PREFACE

We are grateful for the continued support of staff and valuable feedback we received from the board while meeting with them in August. While not part of our application, we wanted to specifically acknowledge in this preface each criticism and key point that the board wanted clarity on from our initial application and presentation. What follows is a list of the board's feedback that we extracted from the August meeting with an associated brief response and a mention to the specific section in our application that addresses these points in more detail.

Balancing Customization with Rigor:
Custom Class Charter School (Custom Class) strikes a balance between customization and rigor by employing a mastery-based learning model that aligns with Utah Core Standards and the Portrait of a Graduate. This approach starts with the establishment of learning goals and clear success criteria by educators. These success criteria align to standards, but are curriculum agnostic. This allows students to select among our evidence-based curricula and learning tools to meet their unique needs while ensuring that they meet clearly defined success criteria, promoting both personalization and accountability. For details, refer to Section 3, "Flexible Learning Paths and Success Criteria".

Distinction from Other Online Offerings:
Custom Class distinguishes itself from other online state options by focusing on demonstrating mastery of learning goals and Portrait of a Graduate competencies, not just completion of online curriculum. Several unique opportunities are offered to make this a reality including Bachelor's degrees in high school and Community Liaisons that will connect students with their community to help meet these objectives. Family Service Centers will offer tutoring, hands-on learning in makerspaces, counseling, and wellness workshops to develop students holistically. Finally, flexible terms allow families to have the option to enroll in terms that best suit their family and other commitments. These distinctions are described in detail in Section 4, "Market Analysis and Unique Characteristics" for details.

Serving SPED Students in an Inclusive Environment:
To ensure an inclusive experience, Custom Class provides students with disabilities access to a range of supports, including assistive technologies and individualized learning plans, both online and in-person at our Family Service Centers. This hybrid structure mitigates concerns about restrictive environments by offering accessible options for learning, support, and opportunities not offered by many other online schools to interact socially with peers, staff, and local partners both face-to-face and online. For more information, see Section 3, "Meeting the Needs of Students with Disabilities".

Enrollment Projections and Demand Analysis:
Custom Class's Board has reduced maximum enrollment upon the board's recommendation. Current enrollment projections are backed by our market surveys and statewide data indicating strong demand for flexible, online, personalized learning options. Projections account for current trends in online and hybrid education, as well as a market analysis of Utah's homeschooling population. For the full analysis and supporting data, see Section 4, "Enrollment Projections and Market Analysis".

Teacher Responsibilities are Essential:
Custom Class upholds a comprehensive instructional model, ensuring that teachers maintain the

primary responsibility for instruction and student success. Teachers collaborate with families, paraprofessionals, and community liaisons to facilitate experiential learning but remain the central figures in achieving the core standards. For more description on the roles of our teachers, see Section 6, “Typical Day for a Teacher at Custom Class Charter School”.

Scalability and Community Participation:
Community partnerships are integral to Custom Class, with a scalable model that employs Community Liaisons to involve local mentors and business partners for internships, job shadowing, and project-based learning. As demand grows, these partnerships will expand to meet diverse student needs. A significant portion of our staffing budget pays for multiple Community Liaisons who have this as a focus. For more details, see Section 2, “Key Elements and Defining Characteristics”.

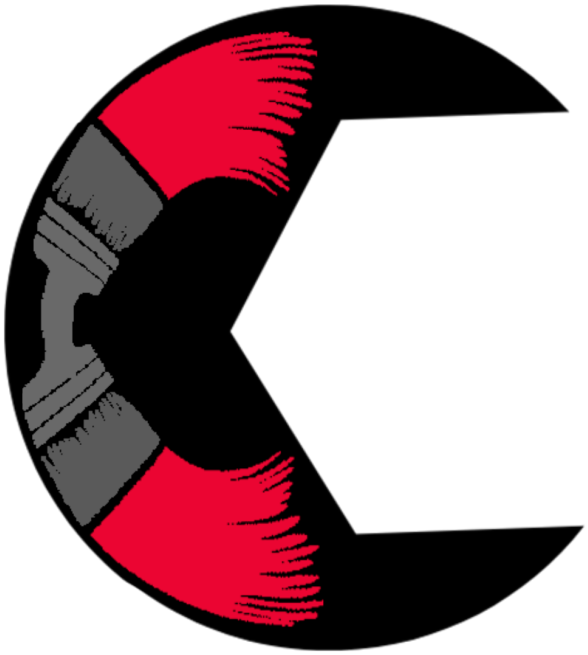
Family Service Centers and Physical Locations:
The Family Service Centers will be strategically located across the state. Rather than predetermining the location of these Family Service Centers, we will position these locations as the market demands, with a goal of providing accessible in-person support within one hour’s drive of 85% of our students. This will allow for the appropriate location of these Family Service Centers to provide several services, including tutoring, counseling services, workshops, hands-on projects, and state-mandated testing. For budgetary allocations and facility details, see Section 7, “Facility Needs Based on Educational Program and Enrollment” as well as our Budget in Appendix M.

Flexible Scheduling and Funding:
Flexible scheduling at Custom Class allows students to progress year-round as needed. The school’s budget supports year-round services and complies with Average Daily Membership and Learner Validated Attendance tracking requirements to align with state laws. For specifics, refer to Section 7, “Policies for Enrollment, Attendance, and Program Tracking”.

Technology Access for All Students:
Custom Class ensures equitable technology access by providing all students with devices and internet access points. These resources enable all students to fully engage in online learning, regardless of economic or geographic barriers. The purchase of student Chromebooks and internet services are included in our budget for each year of operation. For more information, see Section 3, “Supporting Educationally Disadvantaged Students”.

Addressing Grade-Level Variance in Instruction:
Custom Class accommodates students who need to build background knowledge and master prerequisite skills. We achieve this by offering customized instruction and intervention options, while at the same time offering grade level appropriate materials and instruction that meets state standards for each child’s enrolled grade level, ensuring all students are adequately prepared for testing requirements. See Section 3, “Additional Support for Students”.

Community Involvement for Younger Students:
For younger students, Custom Class integrates community involvement through structured activities at Family Service Centers and partnerships with local organizations for camps and workshops helping foster academic and social skills alongside real-world experience from an early age. For more, see Section 5, “Community Connections and Engagement”.



CUSTOM CLASS
CHARTER SCHOOL

New Charter School Application

Submitted November 1st, 2024

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Requested APPENDICES E, F, and H are not applicable and have therefore been omitted.

Required Technical Information

Proposed Charter School Name:
Custom Class Charter School

Name of Applicant(s):
Red Rock Hockey League

Authorized Agent:
Matthew J. Middione, Ph. D.

Mailing Address:
3083 E 2890 S Circle
St George, UT 84790

Phone Number:
435 680 8046

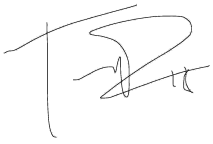
Email Address:
mattmiddione@gmail.com

New Charter School Location and Location's School District:
Custom Class Charter School (Custom Class) will be a state-wide, online charter school.

Date and To Whom Submitted at the District(s) Office:
Oct 30th, 2024 to all district Superintendent's via their Administrative Assistants

Governing Board Information:

Name	Position on Board	Area of Expertise	Any Previous or Current Charter Affiliation:
Cory Henwood	**Board Chair**	**LEA Systems Leadership, Utah Grants, Online Learning.**	**None**
Signature:			
Matthew J. Middione, Ph.D.	**Board Vice Chair**	**Research, Charter Leadership, Fundraising**	**Vista Charter School Board**

Signature:			
Tom Rupp	**Board Treasurer**	**Loans, Credit, Social Media Marketing, Home Schooling**	**None**
Signature: 			
Douglas Reed	**Member**	**Industry Certification, Business Mentors, Community Building**	**None**
Signature:			
Cody Saulpaw	**Member**	**Financial Planning, Chamber of Commerce, Sponsorship**	**None**
Signature:			

Charter School's Reported Grade Configuration and Maximum Authorized Enrollment:
Custom Class Charter will serve students in grades K-12, with grades K-8 housing the majority of students initially and grades 9-12 filling up progressively over time, as shown on the next page.

Does the proposed grade configuration match the district of residence grade configuration?

