have a teacher and an aide or parent tutor volunteer during Math and Language Arts/Reading instruction time. If a student struggles with a concept or is consistently scoring low on tests in a certain area, that student will meet with an aide for individual/small group instruction aimed at reinforcing an idea or approaching it with a different teaching method that is more conducive to learning for that student. This would take place during the usual instruction time for the classroom. If this happens frequently the student's progress will be reviewed and if needed a referral will be made for the student to the Special Education Department following Child Find procedures. Excelsior Academy will train teachers and aides in Child Find to assist in the identification of students who may need Special Education Services.

Likewise, if students need a more challenging curriculum because they are too advanced for a subject, this program will allow them to move up a level or grade. By using TIP, Excelsior will be able to constantly monitor the students and make adjustments for a student's appropriate placement.

Calendar and Master Schedule



EXCELSIOR
ACADEMY

ENGAGE › ENCOURAGE › EXCEL

Excelsior Academy Calendar: 2009-2010

July 2009

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

August 2009

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

September 2009

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
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27	28	29	30			

October 2009

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18	19	20	21	22	23	24
25	26	27	28	29	30	31

November 2009

Su	Mo	Tu	We	Th	Fr	Sa
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8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

December 2009

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

January 2010

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

February 2010

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

March 2010

Su	Mo	Tu	We	Th	Fr	Sa
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7	8	9	10	11	12	13
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21	22	23	24	25	26	27
28	29	30	31			

April 2010


Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	


May 2010


Su	Mo	Tu	We	Th	Fr	Sa
						1
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16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					


June 2010


Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

 School Holidays

 Parent Teacher Conferences

 Opening/Closing Date for School

 School Day (8:15 – 3:30)

 Staff Development (No School)

 Term Ends

 ½ Day (8:15-1:10) - Professional Development – each Friday

 Testing Days

Master Schedule

Professional Development Days	5-7-Aug
Quality Teaching Block- No School	17-18-Aug
First Day of School	19-Aug
Kindergarten Assesment	19-36-Aug
Back to School Night	26-Aug
Kindergarten First Day	27-Aug
Labor Day – No School	7-Sep
IBST Testing	21-25-Sep
Quality Teaching Block - No School	9-Oct
Student-Led Parent/Teacher Conference	14-Oct
First Term Ends (46 Days)	23-Oct
Fall Break (UEA Convention)	29-30 Oct
Thanksgiving Break	25-27 Nov
Winter Break	23 Dec - 1 Jan
Student-Led Parent/Teacher Conference	6-Jan
Second Term Ends (46 Days)	14-Jan
Quality Teaching Block - No School	15-Jan
Martin Luther King Holiday (No School)	18-Jan
Quality Teaching Block	12-Feb
Presidents Day (No School)	15-Feb
DWA Testing	22-26 Feb
Student-Led Parent/Teacher Conference	10-Mar
Quality Teaching Block	12-Mar
Third Term Ends (41 Days)	19-Mar
Spring Break (No School)	29 Mar - 2 Apr
Core CRT Testing	19-23-Apr
Quality Teaching Block	30-Apr
Fourth Term Ends (44 Days)	28-May
Last Day of School	28-May

Full Days 949 hrs. 0 min.
 (6 hrs. 30 min. x **146** days)
 Half Days 129 hrs. 10 min.
 (4 hrs. 10 min. x **31** days)
 Total 1078 hrs. 10 min.
 P/T Conference (**3** days) 16 hrs. 30 min.
 Total **1094 hrs. 40 min.**

School holidays
Grading Periods/Parent Teacher Conferences
Opening and Closing Date for School
Staff Development
Term Ends
Testing Windows

Board Meetings: Board meetings will be held once a month - adjusted as needed.
 Student/Parent/Teacher Conferences: Held a few days before the end of each term.
 Teachers will also be available before and after school by appointment.
 Half Days: Friday will be a half day

Bell Schedule

Full Day Schedule 1st - 8th

	8:45	9:10	9:45	10:10	10:45	11:20	11:45	12:20	12:45	1:30	1:45	2:00	2:15	2:30	2:45	3:00	3:15	3:30																		
1st	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>Language Arts</p> <p>Language Arts</p> </div> <div style="width: 48%; text-align: right;"> <p>Club Time</p> </div> </div>																																			
2nd																			Literature/Enrichment	PE/Art/Music	History/Geo.	PE/Art/Music	History/Geo.	Lunch	Science	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math
3rd																			Literature/Enrichment	PE/Art/Music	History/Geo.	PE/Art/Music	History/Geo.	Lunch	Science	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math
4th																			Literature/Enrichment	PE/Art/Music	History/Geo.	PE/Art/Music	History/Geo.	Lunch	Science	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math
5th																			Literature/Enrichment	PE/Art/Music	History/Geo.	PE/Art/Music	History/Geo.	Lunch	Science	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math
6th																			Literature/Enrichment	PE/Art/Music	History/Geo.	PE/Art/Music	History/Geo.	Lunch	Science	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math
7th																			Literature/Enrichment	PE/Art/Music	History/Geo.	PE/Art/Music	History/Geo.	Lunch	Science	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math
8th																			Literature/Enrichment	PE/Art/Music	History/Geo.	PE/Art/Music	History/Geo.	Lunch	Science	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math	History/Geo.	Math

1/2 Day Schedule 1st - 8th

	8:45	9:10	9:45	10:10	10:45	11:20	11:45	12:20	12:45	1:30	1:45	2:00	2:15	2:30	2:45	3:00	3:15	3:30																		
1st	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>Language Arts</p> <p>Language Arts</p> </div> <div style="width: 48%; text-align: right;"> <p>History/Geo.*</p> <p>History/Geo.*</p> <p>History/Geo.*</p> </div> </div>																																			
2nd																			Literature/Enrichment	PE/Art/Music	Math	PE/Art/Music	Math	Lunch	Science	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*
3rd																			Literature/Enrichment	PE/Art/Music	Math	PE/Art/Music	Math	Lunch	Science	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*
4th																			Literature/Enrichment	PE/Art/Music	Math	PE/Art/Music	Math	Lunch	Science	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*
5th																			Literature/Enrichment	PE/Art/Music	Math	PE/Art/Music	Math	Lunch	Science	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*
6th																			Literature/Enrichment	PE/Art/Music	Math	PE/Art/Music	Math	Lunch	Science	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*
7th																			Literature/Enrichment	PE/Art/Music	Math	PE/Art/Music	Math	Lunch	Science	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*
8th																			Literature/Enrichment	PE/Art/Music	Math	PE/Art/Music	Math	Lunch	Science	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*	Math	History/Geo.*

- Start-up Time
- Language Arts/Reading
- Literature/Enrichment*
- *Keyboarding, Computers, Foreign Language...
- PE/Health/Dance/Art/Music
- History/Geography
- Lunch
- Recess
- Science
- Math
- Organized Instructional Recess
- Club Time

*Can be switched with Science.

Full Day Schedule - Kindergarten

	8:45	9:10	9:45	10:10	10:45	11:20	11:45	12:20	12:45	1:30	1:45	2:00	2:15	2:30	2:45	3:00	3:15	3:30
A.M. Session	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>Language Arts</p> </div> <div style="width: 48%; text-align: right;"> <p>Recess</p> <p>Science</p> <p>Math</p> </div> </div>																	
P.M. Session																		

1/2 Day Schedule - Kindergarten

	8:45	9:10	9:45	10:10	10:45	11:20	11:45	12:20	12:45	1:30	1:45	2:00	2:15	2:30	2:45	3:00	3:15	3:30
A.M. Session	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>Language Arts</p> </div> <div style="width: 48%; text-align: right;"> <p>Recess</p> <p>Science</p> <p>Math</p> </div> </div>																	
P.M. Session																		

Special Education

Excelsior Academy acknowledges the fact that *all* students deserve the best education. Excelsior Academy's approach will help to keep any Special Education students integrated in the regular classroom as much as possible in accordance with the IDEA and Free Appropriate Public Education (FAPE) statutes in the Least Restrictive Environment (LRE).

Excelsior Academy's Director/Assistant Director along with the Special Education staff will have a strong knowledge of laws pertaining to Special Education, specifically Individuals with Disabilities Education Act (IDEA) and the Utah Special Education rules through attendance at conferences and continuing education classes. The school will implement and follow all laws required exceeding their criteria when possible.

Excelsior Academy's school building will follow all requirements as outlined in the Americans with Disabilities Act (ADA). The entire school will be accessible.

Child Find

Search Out and Find

Excelsior Academy shall ensure that all students with disabilities residing in the community, who are in need of special education and related services, are identified, located, and evaluated.

Excelsior's staff will be educated to recognize signs that a student might have a disability. They will review Child Find procedures and be trained annually by the Special Education Department. In order to identify additional special education students, Excelsior Academy will also use community outreach which may consist of, but not be limited to, informing healthcare professionals, public announcements, newspapers, posters at the school, grapevine, and church organizations.

Referral

Parents and teachers may refer students to be assessed by the Special Education department. . If a referral is requested by a parent the Teacher will review the referral, gather data and submit the information to the Special Education Department. The Special Education teacher will be available to observe students in the regular classroom. If the child is found to be in need of assessment and testing, consent, as outlined in Child Find requirements, will be required, and parents/guardians and teachers will be notified of the outcome. If deemed necessary, an Individual Education Plan (IEP) will be developed with the IEP team within the 30 day period.

All student files for the Special Education Department will be kept locked and under the supervision of the School Director/Assistant Director, and Special Education Department in accordance with confidentiality rules.

Procedures will be implemented to ensure privacy of sensitive information. Excelsior Academy will ensure that identification of Special Education students includes the notification of, and ongoing communication with, parents and their consent, as outlined in Child Find and with IDEA, and Utah Special Education Rules. Excelsior Academy will be in keeping with all the rules in accordance with the Family Educational Rights and Privacy Act (FERPA). Parents and eligible students have the right to inspect and review all education records of their child. Excelsior Academy will make all records available to parents as well as other qualified persons or agencies with parent's written permission.

Individual Education Plans

The Special Education teacher(s) will be responsible for Individual Education Plans (IEP). They will also be responsible for testing or coordinating assessments that may need to be done by other qualified specialists, such as psychologist, speech and language specialists or any other possible specialists. Services will be provided to all students who qualify for Special Education, no matter the severity. Excelsior Academy will plan ahead to have contracts and services such as physical, occupational and speech therapies, psychologists and other services as outlined in a student's IEP. Aides and other resources will be available for such services according to specific IEP's. Planning ahead and setting up these procedures for the future will help Excelsior to meet IEP needs in a timely manner.

The Special Education Teacher will assemble a team that determines the specific services for each IEP. It may consist of, but is not limited to: parents/guardians of the child, the Special Education teacher, the Director, the school teacher, specialists (i.e. speech, occupational, and physical therapists, psychologists, or other specialists), previous teachers, and the student if appropriate. The Special Education teacher with the help of the IEP team will determine each IEP and see that all the needs of each student are met. A required member of the IEP team is not available to meet at a scheduled time, they may only be excused from the meeting with parents' written consent as well as the consent of either the Director/Assistant Director or the Special Education teacher.

Excelsior Academy will hire the appropriate amount of Special Education teachers for the school size taking into consideration the average of 10% of the student population qualifying for Special Education. Class sizes will be kept appropriate and Excelsior Academy will employ aides to ensure the student/teacher ratio is low. By nature of the design the leveled learning environment can ensure that students who require special education services can be accommodated as soon as the need

arises and Excelsior Academy will continually evaluate the effectiveness of the Department and be prepared to expand the program as necessary.

Transfer Students

The special education department will comply with all Utah State Office of Education rules as well as IDEA when involving a transfer student. Excelsior Academy will transfer records for a student who will be leaving the school in a timely manner. When accepting a transfer student his or her current IEP or a temporary IEP will be in place until it can be adopted or a new one set in place, within a 30 day period. If special education records or IEP are not available, an evaluation will be planned with parents consent within a timely manner, expediting the usual 60 day period. Excelsior Academy will provide FAPE for students.

Unsupervised time with Students

Background checks on all of Excelsior Academy's volunteers are very important to the safety of the staff and students. Background checks will be required from all volunteers spending unsupervised time with students processed at their own expense. Waivers may be available to pay for a low-income household background check and will be done on a case by case basis. Excelsior's policy will require that volunteers not be alone with less than 2 children.

All staff employed at the school will be required to be fingerprinted and have a background check performed at the expense of the school.

Excelsior Academy will keep running files on every employee and volunteer who spends unsupervised time with students at the school. All employees and volunteers who will be fingerprinted and have background checks will also be required to read and sign the Excelsior Academy Code of Conduct, and will be reviewed regularly.

Section 12

Admission and Suspension/Expulsion Procedures



EXCELSIOR
ACADEMY
ENGAGE › ENCOURAGE › EXCEL

Admission

Excelsior Academy will be an open enrollment public charter school which will focus on providing a solid foundation of classical knowledge to prepare the students for future learning. The open enrollment period will begin September 1, 2008, and end February 20, 2009. Excelsior Academy will not discriminate on the basis of race, color, national origin, religion, sex, age or disability in compliance with IDEA 2004 and Civil Rights protections. Admission policies shall be administered in compliance with all applicable local, state, and federal laws and regulations.

Completed applications must be received by mail or from the school's website no later than the third Friday in February (February 20, 2009). Written notification will be given to the student's parent or legal guardian to notify the applicant of acceptance or rejection to Excelsior Academy by March 31, 2009. Written acceptance of the offer by the student's parent or legal guardian will be due by April 30, 2009.

In the event Excelsior Academy receives more applications than it has enrollment capacity, the school will hold a lottery. Enrollment priority will first be granted to the children of founding members and then to siblings of current students followed by children of Teachers currently employed at Excelsior Academy. Excelsior will hold a random drawing that will begin with eighth grade applicants. It will then proceed down through kindergarten, giving preference to the first drawn names and then to the siblings of the first drawn.

The children of founding members enrolled at the school shall not exceed 15% of the total population of the school.

The lottery will also determine the waiting list position for all other applicants at specified grade levels. Applications received after a scheduled lottery drawing will be held and included in the next lottery drawing.

Students enrolled for the current year will be given preference for the following academic year. Each year siblings of currently enrolled students will be given preference as space allows.

Suspension Procedures

All students have the right to learn in a safe environment. At Excelsior Academy there will be a shared responsibility between students, parents, and teachers in providing a productive learning environment. Discipline and dismissal procedures shall be followed without regard to race, color, religion,

sex, national or ethnic origin. Suspension and expulsion will be handled on a case by case basis for students with special needs (those with an IEP) following all regulations in IDEA 2004 in conjunction with the students IEP.

Student handbooks will be given to each student outlining what acceptable behaviors will be at Excelsior Academy. Students and their parents will enter into a contract to support the administration and abide by these rules and will be held accountable to fulfill their contract.

The School Director in cooperation with the Teacher is responsible for enforcing school rules, including disciplinary action. The Director may initiate in or out-of-school suspension for up to ten school days for serious causes, including, but not limited to the following: defiance of authority, harassment, disruptive behavior, fighting, arguing, bullying, vandalism, threats or intimidation, truancy, habitual tardiness, destruction of school or personal property, stealing, forgery of parent's signature, plagiarism, cheating on exams or assignments, leaving campus/clubs without permission, and verbal or physical abuse.