☑ **Yes** ☐ **No**

Explanation: Proposed grade configuration does match the state of Utah grade configuration, as this is a state-wide online school.

Projected Number of Students to be Served in Each Grade for Annual Projection Counts:

	K	1	2	3	4	5	6	7	8	9	10	11	12	MAX
Year 1	40	40	40	40	40	40	40	40	40	15	15	5	5	400
Year 2	50	50	50	50	50	50	50	50	50	50	30	20	10	560
Year 3	80	80	80	80	80	80	80	80	80	70	60	40	30	920
Year 4	100	100	100	100	100	100	100	100	100	90	80	70	50	1190
Year 5+	115	115	115	115	115	115	115	115	115	100	100	90	75	1400*

*Max enrollment reduced from initial proposal as recommended by board

Are you proposing waiver(s), special treatment, or priority consideration allowable by statute or rule?
☐**Yes** ☑ **No**

Explanation: Custom Class is not seeking any waivers or priority treatment.

I, THE UNDERSIGNED, do hereby certify that, to the best of my knowledge and belief, the data in this proposal are true and correct. Therefore, this proposal for charter school status and funding is hereby submitted with the full approval and support of the applicants and governing body of the proposed charter school.

Name of Authorized Agent: Matthew J. Middione, Ph.D., Board Vice Chair
Signature of Authorized Agent:

SECTION 1: Executive Summary

Mission:
Custom Class empowers students by establishing rigorous outcomes for learner development while providing customizable support that is tailored to the needs of learners and their families.

Vision:
Custom Class envisions a future where every learner has the support to customize their educational path so that it prepares them for success in college, career, and life.

Introducing the Custom Class Board:
The Custom Class Board is composed of experienced community leaders, educators, and professionals united by a common goal: to provide students with a customized educational model that prioritizes both academic excellence and personal development. Originating from the Red Rock Hockey League, the board initially came together with the mission to foster confidence and life skills in children through the sport of ball hockey. Over time, this passion expanded to include education as a means of empowering children and youth beyond the sports arena. Our board members bring decades of experience in areas such as education, curriculum development, online learning, community engagement, finance, and nonprofit leadership. This diverse expertise ensures that Custom Class will be well-positioned to meet the educational and personal development needs of its students.

Board Origins:
The Custom Class Board grew from a community initiative focused on developing confidence and life skills through sports, particularly ball hockey. The board members, united by a desire to create opportunities for the children in their community, began to see the potential of expanding this mission into the realm of education. Since its inception over two years ago, the board has grown to serve hundreds of children and their families, extending beyond sports-specific skills to foster a broader set of competencies in each child, including self-esteem, resilience, and leadership among other skills aligned with the state's Portrait of a Graduate. The transition to creating Custom Class was a natural progression of this mission, driven by the belief that education should be as empowering and personalized as the opportunities our non-profit has previously provided.

Rationale for the School:
Our experience as a board in working with families through community partnerships and sports has shown us the power of a community coming together to develop life skills within youth. We are dedicated to expanding these opportunities into a flexible, online learning environment that empowers students to take control of their academic journey. With a focus on life skills as well as academic rigor, Custom Class offers a unique approach to education that meets the demands of today's families who seek more than traditional academic measures. Our school will provide a highly flexible, personalized experience that blends rigorous academic standards with the development of essential life skills noted in Utah's Portrait of a Graduate, ensuring that students are prepared for both college, their career, and whatever life throws their way.

Main Points about the School:
Custom Class is designed to meet the needs of the population of students and families seeking a flexible, personalized, and rigorous educational experience. Our innovative online platform that highlights educational outputs and achievement, over curricular inputs, combined with our commitment to developing both academic and life skills from Utah's Portrait of a Graduate, sets us apart as a leader in the next generation of education. We will connect students and families with our educators to develop these skills, as well as connecting them with their community, higher education institutions, businesses, and local employers to get a head start on life after school. This school will serve students throughout the state of Utah as an online option with the opportunity for hybrid in person services. With a dedicated and experienced board, strong community partnerships, and a focus on mastery-based learning, Custom Class will provide Utah families with an educational option that prepares students for success in college, career, and life. We are excited to offer this unique model to the state and look forward to contributing to the future of education in Utah.

Outcomes Based: Portrait of a Graduate Competency & Mastery-Based Advancement
Most schools operate in a way where they have determined the inputs on learning (curriculum, instructional supports, place of learning etc.), and hope that students all get to an acceptable outcome. At Custom Class we expect students to achieve the outcomes we put forward, and will provide flexibility in the inputs on learning that will be customized, based on the needs of the learner and their families. We will ramp up the resources and structures we provide for learning in our multi-tiered systems of support, intervening with students who need additional aid to reach our intended outcomes. Learners will advance based on demonstrated proficiency in the outcomes established from Utah's Core Standards and Utah's Portrait of a Graduate.

Competency Based College Credits: High School Students Earning a Bachelor's Degree
Custom Class will provide funding and support for students to dual enroll in select colleges, offering them the ability to earn college credit as quickly as they are able to demonstrate competency. Our board chair has experience with these programs, where just last year, 3 of the students at one of his schools earned their Bachelor's degree while still in high school and many others earned their Associate's degree. He has partnered with schools such as Snow College, Southern Utah University, University of Utah HSUP, Southeast University, and Southern New Hampshire University to make this a reality for students. In addition to these schools where our board has established connections we are also exploring partnerships with Utah Tech University and West Texas College. This full list of potential post-secondary partners will hereby be referred to as "our list of potential post-secondary partner institutions".

Community-Centered Approach: *Developing Skills & Knowledge with Community Partners*
At Custom Class, we believe that education does not happen in isolation. Our school is designed to integrate the resources and expertise of the broader community into the learning experience. Through partnerships with local businesses, mentors, and organizations, students can engage in real-world learning experiences that extend beyond the virtual classroom. Whether it's through internships, community projects, or skill-building workshops, students will have the chance to apply their academic learning in meaningful ways that contribute to their personal and professional growth. By leveraging community resources, Custom Class will

provide students with a Community Liaison that will help curate these experiences leading to a well-rounded education that prepares them for the demands of life beyond school.

Customized Support: *Family Service Centers, Makerspaces, and Flexible Calendar Terms*
Custom Class will provide students and families with flexibility in how, when, and where they achieve educational outcomes. The school will offer a customizable online learning platform that allows students to advance based on demonstrated competency, rather than being constrained by traditional seat time requirements. In addition to flexibility in pace, students can opt to participate in school during the term that makes the most sense for them and their family, whether that is the traditional four quarter school year or replacing one of those terms with a summer term/s. Students could also opt to add on a summer term to catch up or get ahead in their coursework. Families are not left to work in isolation, but have the option to make use of our Family Service Centers which will include resources for learning such as tutoring, maker spaces that will include equipment and materials for hands-on creation and projects, workshops for developing life skills, as well as counseling and spaces that promote all aspects of wellness.

Why Custom Class Should Be Approved:
Custom Class is uniquely aligned with the State Charter School Board's mission and vision by offering an innovative and flexible approach to education that is not currently available. Our school will emphasize mastery of both academic content and life skills, based on the Utah Portrait of a Graduate competencies. By offering customizable educational pathways and allowing students to advance based on demonstrated proficiency, Custom Class will close the gap for students who thrive in non-traditional learning environments. Our online platform will provide an accessible and flexible model that caters to the needs of diverse learners across the state, ensuring that every student has the opportunity to succeed on their own terms. In addition to our unique educational model, our board brings extensive experience in founding and managing schools, building community partnerships, financial management, and fostering non-profit growth, which positions Custom Class for success. Our expertise and past achievements within similar educational programs underscore our capacity to deliver on this mission.

SECTION 2: School-Specific Elements

Purpose of the School:
Custom Class meets all of the legislative purposes of Utah's Charter Schools. One purpose we will focus on is to establish a new educational model with new forms of accountability that emphasize unique performance measures (Legislative Purpose "e"). Custom Class embodies Utah's vision for charter schools by pioneering a flexible, customized educational model where inputs such as curriculum, instructional support, and learning environments are tailored to each learner's individual strengths and interests. Learners and their families will have the agency to choose from options that align with the intended outcomes. However, providing this degree of flexibility does not come at the expense of accountability.