A police referral will be made when a student has committed a crime or violated local, state, or federal law. The parent/legal guardian shall be held financially and legally liable for any and all damages caused by his/her student.

Students receiving in or out of school suspension will be excluded from all extra curricular activities and/or work release time for no less than one week. In order to reinstate student privileges in the case of suspension, the student will be required to write a letter apologizing for the behavior and detailing any corrective action the student will take to eliminate the disruptive behavior(s) and effect restitution. The letter must be signed by both the student and parent or legal guardian and must be presented to the Director personally by the student with the parent or legal guardian.

The decision to initiate short term suspension (10 days or less), whether in or out of school will be at the discretion of the school Director. In the case of short term suspension, the Director will provide the student with the reason(s) for the suspension and the student will be given an informal opportunity to respond to the charges prior to the suspension. The parent/legal guardian will be notified by phone and in writing of any actions taken. For cases involving out-of-school suspension, in the event that the school is unable to contact the parent/legal guardian, the student will be held in suspension at the school until the end of the day. The parent/legal guardian shall be held liable for any and all damages financially and legally caused by his/her student.

Expulsion Procedures

The school administration may immediately remove and restrict from campus any student that displays serious and/or continued disregard for school rules and regulations, until due process can occur. Serious and/or continued disregard for school rules and regulations may include, but is not limited to the following:

- defiance of authority
- verbal abuse of adults or students
- disruptive or disorderly behavior
- violent or threatening behavior
- bullying
- fighting
- arguing
- intoxication
- destruction of school or personal property
- truancy
- persistent absenteeism not due to certifiable medical illness or disability
- persistent tardiness
- possession of firearms or other dangerous weapons
- possession of controlled substances and/or pornography

The parent/legal guardian shall be held liable for all damages caused by his/her student. A police referral will be made when a student has committed a crime or violated local, state, or federal law.

Due process shall occur in the following manner:

- The School Director will recommend the expulsion of a student to the Board of Directors.
- The parent/legal guardian of the student will be notified.
- A hearing shall be held after at least five working days notice, and must include the student, School Director, parent/legal guardian and a representative from the Board of Directors, unless the student and/or legal guardian refuse to attend.
- The parent/legal guardian may choose for the hearing to take place in either an open public meeting or a closed executive meeting. Should the parent/legal guardian refuse to select a venue, a venue shall be chosen by the Board of Directors.
- A recommendation for or against expulsion shall be made to the entire Excelsior Academy Board of Directors by the School Director after the expulsion hearing. A recommendation for expulsion must be ratified by a Board vote.

When the expulsion/suspension has expired, after the maximum time period permitted by law (which is currently the current semester, plus one additional semester for all violations except weapons violations which carry a federally imposed, mandatory one calendar year suspension) the student or his/her parent/legal guardian may reapply for admission.

The Board may deny admission to a student on the basis of having been expelled from Excelsior Academy or from any other school during the preceding 12 months.

Mandatory Suspension and Expulsion

For the following offenses and until due process can occur, the school administration may immediately remove and restrict from campus any student who:

- Commits an act of assault
- Carries, brings, uses, or possesses a deadly weapon or look-alike weapon without authorization. A deadly weapon includes, but is not limited to, a firearm, loaded or unloaded, knife, bludgeon, or any other weapon or instrument which in the manner it is used or intended to be used, is capable of causing death or serious bodily injury.
- Participates in the sale, exchange, distribution, or gift of drugs or controlled substances, as defined by state law, including anabolic steroids and prescription drugs.
- Commits an act of robbery.
- Participates in the use or possession of tobacco, drugs, or alcohol.

Section 13

Procedures to Review Complaints



Procedures to Review Complaints

Excelsior Academy believes that students and parents should be entitled to have access to effective systems for handling any complaints that might arise during the course of their studies. As part of our mission, this will ensure the highest possible academic and service standards, and assist Excelsior's students on their path of life-long learning.

- **Recommendations-** Suggestions for areas of improvement are always encouraged and welcomed by sending an email or letter to the Director.
- **Responsibility-** Most difficulties can be resolved at an early stage by talking informally with those most concerned with the issue at the earliest opportunity. If there is a conflict, it is encouraged that parties involved make efforts to first resolve their problems individually at this level.
- **Resolution 1-** If an individual is not satisfied with the outcome of the situation, a formal complaint may be made by contacting the Director. The Director will give guidance at his or her discretion to solve the issue.
- **Resolution 2-** Unresolved concerns will then move on to the Board of Directors where they will be formally reviewed in a timely manner. Contact may be made in writing or person, after which the Board will review the complaint during the next board meeting. The Excelsior Academy Board of Directors will provide a prompt resolution for the complaint at one of the next two scheduled board meetings.
- **Mediation-** In the unusual instance that things cannot be resolved, the parties will move on to meet with a mediator mutually agreed upon or seek legal guidance if necessary.

Students served under Section 504 or Part B of the Individuals with Disabilities Education Act (IDEA) will work under the guidance of the Special Education teacher to ensure that situations are handled properly in accordance with state and federal law. If parents choose to file a formal complaint in writing, the Director and/or Board of Directors will conduct an internal investigation according to the procedures outlined in the Utah State Board of Education's Special Education Rules. The complaint shall be resolved within 30 days, expecting unforeseen circumstances which can cause an extension of up to 10 additional days. Written copies of the resolution will be sent to all parties involved, the State Director of Special Education, and will include instruction for appealing the decision to the Utah State Office of Education (USOE).

Section 14

Opportunities for Parental Involvement



Opportunities for Parent Involvement

Excelsior Academy believes that parent participation is a key factor to its success. The academy respects parents who want to be involved and feels that it is important for parents to participate in their children's education. Parent participation helps make strong communities and raises confident children. Therefore, the academy will invite all parents and qualified family members to participate in the many volunteer opportunities that will become available throughout the school year. Parent participation is paramount to the success of Excelsior Academy in achieving the goals of the school.

Qualified family members are responsible adults such as parents, legal guardian, grandparents, or in some instances, adult siblings and aunts or uncles.

Parent Committee/Volunteer opportunities

Opportunities for parental involvement would be handled under the direction of the Parent-Teacher Organization (PTO). Upon enrollment each family will be assigned to a Parent Committee. The parents will be given authority to accomplish important functions related to the mission of the school.

Volunteer opportunities include, but are not limited to:

- Parent Teacher Organization
- Tutor Intervention Program (TIP)
- Volunteering in the classroom
- Community Service
- Lunchroom
- Playground
- Records, providing extra help to the paid school staff such as in the office
- Newsletter
- Website
- Special Needs
- Fine Arts
- Special Events
- Fund raisers
- Field trips

Excelsior Academy will post volunteer ideas on their website, in the classroom, and in newsletters that will be made available. Parent Advisory Board members will also be available for contact.

At the time of registration parents will be asked to fill out a parent profile, to be kept on file. This will address such things as: education, talents, and skills that each parent may possess. With parent profiles Excelsior can offer opportunities to volunteer where the parents would be most experienced and needed. Training will be provided for parents as needed, for example, with the TIP program.

Background checks on all of Excelsior Academy's volunteers are very important to the safety of the staff and students. Background checks will be required from all volunteers spending unsupervised time with students, processed at their own expense. Waivers may be available to pay for a low-income household background check and will be done on a case by case basis. Excelsior Academy will keep running files on every employee or volunteer who spends unsupervised time with students at the school. All employees and volunteers who will be fingerprinted and have background checks will also be required to read and sign the Excelsior Academy Code of Conduct, and will be reviewed regularly.

Parent influence of the school

Excelsior Academy encourages parents to be active participants in the management of the school. A minimum of 25% of the Board of Trustees will be parents of students at the school. The Parent Teacher Organization (PTO) President will be voted in by the parents, he/she will also serve as a member of the Board of Trustees. Excelsior Academy will have a Parent Advisory Board under the direction of the PTO president. Excelsior Academy will advertise monthly Trustee meeting times to parents. Parents will have the opportunity to attend and make public comment if they desire. This will give parents opportunity to influence the management of the school.

Parents will have the opportunity to voice their opinions and concerns to the Director or at open board meetings. Parents will be encouraged to provide input during open board meetings.

The Parent Advisory Board will be made up of parents representing each grade level at Excelsior Academy as well as the PTO President. The parents of current students will elect members to the Advisory Board. The Parent Advisory Board will be made up of one parent from each grade, each being voted into the position by parents and teachers.

Section 15

Educator Qualifications



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Teacher qualifications in compliance with Excelsior goals

Teachers will be under the same obligations as per Utah State code R277-520-3. Excelsior Academy may employ early childhood, elementary and possibly secondary education teachers as necessary.

Each teacher will be required to hold a level 1, 2 or 3 licenses with their specific area of concentration. Excelsior Academy may require subject-specific teachers for grades 6 through 8. These teachers may hold a secondary license area of concentration including endorsements for the specific teaching assignment(s) or an elementary license area of concentration with the appropriate subject/content endorsement(s).

Excelsior will hire qualified teachers who will be willing to support the plan for leveled and accelerated learning. Excelsior understands that each student is an individual and therefore has individual learning styles. In order to provide an excellent education for each student, and to fulfill the mission of helping children learn at their level, Excelsior incorporates different elements of instruction. These methods may include visual, auditory, and hands-on learning particularly in the tiered Tutor Intervention Program. Since teachers have a large influence on a student's learning Excelsior places on-going training and continuing education as a high priority for its teachers.

License Requirements

Excelsior academy will require Teachers to have the appropriate licenses and endorsements in accordance with the guidelines set forth by the State of Utah (R277-520).

Highly qualified teachers

Excelsior Academy will hire highly qualified teachers according to the No Child Left Behind Act and following all requirements as outlined in Utah State Law R277-510. A highly qualified teacher will:

1. Possess a bachelor's degree; and
2. an educator license with an early childhood area of concentration; and
3. at least one of the following:
 - a. a passing score at the level of designated by the USOE on a Board approved subject area test; or
 - b. a Level 2 license with documentation of satisfaction of the veteran teacher requirements for the assignment as described in R277-510-8.

NCLB requirements do not apply to any pre-K assignment.

Paraprofessionals

Excelsior Academy may hire paraprofessionals, or an individual who works under the supervision of a teacher or other licensed/certificated professional who has identified responsibilities in the public school classroom. and will follow the outline of requirements noted in Utah State Code R277-524. A paraprofessional may:

- Provide individual or small group assistance or tutoring to students under the direct supervision of a licensed teacher during times when students would not otherwise be receiving instruction from a teacher.
- Assist with classroom organization and management, such as organizing instructional or other materials;
- Provide assistance in computer laboratories;
- Conduct parental involvement activities;
- Provide support in the library or media centers;
- Act as translators
- Provide supervision for students in non-instructional settings.

Excelsior Academy recognizes the need to have other instructional/classroom aides or substitute teachers. They will be required to have a minimum of a high school diploma, and display knowledge and capabilities for teaching in a classroom setting. However if Excelsior Academy uses Title 1 funding for paraprofessionals the Academy will follow all guidelines following R 277-524-4.

Unsupervised time with Students

Background checks on all of Excelsior Academy's volunteers are very important to the safety of the staff and students. Background checks will be required from all volunteers spending unsupervised time with students processed at their own expense. Waivers may be available to pay for a low-income household background check and will be done on a case by case basis. Excelsior's policy will require that volunteers not be alone with less than two children at any given time.

All staff employed at the school will be required to be fingerprinted and have a background check performed at the expense of the school.

Excelsior Academy will keep running files on every employee or volunteer who spends unsupervised time with students at the school. All employees and volunteers who will be fingerprinted and have background checks will also be required to read and sign the Excelsior Academy Code of Conduct, and will be reviewed regularly.

Section 16

Administrative Services



Administrative Services

The Facility

The Facility includes all the building and business requirements needed to be a successful school. The building will be maintained and provisions put in place for repair and upkeep. The building will be safe, clean and orderly. Equipment and inventory will be readily available and in good working order. Business reports, audits and accounting and budgeting will be done in a professional and timely manner. Employment issues including: payroll, benefits, terminations, etc. will be handled appropriately. School purchasing will be strictly held to reserved budgetary limits. A comprehensive legal plan including insurance and liability will cover future conflicts and employment issues.

Service Provided	Responsible Party
Maintenance	Director, Contractor
Janitorial	Director, Contractor, Volunteer
Equipment/Inventory	Director, Assistant Director
Reports/Audits/Budget/Accounting	Charter Business Services
Employment Records	Secretary/Charter Business Services
Purchases	Director, Assistant Director
Legal Issues	Attorney

Administrators

Administrators include the School Board of Trustees, the Director, the Assistant Director, Secretary and all others who support the administrative role. Administrators set the tone for the entire school. Administrators are also the face of the school to the community. Each will be selected with care. On-going professional education and training will be required for all administrators.

Service Provided	Responsible Party
Administrator Selection	
Excelsior Board of Trustees	Member Elections

Director/Assistant Director	Excelsior Board of Trustees
Secretary	Director
Others	Director
Professional Education/Training	Director, Assistant Director
Community Relations	Excelsior Board of Trustees/Director/Parent Teacher Organization (PTO)
Teacher Recruitment and Hiring	Director

Director Qualifications

The Director for Excelsior Academy will be passionate about the goals and mission of the Academy with a desire to work with and encourage the student body. Excelsior Academy will look for the following qualities in a Director:

Continuous Improvement

- Actively pursues personal growth through advanced degrees, higher education, conferences, reading professional journals, and personal reading
- Encourages professional growth in employees

Financial understanding

- Read and interpret financial statements to set goals for the school and develop plans for attaining them.

Communication

- Displays superior oral and written communication skills

Goal-Oriented

- Sets realistic, specific, and measurable goals
- Develop and execute plans to achieve goals
- Delegate and hold employees accountable for accomplishments

Management skills

- Past professional experience managing various relationships with differing expectations (i.e. teachers, staff, student body, parents, and board of trustees).
- Wide range of professional knowledge covering aspects relating to school management (i.e. overseeing professionals, building maintenance, fiscal responsibilities, government reporting, taxing responsibilities, customer relations, public relations,...).

Educational Skills

- Understand and have a working knowledge of curriculum, assessment methods, and instruction methods.

- Can make data-driven decisions regarding curriculum, assessment, and instruction.

Emotional Fortitude

- Ability to withstand criticism.
- Ability to say, “I don’t know, but I’ll find out or learn.”

Teachers

Teachers are the pivot point of education. Excelsior Academy values good teachers. Good teachers are teachable; each hones his/her skills through experience, sharing with other teachers, and through professional training and development. Teachers work as a team with administrators to produce a safe and productive learning environment. Good teachers support and accept responsibility for the entire school not just their own classroom. The academy’s teachers will be charged with helping students achieve at their highest level.