Our model focuses on confirmed outcomes, utilizing performance measures that extend beyond academics. Custom Class will measure progress towards all 13 competencies outlined in Utah's Portrait of a Graduate, ensuring that students are not only academically proficient but also developing the critical life skills needed to succeed in the modern world. Although the Utah State Board of Education (USBE) has defined the Portrait of a Graduate as a "north star" for system transformation[1], many schools have yet to fully operationalize these competencies. Custom Class is committed to doing just that.

Our approach will be aligned with USBE's Next Generation School Accountability Plan[2], utilizing the performance measures and tools established by the USBE to track both academic and life-skill development[3]. This new form of accountability will set Custom Class apart from other charter schools, as we will lead the way in preparing students holistically for the future. The uniquely human intelligence and skills defined in the Portrait of a Graduate are growing in value, and Custom Class is dedicated to ensuring that our students are prepared to succeed in this evolving landscape.

Key Elements and Defining Characteristics:
Custom Class is defined by several unique elements that align with our mission of providing flexible, personalized learning options:

- **Customizable Educational Pathways:** Students will be empowered to choose their curriculum, instructional support, and learning environment, tailoring their education to fit their individual needs and learning styles. This allows for a more personalized and engaging learning experience. Although these learning inputs are customizable, the expected outcomes will be rigorous and clear so that students can use a variety of evidence to showcase they have met our success criteria[4].
- **Mastery-Based Learning:** Students advance based on demonstrated proficiency rather than seat time. This ensures that all students are adequately prepared for the next level

[1] https://schools.utah.gov/board/utah/strategicplan under the tab of "Portrait of a Graduate"
[2] See the full report in **Appendix K**.
[3] See the full report and detailed competency rubrics in **Appendix I**.
[4] See our template for learning goals and success criteria in **Appendix J**.

of their education, while allowing those who excel to move forward at an accelerated pace. The expectation of mastery extends beyond academic standards to life skills.

- **Competency-Based College Credits:** Custom Class offers high school students the opportunity to earn college credits through dual enrollment programs with institutions such as those in “our list of potential post-secondary partner institutions”. Students will be able to accumulate college credits while still in high school, preparing them for higher education and reducing the cost of post-secondary schooling.
- **Community Partnerships:** Custom Class integrates community-based learning opportunities into its educational offerings, allowing students to engage in real-world experiences through internships, mentorships, and service projects. Coordinated by our multiple Community Liaisons, these partnerships ensure that students can apply their academic knowledge to practical situations and develop essential life skills in collaboration with community professionals.
- **Family Service Centers:** These centers will serve as in-person hubs where students and families can access additional resources such as tutoring, counseling, wellness activities, personal development workshops, and makerspaces for hands-on learning with tools like 3D printers and laser engravers. The centers will also be spaces where students can engage in collaborative projects and social activities, creating a sense of community within the online school environment.

Enrollment Policies:

Custom Class will enroll students in compliance with state and federal education law, using a lottery system when necessary. The following policies will govern enrollment:

- Open enrollment for the 2026-2027 school year will begin on January 2, 2026, and close on February 28, 2026. For subsequent school years, open enrollment will start by February 1st and remain open for approximately 90 days.
- If enrollment does not exceed the maximum, as stated in the Enrollment Chart, all applicants will be contacted to complete the enrollment process.
- If open enrollment exceeds maximum capacity, an electronic lottery will be held on March 8, 2026, for the 2026-2027 school year, and within five school days from the close of open enrollment in subsequent years.
- Students selected via the lottery will be notified and have until April 10, 2026, to confirm their enrollment for the 2026-2027 school year. In future years, students will have at least two weeks to confirm enrollment. If confirmation is not received by the stated deadline, the spot will be opened to other students.
- Students not selected in the lottery will be placed on a waitlist, ranked in the order of their sign-up during open enrollment.
- Beginning March 20, 2026, for the 2026-2027 school year, students on the waitlist will be offered spots as they become available. For future school years, waitlisted students will be contacted as spaces open, with priority given based on waitlist rank.
- After the initial enrollment period, new students will be placed on the waitlist and offered enrollment as space allows. When a space becomes available, the family at the top of the waitlist will be contacted and given three school/business days to respond. If the

family does not respond or declines enrollment, the next family on the waitlist will be contacted.

Preferred Enrollment Policies:
In accordance with Utah legislation 53G-6-502, Custom Class will allow preferential enrollment to certain student populations, as permitted by state and federal law:

- Children of employees of Custom Class.
- Children or grandchildren of individuals who contributed to the development of the charter school.
- Children or grandchildren of members of the Custom Class governing board.
- Siblings of currently enrolled students.
- Students articulating from another charter school pursuant to an articulation agreement approved by the State Charter School Board.
- Children of military service members as defined in Section 53B-8-102.

Custom Class is committed to extending quality education to all students regardless of family income, socio-economic status, ethnicity, special education needs, or homeless status. Enrollment will not be influenced by these factors, ensuring equitable access to education for all students throughout Utah.

Mission-Specific Goals:
Custom Class's mission-specific goals focus on both life skill development, aligned with Utah's Portrait of a Graduate, and career and college readiness measures that align with the school's mission and vision.

- **Competency Development of Portrait of a Graduate Skills:** At least 85% of Custom Class students will demonstrate competency in grade band expectations outlined in the rubrics provided by USBE for select Portrait of a Graduate skills such as academic mastery, creativity, and collaboration.
- **College and Career Readiness:** By graduation, all Custom Class students will have completed at least one of the following: 15 college credit hours, an industry-recognized certification, a professional internship in their chosen field, or the creation of their own business. This will ensure that students are well-prepared for success in post-secondary education or the workforce.

Rigorous and Achievable Academic Goals:
These goals ensure that Custom Class students will meet benchmarks in academic and personal development milestones, preparing them for success in college, career, and life. We know these expectations are rigorous and will be challenging for our students, but through our innovative, flexible, and community-based approach, we are committed to fostering positive outcomes for all students. Avoiding a one-size-fits-all approach, we will find a way to capitalize on each student's motivation for their custom tailored education which we will help align to their interests to allow each student to demonstrate competency in the way that is most meaningful and attainable for them.

SECTION 3: Program of Instruction

Philosophical Approach to Educating Students:
Custom Class embraces a student-centered, mastery-based approach to learning that is grounded in evidence-based best practices, including the principles of student agency, teacher clarity, and mastery learning[5]. This approach is supported by a growing body of research and aligns with the influential work of educational thought leaders such as John Hattie and Thomas Guskey. At its core, Custom Class prioritizes giving students and their families the flexibility to shape their educational experience, ensuring that learning is tailored to each student's unique needs, interests, and abilities.

We believe that students should be active participants in shaping their educational journey. Custom Class fosters this agency by empowering students to select from various curricular tools, learning environments, and instructional supports that align with clearly defined learning outcomes. This empowers students to take ownership of their academic progress, fostering a sense of responsibility and deepening their engagement with the material. In most schools today, students are often passive participants, doing only what is required to meet predetermined and bare minimal academic standards. At Custom Class, we challenge students to move beyond compliance by offering a rich variety of materials, activities, and assessments designed to engage them actively and challenge them to reach their full potential.

Research consistently demonstrates that when students have greater ownership over their learning, their engagement, motivation, and academic success increase[6,7]. By giving students the autonomy to direct elements of their educational path, they are more likely to be invested in the process and put forth greater effort. Custom Class's approach tailors instruction to individual learning styles and abilities, ensuring that students develop a deeper understanding of core concepts. This personalization fosters essential life skills such as critical thinking, problem-solving, self-directed learning, and effective communication—skills that are crucial for thriving in today's rapidly changing world.

Custom Class also draws upon the key findings from John Hattie's groundbreaking meta-analysis[8] of educational influences, which underscores the importance of teacher clarity and mastery learning. According to Hattie, clear learning goals and success criteria are critical for student understanding and achievement. At Custom Class, our educators ensure that each student has a clear understanding of the intended outcomes and the steps required to achieve them. This clarity is further enhanced by providing personalized explanations, targeted feedback, and differentiated assessments.