Services Provided	Responsible Party
Certification/Background Check	Director, Assistant Director
Records Management	Director, Assistant Director, Secretary
Supervision/Improvement of Instruction	Director/Mentor/Video Monitoring
Professional Development/Endorsements	Director
Core Curriculum/Lesson Plans	Director, Assistant Director, Teachers

Students

Students at Excelsior Academy will be given a safe, clean, cooperative learning environment. Counseling will be available to aid students. Students will be able to move at their own pace-accelerating their learning or gaining extra help in each learning area. Students will be tested periodically and placed according to their abilities rather than their age. Students will be required to treat others with consideration and follow the rules of each classroom and the rules of the school.

Services Provided	Responsible Party
Counseling	Director/Special Education Advisor/Specialist
Student Testing/Placement	Director/Teacher/Specialist
Student Discipline	Director/Teacher

Volunteers

Alongside a good student stands an interested and involved parent/guardian. Children mirror the values of their parents/guardians. If education is a priority to a parent it also will be a priority to the child. Parental involvement aids teachers and administrators in developing an *accelerated, personalized learning system*. The school will work to reduce the adult to student ratio to produce a more effective learning environment. Excelsior Academy places a high value on volunteers and will put them to work.

Services Provided	Responsible Party
Certification/Background Check	Director/ Assistant Director /Secretary
Supervision/Improvement of Instruction	Directors/Mentor Teachers/Video
Training/Education	Director, Assistant Director
Tutoring	Teachers, Aides, Volunteers
Club Aides	Volunteers
Teacher/Office/Janitorial Aids	Volunteers
Advisory Board/Community Council	Volunteers
Parent Teacher Organization (PTO)	Volunteers

Budget for Administrative Services

Type	Cost	Person/Company
Facility		
Maintenance/Janitorial	80,000	Full Time Employee/Contractor
Supplies and Materials	5,000	Private Contractor
Contracted Business/Accounting Services*	54,000	Charter Business Services
Attorney/Legal/Professional	10,000	Private Contractors
Administrators		
Director	62,000	To Be Announced
Asst. Director	38,000	To Be Announced
Secretary	30,000	To Be Announced
Receptionist	22,000	To Be Announced
Teachers		
Professional Development	60,000	Core Knowledge, Shirley English, Spalding, etc.
Students		
Councilor/Advisor/Mentors	-	Volunteers/Director
Volunteers		
Background Check/Security Updates	1,000	Police Department
Training	5,000	Various Organizations

**Proposed MOU (Memorandum of Understanding) is attached. Also see Memo on Procurement Procedures.*

CHARTER BUSINESS SERVICES
Proposed MOU

SCOPE OF SERVICES

SCHOOL: Excelsior Academy

Excelsior Academy Contact Person: Ann Gubler

ADDRESS: 460 South 100 West Tooele, UT 84074

PHONE: 435-882-4410

SCOPE OF CONTRACTED SERVICES

Charter Business Services (CBS) will provide the following contracted services:

1) Accounting

Accounts Payable

Paying Bills, Accounting Entries, Checks,
Approvals, Vendor Management.

Accounts Receivable

Cash Management, Bank Reconciliations, Allotment Memo

Budgeting

Monthly, Quarterly & Annual Reports.
Regular Reports to Director
State reports, Assist in budget development,
Ongoing budget changes.

Payroll

Employee files I9 & W4, Garnishments,
Paychecks, 941 deposits, 941 Reports, W2
Annual State & Fed Reports,

General Accounting & Audits

Oversee annual audit, regular journal entry,
closing books, reports, etc.

Sales Tax Reimbursements, etc.

AFR & APR Business Services contact for USOE

Not included are annual audit fees, tax preparation fees, bank or finance charges, and any other costs or fees that may result from the daily operations of the school. CBS will invoice **Excelsior** for pre-approved fees or expenses that it pays.

COST AND PAYMENT OF CONTRACTED SERVICES

The cost of contracted services is _____ per month payable on the 1st day of each month beginning August 1, 2009.

AGREEMENT

CBS and Excelsior agree that this contract may be amended or terminated with a 60 day written notice by either party. Any changes must be by written agreement signed by all parties.

CBS

Director or Designee

Title

Title

Date

Date

Procurement Procedures for Administrative Services

Excelsior Academy will follow the minimum State Procurement requirements until such time as its own Purchasing Procedures have been approved in an open meeting. These standards require Excelsior to do a formal closed bidding process or Request for Proposal (RFP) for any contract over \$50,000.

Excelsior has done a substantial amount of research regarding costs of administrative services, including review of: local CPA firms, two charter management companies, one charter services company and the possibility of hiring an in-house professional for the business services. The budget reflects what is believed to be the best value at the least cost to the school.

Section 17

Library Plan



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Principle

Excelsior Academy's library media program will be a primary resource for literacy, information and curriculum support. Excelsior Academy will work toward having a library media program with the coordination efforts of a certified library media specialist, contribute to the achievement of the desired results for student learning by providing instruction, resources, and activities that enable students and staff to become effective, independent users of ideas and information for lifelong learning.

Materials

Excelsior Academy has a goal to obtain at least 2000 books by the time school begins. The library collection will include quality fiction and non-fiction reflecting students' individual reading levels and interests. A list of classics and recommended readings will be compiled that Excelsior Academy will make a part of the library. These books will encourage students' ***broad classical foundation of knowledge*** and inspire a ***life-long love of learning***. Excelsior Academy will provide print, non-print and electronic materials that directly support the goals of the academy. The library will house supplemental curriculum reflecting a diversity of learning styles, levels of skill and cultural differences. These books and other materials will be purchased each year as part of the curriculum budget.

In addition, there will be computers for research available, along with additional educational materials, such as CD-ROMS. Children will be able to find up-to-date information on subjects in which they are interested.

Policies

Books need to be accessible to children to promote a love of reading and inspire a ***life-long love of learning***; books need to be accessible to children. Excelsior Academy will have an open-door policy for its library. It can be used at any time during school hours, and will also be available before and after school. Students will be able to use the library for reading, for project work, for small group discussions, and to collaborate whenever possible. Because of staff limitations, students will be required to check out materials at specific times daily.

As part of the ongoing mission of Excelsior Academy, students are taught respect for self, others, and property. Students will be taught proper library etiquette and standards, and expected to abide by those standards when using the library, or its materials.

Facilities

As well as the customary uses of the library, it will also be a place of synergism, a place of collaboration in a setting less formal than the traditional classroom. Because of its varied uses, the academy will strive to have a library that is large and spacious, as our facility budget may allow. The goal will be to have 1600 square feet for the library, which will be filled with shelves of books, tables for group collaboration, and computer research stations, along with nooks and crannies for students to curl up with a good book. Students will be able to use the space regularly to expand on ‘Club Time’ that take place in the classroom, yet still find it a place to escape into the mesmerizing world of reading.

Staffing

A Library Committee consisting of parent volunteers will oversee the set-up and implementation of software, all book donations, and any other library functions. The library will be staffed by volunteers the first year, have a paid part-time librarian the second year or sooner if funds allow. Excelsior Academy will work toward employing a certified library media specialist within the first five years of operation allowing the Academy to apply for Northwest Accreditation.

Goals and Objectives, Activities and Measures

The Excelsior Library has a start-up budget of \$10,000. Any books, supplies, software, or other library materials not donated will be purchased using start-up funds, as available. The Library Committee will work to get donations, both monetary and in-kind, and will have fund-raisers that will help the library dream to become a reality. Excelsior Academy will also sponsor book drives to help with the goal of having 2000 books before school begins.

Excelsior Academy will be purchasing a computer check-out system, with computer and software, as soon as our charter is approved and funding is available. After much research and deliberation, the system the academy would like to purchase is AutoLibrarian. Excelsior will also have the goal of having 3-4 research computers in the library available for student use when the school year begins, along with additional educational software.