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[5] Bloom, B. S. (1984). The 2 sigma problem: The search for methods of group instruction as effective as individual tutoring. Educational Researcher, 13(6), 3–8.
https://files.eric.ed.gov/fulltext/ED457185.pdf
[6] Benner, M., Brown, C., & Jeffery, A. (2019, August 19). Elevating student voice in education. Center for American Progress.
https://www.americanprogress.org/article/elevating-student-voice-education/
[7] Dabrowski, J., & Reed Marshall, T. (2018). Motivation and engagement in student assignments: The role of choice and relevancy. The Education Trust.
[8] Hattie, J. (2008). Visible learning: A synthesis of over 800 meta-analyses relating to achievement.
https://www.taylorfrancis.com/books/mono/10.4324/9780203887332/visible-learning-john-hattie

In line with Hattie's emphasis on mastery learning, Custom Class ensures that students are given the opportunity to fully understand and master key concepts before progressing to new material. This mastery-based approach, advocated by Benjamin Bloom, ensures that all students receive the instructional support they need to succeed. We provide opportunities for revision, practice, and reinforcement, ensuring that no student moves forward until they have demonstrated proficiency. As a result, students experience greater academic confidence, deeper learning, and long-term retention of knowledge.

Ultimately, Custom Class's educational philosophy is designed to equip students not only with academic knowledge but also with the essential life skills they need to navigate an ever-evolving world. By integrating Utah's Portrait of a Graduate competencies—including critical thinking, collaboration, adaptability, and leadership—into our curriculum and established outcomes with success criteria, we ensure that students develop holistically, preparing them for success in college, career, and life. Our focus on personalized learning, clear success criteria, and mastery-based progression offers students the tools they need to thrive as lifelong learners in a dynamic and complex future.

Utah Core Standards Instruction and Assessment:
At Custom Class, all instructional practices are designed to align with the Utah Core Standards, ensuring that students develop the academic skills required at each grade level while also acquiring essential life skills. Our approach blends clarity of success criteria, customized instructional support, and a competency-based model where students demonstrate mastery of the Utah Core Standards before progressing. This process involves actively engaging students and their families in choosing curriculum materials aligned with intended learning outcomes, allowing for a personalized education experience.

We will use a wide array of evidence-based curriculum options that align with Utah Core Standards. For elementary students, we will implement programs like Imagine Learning, Lexia, Waterford, and iReady, all of which areUSBE-recommended tools that deliver personalized learning pathways to promote proficiency in literacy and mathematics. These programs offer adaptive learning experiences that cater to individual student needs, ensuring that all learners receive the targeted support or challenges they require to achieve proficiency.

In secondary grades, students will have access to BYU Independent Study (BYU-IS) courses through Canvas, the Learning Management System (LMS) procured by Utah Education Network (UEN) for public education. These courses align with Utah Core Standards and offer students the opportunity to earn both high school and college credits, making dual enrollment and advanced learning opportunities accessible to all students. Canvas will also serve as the primary platform for tracking student progress, providing feedback, and facilitating peer collaboration, ensuring that students remain engaged and connected throughout their learning journey. Other aligned options will be considered by a committee of our educators as long as they are evidence-based and align with state standards.

To further enhance personalized learning, Custom Class will utilize artificial intelligence (AI)-powered tools that allow students to receive on-demand, individualized help. These tools

adjust to students' learning styles and interests, providing real-time assistance in areas where students may need additional support. If students require extra help to demonstrate proficiency, educators will provide targeted instruction through small group or individualized sessions, allowing for deeper dives into the content. Conversely, students who are exceeding proficiency will receive advanced challenges and enrichment activities, ensuring that they are continuously progressing.

Assessments at Custom Class will be multifaceted, combining state-mandated assessments like Utah's RISE and ACT with competency-based evaluations that measure mastery in both academic content and life skills. Formative assessments will be embedded in both synchronous and asynchronous instruction to provide ongoing, actionable feedback, enabling teachers to tailor their instructional strategies to meet individual student needs. Project-based evaluations, digital portfolios, and presentations will also be used to assess deeper learning and real-world applications, ensuring that students can demonstrate their understanding in a variety of ways while developing transferable skills.

Additionally, collaboration through discussions, peer interactions, and teacher feedback will be available to help students solidify their understanding of the Utah Core Standards. This emphasis on interaction ensures that learning is not only personalized but also reinforced through meaningful dialogue and reflective feedback.

By integrating the Portrait of a Graduate competencies into the curriculum, we ensure that students not only meet academic standards but also develop the broader skills needed for success in college, career, and life.

Research Supporting Educational Program:
The educational program at Custom Class is built on strong, evidence-based research supporting personalized, mastery-based learning. Grounded in John Hattie's research on visible learning, our approach emphasizes Teacher Clarity and the importance of providing students with clear learning goals and success criteria. Hattie's findings demonstrate that when students understand what they are expected to achieve, they are significantly more likely to succeed. The concept of Teacher Clarity, which has an effect size of 0.75 according to Hattie's research, is one of the core principles guiding our instructional design. This clarity enables students to take ownership of their learning, knowing precisely how to meet expectations and succeed academically.

In addition to Hattie's work, Thomas Guskey's research on mastery learning[9] shows that when students are allowed to progress based on demonstrated competence, they achieve higher levels of mastery and retain information more effectively compared to traditional time-based progression models. This personalized, competency-based approach ensures that each student can advance at their own pace, with tailored support when needed, resulting in deeper understanding and longer-lasting academic success.

[9] *Guskey, T. R. (2022). Implementing Mastery Learning. https://us.corwin.com/books/implementing-mastery-learning-277693*

To support these pedagogical foundations, we use rigorously evaluated programs such as Imagine Learning and Lexia, which have demonstrated success in improving literacy and numeracy outcomes[10,11], including for students from underserved backgrounds. Research on these programs shows that personalized learning pathways increase student engagement, close achievement gaps, and lead to sustained academic growth. These programs are integral to our elementary curriculum, providing a flexible, adaptive approach that meets the needs of diverse learners while aligning with the Utah Core Standards.

For secondary students, we leverage BYU-IS courses accessed through Canvas, which offer dual-enrollment opportunities. Research shows that dual-enrollment programs significantly improve college readiness by exposing students to rigorous, college-level coursework while they are still in high school. This not only enhances academic preparedness but also reduces the cost and time required for post-secondary education. By offering these courses, Custom Class enables students to graduate with both high school credentials and college credits, preparing them for success in their future academic and professional endeavors.

Custom Class teachers will also play a pivotal role in developing curriculum aligned with Utah's Portrait of a Graduate and Utah Core Standards. Educators will begin by crafting learning goals and success criteria, drawing from Hattie's findings on the impact of Teacher Clarity on student outcomes. They will curate learning materials and assessment options to meet these goals, ensuring flexibility so that students can choose to demonstrate their proficiency through multiple pathways. The curriculum choices will offer a variety of evidence-based options, allowing families to select the learning tools that best support their child's success, while ensuring alignment with our educational goals.

This combination of personalized learning, mastery-based progression, and flexible curriculum options forms the foundation of our educational program, ensuring that students not only achieve academic success but also develop the critical life skills outlined in Utah's Portrait of a Graduate.

Meaningful, Manageable, and Measurable Educational Priorities:
At Custom Class, we ensure that our educational priorities are meaningful, manageable, and measurable by fully aligning them with our mission and vision. Our focus on personalized, competency-based learning allows for outcomes that are both student-centered and relevant to their individual educational journeys. Success criteria for each grade level and learning objective are clearly established, providing students, teachers, and families with a clear roadmap to measure progress toward mastery. These criteria are designed to be manageable by being fully integrated into our LMS, which enables real-time tracking of progress and timely interventions whenever necessary.

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[10] Elliott, Scott. "An Evaluation of the Effectiveness of Imagine Learning ..." *AN EVALUATION OF THE EFFECTIVENESS OF IMAGINE LEARNING*, SEG Measurement Sept 2018,, files.eric.ed.gov/fulltext/ED595363.pdf.

[11] "Lexia Learning's Literacy Suite Proven Strongly Effective across Elementary and Secondary Grades." *GlobeNewswire News Room*, Lexia Learning, 13 July 2020, www.globenewswire.com/en/news-release/2020/07/13/2061267/0/en/Lexia-Learning-s-Literacy-Suite-Proven-Strongly-Effective-Across-Elementary-and-Secondary-Grades.html.

Our educational priorities go beyond just academic standards; they also include the development of the Portrait of a Graduate competencies, which focus on critical life skills such as communication, creativity, and collaboration. These essential skills are measurable through real-world applications, project-based learning, and student portfolios. In doing so, we ensure that students are not only meeting academic benchmarks but are also equipped with the skills needed to thrive in the future workforce.

In addition to the Utah Core Standards, our educational priorities encompass indicators of career or college readiness, such as achieving one of the following: earning 15+ college credit hours, obtaining an industry-accepted certification, completing a professional internship with a prospective employer, or creating a well-designed business of their own. These career and college readiness goals make our educational outcomes meaningful as they directly prepare students for success beyond high school.

By embedding these priorities into our LMS, we make the learning experience manageable and accessible, allowing students to take ownership of their academic journey. Teachers and families can monitor progress continuously, ensuring that each student's learning is on track and aligned with both Utah's Core Standards and the Portrait of a Graduate competencies. This approach ensures that every student has the opportunity to succeed in both academic and life pursuits.

Complete and Coherent Educational Program:
Custom Class's educational program is designed to be flexible, personalized, and rigorous, ensuring that every student meets academic standards while also developing essential life skills. At the core of our program is a mastery-based learning model, which allows students to progress at their own pace, mastering concepts before moving forward. This approach is aligned with the Utah Core Standards and focuses not only on academic success but also on the broader competencies outlined in Utah's Portrait of a Graduate.

Elementary Curriculum:
For elementary students, our program offers a selection of evidence-based, USBE-recommended curriculum options that are tailored to meet individual learning needs. Full curricula and supplemental tools that best meet their needs will be offered to families. We will utilize tools such as EL Education, Lexia, Waterford, iReady, and Imagine Learning—programs that have been evaluated and endorsed for their ability to improve literacy and math outcomes. These programs, referenced in Utah's Curriculum Guidance document created after the passage of SB 127, provide personalized learning paths that allow students to work at their own pace, giving them the opportunity to receive targeted interventions or enrichment activities based on their progress.

Each of these programs is grounded in research and offers adaptive learning technology to monitor student progress in real time. By continually assessing students' performance, the curriculum adjusts the level of instruction to ensure students are working within their zone of proximal development, promoting growth and mastery at an individualized pace. This ensures that every student, regardless of their starting point, receives the support they need to achieve

proficiency in core literacy and numeracy skills, which are foundational for their long-term academic success.

Secondary Curriculum:
For secondary students, BYU-IS courses, as procured by UEN for public education in Utah, will form a significant part of the curriculum. These courses are aligned with Utah Core Standards and cover a wide range of subjects, from mathematics and science to humanities and career-focused electives. Students will have access to dual-enrollment opportunities through BYU-IS, allowing them to earn college credits while still in high school. This not only helps them get a head start on their post-secondary education but also reduces the financial burden of college by enabling them to earn credits at no extra cost during high school.

Secondary students will also engage in career exploration through a variety of hands-on opportunities, such as internships, job shadowing, and mentorships. By providing real-world experiences, we ensure that students graduate not only with strong academic credentials but also with practical skills that will help them transition seamlessly into the workforce or higher education. These opportunities will be aligned with each student's individual interests and career goals, making the learning experience more relevant and meaningful.

Flexible Learning Paths and Success Criteria:
Custom Class embraces a curriculum-agnostic approach to education, where teacher-created success criteria form the backbone of instructional delivery. These success criteria are developed based on Utah Core Standards and Portrait of a Graduate competencies, providing clear and measurable goals for students to achieve. What sets our program apart is its flexibility: students and their families can choose from a variety of learning pathways, including traditional textbooks, digital tools, and other educational resources, all while adhering to the same high academic standards.

Our LMS, Canvas, will be used to track student progress in real-time, ensuring that both teachers and students have access to data that allows for immediate interventions or accelerated learning when needed. Teachers will use this system to offer personalized feedback and to create assignments and assessments that align with the individualized success criteria, ensuring that each student's learning experience is tailored to their strengths, needs, and interests.

Assessment and Mastery Learning:
At Custom Class, we believe that assessment should be an ongoing, formative process that helps students grow and succeed. We will use a combination of traditional and innovative assessment methods, including project-based learning, digital portfolios, and competency-based evaluations. This diverse range of assessments ensures that students can demonstrate their understanding and mastery of concepts in ways that best reflect their learning styles.

For elementary students, assessments will be embedded within programs like Lexia, Waterford, iReady, and Imagine Learning, allowing for continuous monitoring of student progress. For

secondary students, BYU-IS courses will include both formative and summative assessments, ensuring that students are mastering the content and preparing for college-level expectations.

In addition to core academic assessments, we will focus on measuring student growth in the Portrait of a Graduate competencies. These include critical life skills such as communication, collaboration, creativity, and critical thinking. Students will be required to demonstrate their proficiency in these areas through real-world applications, group projects, and presentations, ensuring that their learning is both meaningful and measurable. Success in these competencies will be critical to preparing students for the challenges of the 21st-century workforce and higher education.

Preparing for College and Career:
Our educational program also prioritizes career and college readiness. Students will be expected to meet one of several indicators of readiness before graduation, such as earning at least 15 college credits, completing an industry-recognized certification, participating in a professional internship, or creating a well-designed business of their own. These markers of success ensure that our graduates leave Custom Class with not only the academic skills but also the practical experiences needed to thrive in their future careers.

By integrating flexible curriculum options, rigorous academic standards, and real-world applications, Custom Class ensures that every student is fully equipped to succeed in college, career, and life. Through personalized learning, continuous feedback, and competency-based progression, we provide a complete and coherent educational program that meets the diverse needs of our student body while preparing them for the demands of the future.

Criteria for Promotion and Graduation:
At Custom Class, promotion to the next grade level and graduation from high school will be based on students' demonstrated mastery of Utah Core Standards and the competencies outlined in Utah's Portrait of a Graduate. We prioritize a competency-based model, ensuring that students move forward when they have achieved proficiency in the essential academic and life skills required for success. This model is designed to give students the flexibility to progress at their own pace, allowing for deeper understanding and mastery of content.

Promotion Criteria:
For elementary and middle school students, promotion to the next grade level will be determined by competency-based assessments. Students will need to demonstrate proficiency in core academic areas, such as literacy and mathematics, as well as key competencies like critical thinking, problem-solving, and collaboration. These competencies are measured through a combination of:

- **Formative assessments**: Ongoing assessments will allow teachers to gauge students' understanding throughout the school year. These assessments provide regular feedback to both students and teachers, enabling adjustments to instruction as needed.
- **Project-based evaluations**: Students will engage in hands-on, real-world projects that require the application of knowledge and skills in various contexts. These projects will

allow students to demonstrate mastery in creative and practical ways, reinforcing their understanding of the material.
- **Digital portfolios**: Students will compile portfolios of their work that showcase their progress and mastery over time. These portfolios will include samples of student work, reflections on their learning, and evidence of competency in both academic and life skills.

Students who demonstrate proficiency in these areas will be promoted to the next grade. Those who need additional time or support to achieve proficiency will receive targeted interventions, such as tutoring, small-group instruction, or additional time to complete projects and assessments.

Academic Requirements:

Elementary School Core Curriculum: Grades K-6
- Reading/Language Arts;
- Mathematics;
- Science;
- Social Studies;
- Visual & Performing Arts;
- Health Education;
- Physical Education;
- Educational Technology; and
- Library Media.

Middle School Core Curriculum: Grades 7-8
- Grade 7 Language Arts;
- Grade 8 Language Arts;
- Grade 7 Mathematics;
- Grade 8 Mathematics;
- Grade 7 Integrated Science;
- Grade 8 Integrated Science;
- United States History;
- Utah History; and

At least one course in each of the following in grades 7 or 8: Health Education; College and Career Awareness; Digital Literacy; the Arts; or Physical Education.