These goals will help Excelsior Academy to have an exciting, interesting place for children to learn and explore. The library *will* encourage students’ ***broad classical foundation of knowledge*** and inspire a ***life-long love of learning***.

Excelsior Academy will always work to develop partnerships with local libraries, school districts, and bookmobiles to find innovative ways to get all the resources our students need.

Budget

Excelsior Academy's library has a start-up budget of \$10,000. The yearly budget for books or materials will come from the curriculum budget, since many books that will be purchased will be so closely aligned with 'Club Time'.

Section 18

Extra-curricular activities



Extra Curricular Activities

Excelsior Academy's mission is to instill in its students a life-long love of learning by providing a broad, classical foundation of knowledge, extra-curricular activities may be organized during the school year by the teachers, Parent Teacher Organization (PTO) or Board of Trustees to further enhance the learning experiences received in the classroom. Activities that may be offered are:

- Choir
- Chess
- Art
- Physical Education (soccer, basketball, baseball, softball)

Excelsior Academy will not deny participation in any activity to any student based on gender/religion/race as required by Federal Title IX.

Traditionally accepted extra-curricular activities, such as clubs or specialized classes are part of the regular school day curriculum at Excelsior Academy therefore we do not plan to make an agreement with the Tooele County School District to participate with them in extra-curricular activities. In the event that such an agreement becomes desirable, Excelsior Academy's Parent Teacher Organization (PTO) in conjunction with the Board of Trustees will work together with the Tooele County School District to achieve a mutually beneficial agreement.

Activities requiring fees will not be funded by Excelsior Academy; the PTO shall have the option to hold fundraisers for those activities. No student will be excluded from any activity based on inability to pay. Fee waiver applications will be available for all families and students. The waivers will be granted upon verification of eligibility, as outlined in Excelsior Academy's Procedures Manual.

Section 19

Terms and Conditions of Employment



Terms and Conditions of Employment

Excelsior Academy is an at will employer. Employees at Excelsior Academy will sign a Letter of Understanding defining their employment. This agreement may be terminated at will by either party, with or without cause, and with or without notice. The existence of the Letter of Understanding does not create any expectation of continued employment at Excelsior Academy.

Excelsior Academy will evaluate every employee at the school as outlined in the Employee Evaluation section and will consider termination if necessary to ensure that their continued employment is in the best interest of the school, its mission and educational philosophy. When the board of directors, or its designee, determines that progressive disciplinary steps, warning, or evaluations of staff are in its best interest, it will employ those tools. However, no policy, guidelines, regulation, or practice relating to the training or discipline of staff shall create any expectation of continued employment or any expectation of any particular process or disciplinary procedure. The existence of a Letter of Understanding does not create any expectation of continued employment.

Excelsior Academy will follow all Utah State and Federal Equal Employment Opportunity Laws regarding both Americans with Disabilities Act and Civil Right protections.

The Board of Directors of Excelsior Academy with The Director shall work together to create an Employee Handbook/Manual for all employees at Excelsior Academy that is clearly aligned with the mission and educational philosophy of the school. It will outline all policies and procedures regarding disciplinary actions and continued employment at the school.

Section 20

Employee Evaluation



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Employee Evaluation

All employees will be formally reviewed twice each school year according to the following guidelines.

Teacher Evaluation:

The School Director in consultation with the Curriculum Director will create an Entry Years Enhancement (EYE) evaluation rubric based on Interstate New Teacher Assessment and Support Consortium (INTASC) principles and in accordance with Utah State standards on educator evaluation.

Goal Setting:

1. The evaluation process takes place over the entire year.
2. Prior to the start of the school year, teachers prepare goals in consultation with the Director that align with the Utah State Core Standards and Practices.
3. Goals are divided into four main areas: Curriculum & Assessment, Instruction, Classroom Management, and Professional Development.

Monitoring Progress:

4. The Director or Curriculum Director will formally evaluate each teacher at mid-year and year-end using a standard rubric based on the mission and objectives of Excelsior Academy.
5. The Director or Curriculum Director will conduct periodic observations and/or reviews of student portfolios/grades/assessments during the year. These observations and reviews are directly related to the goals the teacher is working on. The Director provides oral and written feedback.
6. Throughout the year, teachers compile a portfolio that shows evidence of progress toward goals. At year-end, this portfolio is reviewed and responded to orally and in writing by the Director or Curriculum.
7. At year-end the Teachers at each grade level will conference with the following grades Teachers and Excelsior's Director(s), to provide student progress, successes, and remaining challenges for the students as a whole in that grade level.

The mid-year review of progress and other oral and written feedback from the Director during the year are formative in nature. The year-end review of progress on goals, however, is summative and is the major factor in determining continued employment and compensation.

The result of the reviews will be a perpetual development plan agreed to by the teacher and the School Director which is designed to assist each teacher

in continuing to strive for excellence in every aspect of meeting the mission and objectives of Excelsior Academy.

Teachers who require remediation will work in conjunction with the Director to create an improvement plan. If discipline is required, procedures will be followed as outlined in Excelsior Academy's Employee Handbook/Manual.

Entry Years Enhancement (EYE) Program

The following plan is designed to assist level 1 teachers' progress to level 2 statuses according to rule R277-522 and according to the mission and objectives of Excelsior Academy.

- The Director at Excelsior Academy or Curriculum Director will be level 2 or 3. In the first year of operation, if this is not achievable, at least 3 teachers in the school will be level 2.
- The Director at Excelsior Academy or Curriculum Director will mentor all level 1 teachers at Excelsior Academy.
- The Director at Excelsior Academy or Curriculum Director, as mentors, shall have completed a mentor training program including continuing professional development
- The School Director in consultation with the Curriculum Director will create an EYE evaluation rubric based on INTASC principles and according to State standards on educator evaluation.
- The School Director will use the EYE evaluation rubric in semi-annual evaluations of faculty.
- The School Director will ensure that each level 1 teacher has completed 3 years of employment and evaluation before receiving level 2 statuses.
- The School Director will ensure that each level 1 teacher establishes a working portfolio.
- Teachers will take the required pedagogical exam and be required to attain the level prescribed in rule R277-522.
- The School Director will ensure that all standards in rule R277-522 have been met for a teacher to receive level 2 statuses.

Other Employee (Non Faculty) Evaluation

- The School Director will develop a standard rubric for the evaluation of all other employees that is based on the mission and objectives of Excelsior Academy according to the charter.
- Supervisors will use the standard rubric to create a report for each employee under their supervision that will be given to the School Director.
- Each employee will meet with the School Director for a review following the reports from their supervisors.
- The result of the review will be a development plan agreed upon by the employee and the School Director which is designed to help each employee reach a level of excellence in every aspect of the mission and objectives of Excelsior Academy.

Section 21

Employment of Relatives



Employment of Relatives

Excelsior Academy's Policy and Procedures will state that no employee may be under the supervision of a direct relative or any person deemed to be in such a position.

When applying for employment at Excelsior Academy, any candidate, direct relative or otherwise, will be considered for positions based on qualifications and experience, not on family relationships. Each candidate must follow interview and hiring procedures as outlined by the Board of Trustees.

In the event that the candidate being considered for employment is a direct relative of a member of the Board of Trustees that Trustee will not vote on the decision to hire the candidate.

Section 22

Insurance



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Insurance

Excelsior Academy will purchase liability insurance from the Utah State Risk Management. Below is what has been available for the current school calendar year and is an approximation of what may be offered to Excelsior Academy following approval. Excelsior Academy will keep an active insurance certificate at all times, and will ensure that it is a priority in the schools budget.