High School: Grades 9-12
Custom Class's graduation requirements include those required by the State of Utah, such as:

- English/Language Arts (4 Credits)
- Mathematics (3 Credits):
    - Successful completion of Secondary Mathematics I, II, and III or higher.
    - Parents may request that students replace Secondary III with a course from the Applied or Advanced approved course list.

    - Students who successfully complete Calculus have met graduation requirements regardless of the number of credits they have taken.
- Science (3 Credits):
    - 2 Credits (from the four science foundation areas; Earth Systems, Biological Science, Chemistry, AP Computer Science, or Physics).1 Credit (from the foundation courses or the applied or advanced science core list).
- Social Studies (3 Credits):
    - 1 Credit (United States History)
    - 0.5 Credit (Geography)
    - 0.5 Credit (Civilization)
    - 0.5 Credit (United States Government and Citizenship)
    - 0.5 Credit (LEA) Discretion)
- Directed Coursework (3.5 Credits):
    - 1.5 Credit (Fine Arts)
    - 1 Credit (Career and Technical Education (CTE))
    - 0.5 Credit (Digital Studies)
    - 0.5 General Financial Literacy
- Physical Education Health (2 Credits):
    - 0.5 Credit (Health)
    - 0.5 Credit (Participation Skills)
    - 0.5 Credit (Fitness for Life)
    - 0.5 Credit (Individualized Lifetime Activities)
- Electives (5.5 Credits)
- Total of 24 Credits
- Graduation requirements may be adjusted for individual students to ensure an appropriate path to success when such adjustments:
    - Align with the student's Individualized Education Plan (IEP) or Student Education Occupation Plan (SEOP), or both;
    - Are documented in the student's file, with the parent's or guardian's signature included; and
    - Uphold the academic integrity and rigor expected for high school graduation, as determined by the Board.
- High school students, together with at least one parent or guardian will meet with a school counselor to develop a graduation plan that aligns with post-high school goals. Students intending to apply to a four-year college or university directly from high school will receive guidance on additional or specific courses to take during grades 9-12.
- Courses required for graduation can be retaken in accordance with the Utah Office of

Administrative Rule R277-717: High School Course Grading Requirements

Additional and Unique High School Graduation Requirements:
At the high school level, students must meet more comprehensive requirements for graduation. These requirements are designed to ensure that students are not only proficient in academic subjects but also prepared for college and career success. To graduate, students must demonstrate mastery in the following areas:

1. **Core Academic Subjects**: Students will be required to demonstrate proficiency in the Utah Core Standards for core subjects, including English, mathematics, science, and social studies. These subjects will be assessed through a combination of formative and summative assessments, project-based evaluations, and state-mandated exams like the ACT and RISE assessments. Students will be required to demonstrate competency and earn credit in each of the 24 required credit areas listed above and on USBE's website.
2. **College and Career Readiness Indicators**: In addition to academic mastery, students must complete at least one of the following college or career readiness indicators:
    - **Earning 15+ college credits**: Through dual-enrollment opportunities, students can earn college credits while still in high school. These credits not only prepare students for post-secondary education but also reduce the cost and time required to complete a college degree.
    - **Obtaining an industry-recognized certification**: Students can pursue certifications in fields like technology, healthcare, or business, providing them with tangible skills and credentials that make them more competitive in the workforce.
    - **Completing a professional internship**: Through partnerships with local businesses and organizations, students will have the opportunity to gain real-world experience in their field of interest. Internships allow students to apply their academic knowledge in professional settings, developing skills that will serve them in future careers.
    - **Creating a business**:
      Students interested in entrepreneurship can develop and execute their own business plan. This experience will help students develop critical skills such as leadership, financial literacy, and strategic planning, preparing them for the possibility of starting their own businesses or pursuing entrepreneurial ventures after graduation.
    - **Demonstrate competency in 9-12 grade indicators of Portrait of a Graduate.** Students can also meet college and career readiness indicators by demonstrating proficiency in the 9-12 Grade Band competencies of the Utah Portrait of a Graduate. These competencies include critical thinking, communication, collaboration, adaptability, and innovation—all of which are vital for success in the modern workforce and post-secondary education. Students will have multiple opportunities to demonstrate their mastery of these competencies through project-based assessments, presentations, internships, or entrepreneurial endeavors.

These college and career readiness indicators are designed to give students meaningful experiences that extend beyond traditional academic work. By completing one or more of these indicators, students will leave Custom Class with both academic credentials and practical skills that will serve them well in their future endeavors.

Additional Support for Students:
At Custom Class, we recognize that students learn at different paces and may require additional

support to achieve proficiency. Students who need to build background knowledge and master prerequisite skills will be supported by offering customized instruction while at the same time offering grade level appropriate materials and instruction that meets state standards for assessment and progression, ensuring all students are adequately prepared for testing requirements.To ensure that all students have the opportunity to succeed, we offer a variety of resources both online and through our Family Service Centers. These centers provide tutoring, coaching, and access to additional learning materials that are hands-on, ensuring that students receive the individualized support needed to meet their academic goals.

For students who need more time to demonstrate mastery, we will offer extended learning opportunities, including:

- **One-on-one tutoring** with certified educators to target specific areas of need.
- **Small-group instruction** for students who require a collaborative learning environment.
- **Online resources** to provide additional practice and reinforcement in core academic areas.
- **After-school programs** and **weekend workshops** focused on specific competencies or skills.

Teachers will regularly monitor student progress through the LMS, ensuring that students receive timely interventions when needed. By integrating support services with our instructional program, we ensure that all students have access to the tools and resources necessary to achieve academic success.

Flexibility in Pathways:
One of the key advantages of our educational model is its flexibility. Students and their families can customize learning pathways, selecting curriculum materials and instructional methods that best suit their individual needs and interests. However, regardless of the chosen pathway, the success criteria for each grade level and graduation requirement remain the same. This ensures that every student, whether following a traditional or non-traditional route, will meet the rigorous academic standards set forth by Utah Core Standards and the Portrait of a Graduate competencies.

By offering a wide range of learning options, personalized support, and clear success criteria, we can provide a complete and coherent educational program that prepares students not only for academic success but also for life beyond the classroom.

Alignment of Instruction with Mission and Vision:
The instructional model at Custom Class is meticulously crafted to reflect and advance our mission of empowering students through personalized, flexible, and mastery-based learning. At the core of this approach is the belief that every student deserves an educational experience that is tailored to their unique needs, strengths, and interests, while ensuring that all learners meet rigorous academic standards. This approach is fundamental to our vision of creating a learning environment that fosters not only academic excellence but also the development of essential life skills, preparing students to thrive in college, careers, and life.

Personalization and Mastery-Based Progression:
A central element of our instructional model is personalization. Each student at Custom Class is viewed as an individual with distinct learning needs and aspirations. Our model allows students to progress at their own pace through mastery-based learning, ensuring that they fully understand and can apply key concepts before moving on to more complex material. This personalized learning environment is designed to empower students by giving them control over their educational journey, promoting student agency and a sense of ownership over their learning outcomes.

Our emphasis on mastery-based progression ensures that no student is left behind or pushed forward without having developed a deep understanding of the subject matter. Whether through traditional assessments, project-based evaluations, or real-world applications, students demonstrate their understanding in ways that are meaningful to them. This approach directly aligns with our mission of empowerment, as students are given the tools and flexibility to achieve success in their own way.

Student Choice and Multiple Pathways:
In line with our vision of fostering academic and personal growth, Custom Class provides students with multiple pathways to demonstrate their mastery of academic content and essential skills. By offering a wide range of options—such as traditional assessments, digital portfolios, real-world projects, and competency-based evaluations—we ensure that students are not confined to a one-size-fits-all model. Instead, they can choose the methods of assessment that best suit their learning styles and strengths.

This focus on student choice is critical to our instructional model. Research shows that when students are given the autonomy to make decisions about how they learn and demonstrate their knowledge, they are more engaged, motivated, and likely to succeed. Custom Class encourages students to take an active role in their education by allowing them to shape their learning pathways, choose their instructional resources, and set personal learning goals in collaboration with teachers and families. This flexibility fosters intrinsic motivation, helping students develop a lifelong love for learning.

Alignment with Utah Core Standards and Portrait of a Graduate:
Custom Class ensures that our instructional practices are aligned with both the Utah Core Standards and the competencies outlined in Utah's Portrait of a Graduate. While students have multiple pathways to demonstrate their learning, the rigor and high standards remain consistent across all options. Our instructional strategies are designed to help students achieve proficiency in core academic subjects, while also developing critical life skills such as communication, collaboration, critical thinking, and adaptability.

Our alignment with the Portrait of a Graduate competencies is especially important as we prepare students for life beyond the classroom. By integrating these competencies into our instructional model, we ensure that students not only meet academic benchmarks but also develop the essential skills needed to succeed in the 21st century workforce. Whether through collaborative group projects, presentations, or community-based internships, students are

constantly challenged to apply their learning in real-world contexts, preparing them for the complex challenges they will face in their future careers and personal lives.

Flexible Learning Environments:
Custom Class's instructional model is designed to accommodate diverse learning environments, further supporting our mission of personalized learning. Whether students prefer to learn through online platforms, or in blended environments, our instructional design adapts to their needs. This flexibility extends to our use of technology, where students can leverage tools such as artificial intelligence, online resources, and interactive digital tools to enhance their learning experience.

By utilizing a LMS, we provide students with continuous access to their learning materials, progress reports, and teacher feedback, ensuring that their educational experience is both transparent and engaging. Teachers can tailor instruction and assignments in real time, providing immediate interventions or enrichment activities based on student progress. This adaptability makes learning more manageable for both students and educators, aligning directly with our mission to create a dynamic and supportive educational environment.

Real-World Applications and Project-Based Learning:
Custom Class's instructional model is also heavily focused on project-based learning and real-world applications, ensuring that students have the opportunity to apply what they have learned in practical, meaningful ways. This aligns with our vision of fostering personal growth by preparing students for real-world challenges. Students engage in projects that require them to use critical thinking, problem-solving, and collaboration—skills that are essential for success in both college and careers.

For example, students might participate in community service projects, internships, or entrepreneurial endeavors, all of which allow them to put their knowledge into practice. These experiences not only reinforce academic content but also provide students with a deeper understanding of how their learning connects to real-world issues and opportunities. This hands-on, experiential learning approach ensures that students leave Custom Class with both the academic credentials and the life skills needed to thrive in the modern world.

Holistic Development:
In addition to academic achievement, Custom Class is deeply committed to the holistic development of each student. Our instructional practices are designed to support students' emotional, social, and personal growth alongside their academic progress. We prioritize well-being, mindset development, and resilience, ensuring that students are not only prepared for academic success but also for the complexities of life. By creating a nurturing and inclusive learning environment, we help students build the confidence and self-awareness they need to pursue their goals and contribute meaningfully to their communities.

The instructional model at Custom Class is intricately aligned with our mission of empowering students and our vision of fostering both academic excellence and personal growth. By providing personalized learning pathways, fostering student agency, and offering a

mastery-based progression model, we ensure that every student is equipped with the knowledge, skills, and competencies necessary for success in both academia and life.

Research Supporting Positive Student Outcomes:
The mastery-based instructional approach at Custom Class is built upon a foundation of extensive educational research, which consistently highlights the effectiveness of personalized, competency-based learning in driving student success. Our approach aligns with the influential work of Thomas Guskey and other educational thought leaders who have demonstrated that when students are allowed to advance based on demonstrated competence rather than time spent in class, they achieve higher levels of understanding, retention, and engagement. Mastery learning ensures that no student moves on to more complex material until they have a solid grasp of the foundational concepts, leading to deeper learning and stronger academic outcomes.

Guskey's Mastery Learning Model:
Guskey's research has long supported the notion that mastery learning can help students achieve greater levels of understanding by focusing on individual progress. In traditional time-based models, students are often pushed through a curriculum regardless of their level of proficiency, leaving gaps in understanding. Guskey's model emphasizes the importance of flexible pacing, where students receive additional support until they master a concept, thus eliminating gaps in learning before advancing. This has been shown to lead to higher student achievement across various grade levels and subject areas.

Custom Class's mastery-based learning approach directly incorporates this model by ensuring that students are assessed on their competence, and only advance when they have demonstrated proficiency in the required skills and knowledge. This allows for more personalized interventions and provides targeted support to students who need additional time or resources, ensuring that they can succeed without falling behind their peers.

Personalized Learning Pathways:
Our use of personalized learning pathways is another essential component of the Custom Class instructional model, which has been proven to enhance student engagement and improve academic outcomes. Programs like Imagine Learning and Lexia—both of which are evidence-based and widely used to support literacy and numeracy—offer highly personalized, adaptive learning experiences that cater to each student's unique needs, strengths, and areas for growth. These programs are particularly effective in closing achievement gaps, as they allow students to work at their own pace while providing them with the necessary scaffolding to build upon their knowledge.

Numerous studies have demonstrated the positive impact of programs like Imagine Learning and Lexia on underserved and educationally disadvantaged populations, making them crucial tools in our effort to promote equity in education. Research indicates that personalized learning programs increase student motivation and self-efficacy, which in turn leads to sustained academic growth. By offering students the opportunity to engage with learning material that is

tailored to their learning styles and progress, Custom Class fosters a more inclusive and effective learning environment for all students.

Impact of Personalized Learning on Engagement and Achievement:
The impact of personalized learning on student engagement is particularly well-documented. According to research from the Bill & Melinda Gates Foundation, students in personalized learning environments, such as those fostered by Imagine Learning and Lexia, demonstrate higher levels of academic growth compared to their peers in traditional settings. The flexibility of personalized learning allows students to engage with material that is at their appropriate level of challenge, helping to keep them motivated and actively engaged in their education. This approach is especially beneficial for students who may have struggled in more rigid, one-size-fits-all educational environments, as it offers them multiple avenues for success.

Additionally, Hattie's Visible Learning research has shown that clear success criteria and teacher clarity, both key elements of the Custom Class instructional model, have some of the largest impacts on student achievement. By providing students with clear goals and a roadmap for success, Custom Class ensures that students understand exactly what is expected of them and how they can achieve mastery. This clarity reduces confusion, builds student confidence, and fosters a growth mindset, which further contributes to their academic progress.

Bridging the Gap with Career and College Readiness:
The research-backed personalized learning pathways at Custom Class not only support academic achievement but also play a pivotal role in developing critical life skills and preparing students for future success. By offering multiple ways for students to demonstrate their mastery—through traditional assessments, project-based evaluations, and real-world applications—we ensure that our learners are not just meeting academic benchmarks but also developing the skills necessary for life beyond school.

The inclusion of dual-enrollment opportunities and career exploration activities, such as internships, mentorships, and job-shadowing, aligns with research showing that students who participate in work-based learning are more likely to graduate high school and succeed in post-secondary education and careers. For instance, a study by the American Institutes for Research found that students who engage in career and technical education (CTE) programs have higher graduation rates and improved outcomes in both academic and career measures[12]. The same research highlights that CTE students are more likely to enroll in college, particularly when they have participated in dual-enrollment courses during high school[13].

Custom Class's focus on offering real-world applications of academic learning designed to promote college and career readiness in all students. By enabling high school students to earn college credits, obtain industry certifications, or participate in entrepreneurial projects, we are preparing them for a future where academic credentials and practical skills are equally valued.

[12]American Institutes for Research: The Lasting Benefits & Strong Returns of Early College High Schools https://www.air.org/sites/default/files/downloads/report/Lasting-Benefits-Early-College-High-Schools-Brief-Feb-2020.pdf
[13] The Community College Research Center: What Happens to Students Who Take Community College "Dual Enrollment" Courses in High School?
https://ccrc.tc.columbia.edu/media/k2/attachments/what-happens-community-college-dual-enrollment-students.pdf

Rigorous Standards and Holistic Development:
The flexibility of Custom Class's instructional model is balanced by the rigorous standards set by our educators. While students are given the freedom to choose their learning pathways, they must still meet the same high expectations in terms of mastering the Utah Core Standards and the competencies outlined in the Portrait of a Graduate. By incorporating project-based learning, formative assessments, and digital portfolios, we ensure that student progress is measurable and transparent, providing opportunities for ongoing reflection and improvement.