Liability Insurance

Coverage - up to \$2,000,000

Deductible - \$0

Premium - \$18 per student with a \$1,000 minimum per school.

Property Insurance

Coverage - up to replacement value of the property as estimated by the school at the beginning of the fiscal year

Deductible - \$1,000 per occurrence

Premium - \$100 minimum premium for up to \$100,000 in value

Vehicle Comprehensive/Collision Insurance (only if needed)

Coverage - the cost of repairs to the school's vehicle, but not in excess of the current value of the vehicle

Deductible - \$500 per occurrence

Premium - \$150 per year per vehicle.

Employee Dishonesty Bond

Coverage - the amount of a proven loss

Deductible - \$0

Premium - \$250 a year

Excelsior Academy will also purchase Directors and Officers insurance, for their protection. We have contacted Curry Insurance. They are available to provide D and O insurance for Excelsior Academy.

CURRY INSURANCE AGENCY, INC.
PO BOX 739 553 North Main
Tooele, UT 84074

To Whom It May Concern:

10 October 2007

Please be advised that we are able to provide D & O coverage for Excelsior Academy. This coverage would be for the directors, officers, and board members of the charter school to protect them for certain acts and decisions they make while acting in their official capacity for the school. We would be able to provide coverage up to \$10,000,000 aggregate limits if they desire. This coverage offer would be subject to them meeting the normal underwriting guidelines associated with this type of coverage.

Please feel free to call me if there are any questions at (435)-882-1216.

Best Regards,

MAX M. CURRY, AGENT

Section 24-27

Assurances, Additional Information, Retirement



Section 24

Assurances

UTAH CHARTER SCHOOLS Assurances

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

- A. The charter school will make provision for such fiscal control and fund accounting procedures as may be necessary to assure proper disbursement and accounting for all funds.
- B. The charter school will maintain a clear, written procedure and process for auditing school finances as per the requirements of the Utah State Office of Education.
- C. The charter school gives the Utah State Office of Education or the U.S. Comptroller General, through any authorized representative, the access to, and the right to examine, all records, papers, or other documents related to all funds, including the submission of reports as may be required.
- D. The charter school will annually provide written evidence of liability and other appropriate insurance coverages, including a description of the levels of coverage and the relationship of these coverages to local and state agency obligations.
- E. The charter school will make such reports, including reports of evaluations, in such form and containing such information as the State Superintendent of Public Instruction may reasonably require to carry out his legislative functions and to determine the extent to which funds have been effective in carrying out legislative purposes and project objectives.
- F. The charter school will comply with appropriate rules, regulations, and state guidelines except as specifically waived by the Utah State Board of Education or Legislature, and effective control will be maintained over, and accountability provided, for all funds, property, and other assets. The charter school will also adequately safeguard all public property and shall assure that it is used solely for authorized purposes.
- G. After settling any outstanding debt, all physical assets owned by the charter school become the property of the Utah State Board of Education upon the termination of the charter school.
- H. The charter school will comply with the requirements of the Family Educational Rights and Privacy Act of 1974.
- I. The charter school will not discriminate in program benefits, participation, employment, or treatment on the basis of race, color, religion or national origin, and will comply with the provisions of Title IX of the Education Amendments of 1972 prohibiting discrimination on the basis of gender.
- J. The charter school assures that no otherwise qualified person shall, on the basis of a disability, be excluded from participation in, be denied the benefits of, or otherwise be subjected to discrimination under any program or activity that receives or benefits from local, state, or federal financial assistance.
- K. The charter school will not expend program funds for any education program, activity, or service related to sectarian instruction or religious worship.

L. The charter school will function under an open admission policy. If the number of students applying to enroll at any grade level exceeds the capacity of the school or of, classes, or grade levels within the school, then those to be admitted shall be chosen at random from among the applicants, within the allowable mandatory and optional preferences specified in Section 53A-1a-506, Utah Code Annotated.

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

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

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

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

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

Q. The charter school will employ the use of the Iowa Test of Basic Skills and the Utah State Core Course End-of-Level Tests in the grade levels required by U-PASS as a fundamental part of the overall assessment program for the school.

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

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

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

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

V. The charter school will operate under the provisions of the Utah Open Meeting Law and adopt bylaws in an open meeting.

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

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

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

Z. The charter school will acquire and maintain nonprofit corporate status.

AA. The charter school will follow all state procurement rules.

BB. The charter school will maintain accurate student transcripts.

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

Name (type): Ann Gubler

Title (type): Chairwoman Excelsior Academy Board of Directors

Signature: _____

Date: _____

Admission Procedures

Admission is not limited based upon ethnicity, national origin, religion, gender, income level, disabling condition, proficiency in the English language or athletic ability. There are no tuition or fees charged for attending **Excelsior Academy** Charter School except those allowed by law.

Excelsior Academy Charter School will admit all eligible pupils who submit a timely application. A charter school shall give enrollment preference to children of founding members, pupils returning to the charter school in the second or any subsequent year of its operation and to siblings of pupils already enrolled in the charter school. If, by the application deadline, the number of applications exceeds the capacity of a class, grade level, or building, all applications for that class, grade level or building will be selected for the available slots through a lottery, except that preference as allowed in law shall be given. After the application deadline, pupils for any remaining slots will be accepted in order of their lottery position. If an opening in the school occurs mid-year and no students remain from the original lottery, a notice for applications will be announced and applicants enrolled on the same basis as outlined above.

These admission procedures have been approved in legislation and by the Utah State Board of Education. If you have other administrative details of how you intend to facilitate acceptance of applicants to your school, they should not be in conflict with the language noted above.

Proof of Insurance

Excelsior Academy Charter School will provide to the Board a certificate of insurance before the first day of school in its initial year and annually thereafter.

Electronic Data Submission

Excelsior Academy Charter School will have the technology and ability to meet all of the electronic data submission requirements for charter schools.

Nonsectarian Statement

Excelsior Academy Charter School is nonsectarian in its programs, admission policies and employment practices and all other operations.

Special Education/Exceptional Student Services Training

The applicant/authorized signer for **Excelsior Academy** Charter School will take a one-day Special Education training class sponsored by the Utah Department of Education subsequent to signing the contract, but prior to the first day of instruction and annually thereafter.

Ann Gubler

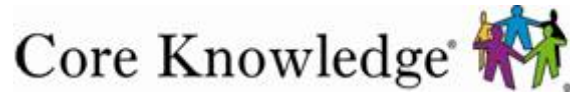
CAO (please print)

CAO's Signature

Date

Section 26

Additional Information/Letters of Support



The Core Knowledge Foundation

Letter of School Support

July 3, 2007

Ann Gubler

Chairman of the Board of Excelsior Academy

Dear Ms. Gubler:

We are pleased to hear of your interest in implementing the Core Knowledge[®] Content Guidelines in your school, Excelsior Academy. I am pleased to describe how we at the Core Knowledge Foundation plan to work closely with you and your faculty pending formal approval of your charter school application.

The Core Knowledge Foundation will work with your staff to implement a specific, sequential, and content-based curriculum. As you know, the Core Knowledge Content Guidelines emphasizes the knowledge base of students in core academic disciplines, while at the same time it helps students make connections across content areas. The Core Knowledge program also helps teachers understand where each grade level fits into the overall instructional plan by providing a sequenced body of knowledge from pre-K to eighth grade. In this manner, teachers can get a “big-picture” sense of what knowledge their students have been exposed to in the prior grade and of what “follow-up” knowledge will follow in the next grade. Having this “big picture” should enable them to minimize repetition of material that has already been taught, and instead should help them focus on using their class’s prior knowledge to push forward toward more learning.

The Core Knowledge Foundation’s staff of expert professional development trainers will work with you and your faculty to develop a curriculum plan for teaching the Core Knowledge content. We will also help you align this curriculum plan with your required standards. In addition, we will help teach your teachers how to develop effective Core Knowledge lessons and assessments during professional development workshops. Moreover, each year selected members of your staff will also have the opportunity to attend the Core Knowledge National Conference. This conference provides updated information and numerous opportunities for networking with Core Knowledge teachers throughout the United States.

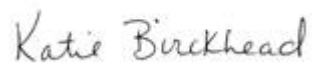
After the curriculum plan and lessons for teaching the Core Knowledge Content Guidelines are in place, the Core Knowledge Foundation will continue to support your faculty by conducting follow-up visits throughout the academic school year. These visits will provide continuous feedback on the implementation of Core Knowledge to your teachers and administrators, helping everyone to maximize their strengths and improve in areas of difficulty.

The Core Knowledge Foundation can also assist your school staff in locating and acquiring Core Knowledge and related resources. This support will allow your school to obtain a variety of materials appropriate for teaching the Core Knowledge Content Guidelines.

All of us at the Core Knowledge Foundation look forward to working with you and your staff and are confident that they will find the Core Knowledge program beneficial.

I have attached various cost estimates depending on your level of implementation and the number of staff at your school. Should you have any questions about the attachments or this *Letter of School Support*, please contact me at the Core Knowledge Foundation, 800-238-3233 X356.

Sincerely,

A handwritten signature in cursive script that reads "Katie Birckhead".

Katie Birckhead

Director, K-8 Professional Development



KEITH R. RUSSELL, P.E.
DAVID A. JENSEN, PE, SE
DAVID B. ALTER, PE
DOUG KINSMAN, PLS
PAT HARRIS, PLS
KENNETH W. MATSON, PE, PLS
ROBERT G. ELDER, PE

October 22, 2007

Utah State Office of Education
250 East 500 South
P O Box 144200
Salt Lake City, Utah
84114-4200

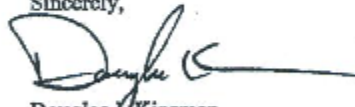
Dear Utah Charter School Board Members:

I am writing this letter to show my support for the charter school, Excelsior Academy, in Tooele County. I believe this school will benefit the residents of the Tooele Valley by providing an opportunity for excellence in education. The mission of the school to provide individual learning and create a life long love of learning will inspire and serve each student, their families and the community.

I appreciate the concept of greater parent involvement and know that by design Excelsior Academy will be successful because of this. It is well known that students with parent involvement will be more successful academically.

I understand the need for quality education and am excited about the opening of the Excelsior Academy in Fall of 2009.

Sincerely,



Douglas Kinsman
Principal

Salt Lake City
90 E Fort Union Blvd Ste 100
Midvale UT 84047
Phone: (801)286-0829
Fax: (801)255-4448

Layton
1485 W Hillfield Road Ste 204
Layton UT 84041
Phone: (801)547-1100
Fax: (801)583-8315

Pleasant Grove
795 South Main Street
Pleasant Grove UT 84062
Phone: (801)796-8148
Fax: (801)796-8147

Tooele
7 S Main Street
Tooele UT 84074
Phone: (435)843-3880
Fax: (435)578-0108

www.ensignutah.com

Excelsior Academy250

Dr. Patricia McWhorter, Licensed Psychologist

*Forty South Main
Tooele, Utah 84074
(435) 843-7060*

February 18, 2008


Utah State Office of Education
250 East 500 South
P.O. Box 144200
Salt Lake City, Utah 84114-4200

Dear Members of the Utah Charter School Board,

I am writing on behalf of an application to open a charter school, Excelsior Academy, in Tooele County. As a psychologist who practices and serves children, adolescents, and families in greater Tooele County, I have seen a need in this community for several years now.

Our community in Tooele County has significantly grown over the past several years. Our demographics, consequently, have necessitated the need for alternatives in quality education for our youth. What I have repeatedly observed firsthand is this: if families wish to enroll their children in schools other than what is currently available through the public school system, they are forced to commute to Salt Lake County. This represents a tremendous burden on the families who are nevertheless willing to make that sacrifice to provide for their children's education.

The addition of a charter school such as what is proposed by Excelsior Academy would be a welcome addition to Tooele County by those of us who live and work here, and call this community our home.

Best regards,

Dr. Patricia McWhorter
Licensed Psychologist

Mountain West Pediatrics &
Bedtime Kids Care
196 E 2000 N
Suite 104
Tooele, UT 84074



October 22, 2007

Utah State Office of Education
250 East 500 South
P O Box 144200
Salt Lake City, Utah
84114-4200

Dear Utah Charter School Board Members:

I am writing this letter to show my support for the charter school, Excelsior Academy, in Tooele County. I believe this school will benefit the residents of the Tooele Valley by providing an opportunity for excellence in education. The mission of the school to provide individual learning and create a life long love of learning will inspire and serve each student, their families and the community.

I appreciate the concept of greater parent involvement and know that by design Excelsior Academy will be successful because of this. It is well known that students with parent involvement will be more successful academically.

I understand the need for quality education and am excited about the opening of the Excelsior Academy in Fall of 2009.

Sincerely,

A handwritten signature in cursive script that reads "J. M. J. Gould, MD".

Name *J. M. J. Gould, MD*
Title *Pediatrician*



November 29, 2007

Utah State Office of Education
250 E. 500 S.
PO Box 144200
Salt Lake City, Utah 84114-4200

Dear Utah Charter School Board Members:

It has come to our attention that a movement has been started to open a charter school in Tooele County. I understand the name would be Excelsior Academy. I believe this would be a great asset to our county. I know of no other charter school here. Transcript Bulletin Publishing would like to show our support for the school. As we've studied the plan, we can see the potential it has in benefiting those students that would attend, but also the county as a whole. I'm impressed with the professionalism of those putting this together. They have a clear view of how to make the school succeed.

I encourage you to approve their application and make this dream, a dream of so many, a reality. If you have any questions, please feel free to give me a call.

Sincerely,

Scott C. Dunn
President/Publisher

Excelsior Academy248

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Utah State
UNIVERSITY
EXTENSION

TOOELE COUNTY
151 North Main
Tooele, UT 84074

Phone: (435) 843-2350
Fax: (435) 843-2355

October 5, 2007

Dear Utah State Board of Education,

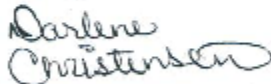
I am writing this letter of support for the opening of the charter school, Excelsior Academy, in Tooele County. As a Utah State University Extension Assistant Professor, I appreciate and value the philosophy of the academy. By providing individual attention to a child's capability in each subject matter, the school will greatly enhance a young person's ability to learn.

One clear advantage a charter school has over our traditional public schools is the fact that, by law, parents must be involved in their student's education. Research has shown us again and again that students do better socially and academically if parents are involved in their education.

Throughout my career I have worked with several 4-H youth who have attended charter schools. It is my belief that those students are fully capable to successfully continue their education at a public high school and college.

I wholly support the opening of the Excelsior Academy in August 2009. Please contact me if you have any questions or would like further information about my support for this valuable undertaking.

Sincerely,



Darlene Christensen
Utah State University Extension
Assistant Professor/Extension Agent
Tooele County

Utah State University is an affirmative action/equal opportunity employer and educational organization. We offer our programs to persons regardless of race, color, national origin, gender, religion, age, or disability.

Excelsior Academy 251

Extending USU to You

Section 27

Utah State Retirement

Excelsior Academy will **NOT** participate in the Utah State Retirement Plan. Excelsior Academy will offer a flexible and economical retirement program for all eligible employees directed by a qualified investment professional.