Furthermore, our instructional approach supports the holistic development of students, helping them cultivate skills like critical thinking, collaboration, creativity, and adaptability—all of which are essential for success in today's rapidly changing world. These life skills are integrated into the curriculum through hands-on projects, group work, and real-world applications, ensuring that students develop both academic proficiency and the soft skills required for the future workforce.

The mastery-based learning and personalized pathways offered at Custom Class are supported by a wealth of research, showing that when students are provided with clear goals, opportunities for personalized learning, and multiple ways to demonstrate their understanding, they achieve greater academic success and are better prepared for the challenges of the future. By integrating programs like Imagine Learning, Lexia, and BYU-IS, we ensure that every student has access to the resources and support they need to thrive, whether they are working toward college, a career, or personal growth. This research-backed approach ensures that Custom Class continues to deliver positive student outcomes while nurturing lifelong learners ready to make meaningful contributions to society.

Methods of Assessing Student Outcomes:
At Custom Class, we believe that a comprehensive approach to assessment is essential to accurately measure student learning and development. To that end, we employ a multifaceted assessment model that includes state-mandated standardized tests, competency-based evaluations, and real-world applications. This ensures that we capture both the academic growth and the development of critical life skills outlined in Utah's Portrait of a Graduate.

Custom Class will administer state-mandated assessments, including the Acadience and RISE tests for elementary and middle school students and the Aspire and ACT for high school students. These assessments are essential for measuring students' proficiency in core academic subjects such as English language arts, mathematics, and science. Statewide assessments allow us to gauge academic progress against Utah's Core Standards and ensure that our students are meeting or exceeding statewide benchmarks. These scores also help inform both teachers and parents about student readiness for subsequent grade levels and post-secondary opportunities.

In addition to standardized tests, Custom Class will utilize competency-based evaluations to assess students' mastery of specific academic and life skills. Unlike traditional models that rely on seat time and grades, our approach allows students to advance only after demonstrating proficiency in essential skills and concepts. Competency-based assessments can take many forms, including performance tasks, demonstrations, and portfolios that showcase student

learning over time. These assessments focus on students' ability to apply what they have learned in practical and meaningful ways, promoting deeper learning and retention. By ensuring that students must demonstrate competency before advancing, we guarantee that no student moves forward with significant learning gaps.

To assess the development of critical life skills, Custom Class will employ project-based assessments and real-world applications of student knowledge. These assessments go beyond traditional testing methods, allowing students to work on long-term projects, solve real-world problems, and collaborate with peers. For example, a student might take on the task of designing a sustainable community as part of a social studies unit or creating a small business plan for an entrepreneurial project. Such tasks are evaluated using teacher-created documents that outline the success criteria for both academic and life skills mastery. These projects help students develop key competencies such as critical thinking, problem-solving, communication, and collaboration—all essential components of Utah's Portrait of a Graduate.

Our LMS, Canvas, will play a critical role in tracking student progress and providing real-time data on academic performance. Through Canvas, both students and teachers can monitor ongoing performance and identify areas for improvement. Teachers will regularly use formative assessments to gauge student understanding during lessons, providing timely feedback that informs both instruction and student progress. The platform also facilitates peer collaboration and allows students to submit assignments, receive grades, and access teacher feedback seamlessly. This integration of technology ensures that students are constantly aware of their progress and have access to support when needed.

At Custom Class, formative assessments will be used consistently throughout the year to offer ongoing feedback on student learning. These include quizzes, reflections, exit tickets, and informal check-ins, all of which help teachers make immediate instructional adjustments to meet student needs. The goal of formative assessments is not only to evaluate student progress but also to guide learning by identifying where additional support or challenges may be necessary. For example, if a student demonstrates gaps in understanding through a formative assessment, teachers can provide targeted interventions before moving on to more complex topics.

Summative assessments, on the other hand, will provide a comprehensive evaluation of what students have learned at the end of a unit, course, or academic year. These assessments include cumulative projects, and portfolios that reflect the student's journey toward mastering key competencies. Summative assessments allow us to assess overall mastery and inform promotion or graduation decisions.

We also emphasize student self-assessment as a vital component of our assessment strategy. Students will be encouraged to reflect on their progress regularly, using tools such as reflection journals, goal-setting activities, and peer feedback. Self-assessment fosters a sense of ownership over learning and helps students develop metacognitive skills, such as understanding their strengths and areas for growth. By engaging in this reflective process, students are empowered to take responsibility for their learning journey and make informed decisions about how to achieve their academic and personal goals.

Digital portfolios will serve as an important tool for tracking student progress over time. These portfolios will house student work, including written assignments, projects, and reflections, allowing both students and teachers to monitor growth across different subjects and competencies. The portfolios also provide a tangible way for students to showcase their achievements to parents, teachers, and potential employers or colleges. By compiling their best work, students will have a clear record of their accomplishments, helping them to set future goals and reflect on their academic journey.

Teachers and students will benefit from real-time progress monitoring through our LMS and other digital tools. This allows for ongoing feedback loops, where teachers can instantly assess student performance and make data-driven decisions to inform instruction. If students are falling behind, additional support, such as tutoring or one-on-one coaching, will be provided to help them catch up and succeed.

In summary, the methods of assessing student outcomes at Custom Class are comprehensive, flexible, and aligned with our educational philosophy of personalized, mastery-based learning. By combining state-mandated assessments, competency-based evaluations, formative feedback, and project-based assessments, we ensure that our students are not only meeting academic benchmarks but are also developing the critical life skills necessary for success in today's rapidly changing world.

Meeting the Needs of Students with Disabilities:
Custom Class provides an inclusive and equitable educational experience for students with disabilities, ensuring compliance with the Individuals with Disabilities Education Act (IDEA). Each student with disabilities will have a customized learning plan, including Individualized Education Plans (IEPs) and 504 plans, tailored to meet their unique needs. These plans will be developed in close collaboration with parents/guardians, IEP teams, and special education professionals, with an emphasis on making the learning environment both accessible and effective for each student.

Online schools can be a restrictive environment for students with disabilities, limiting their interactions with other people, such as students and staff. At Custom Class, our students have support and structure for working alongside their peers at our family service centers with the care of our staff. Opportunities for day camps, workshops, and work-based learning organized in collaboration with our Community Liaisons and Teachers will provide students with disabilities even more opportunities to interact with their peers and learn social and emotional skills they would otherwise miss. Students with disabilities who choose Custom Class will find one of the least restrictive hybrid online environments available to them in the state of Utah.

To ensure full participation in the online environment, our Special Education team will work closely with general education teachers to provide accommodations and modifications, such as the use of assistive technologies (*e.g.*, screen readers, text-to-speech software, and captioning), extended time on assessments, and personalized instructional materials. These accommodations will help students access the curriculum, demonstrate their learning, and engage meaningfully with the educational content.

In addition to general education accommodations, Custom Class will offer students access to our Family Service Centers, where they can receive further support, including tutoring, academic coaching, and one-on-one instruction. These services will be available both online, at in person facilities and through local partners to ensure that students with disabilities receive the full range of resources necessary to succeed in a digital learning environment. Frequent progress monitoring and collaborative reviews with IEP teams will ensure that the plans remain relevant, effective, and adaptable to changing needs.

Custom Class places Universal Design for Learning (UDL)[14] at the center of its educational approach, ensuring that learning is accessible for all students, including those with disabilities. UDL principles guide our efforts to create a flexible learning environment that accommodates individual differences in how students engage with content, process information, and demonstrate understanding. By offering multiple means of representation, such as text, audio, video, and graphic organizers, we ensure that students can access information in a way that best suits their learning style.

Through UDL, we also provide multiple means of engagement, incorporating interactive tools and activities, such as simulations and gamification, to engage students with the content in a personalized and meaningful way. By allowing students to demonstrate their learning through a variety of formats—written work, multimedia presentations, or performance-based assessments—we foster an environment that respects individual strengths and preferences, helping each student reach their fullest potential.

Supporting Educationally Disadvantaged Students:
Custom Class is deeply committed to addressing the needs of students from educationally disadvantaged backgrounds, including low-income families, migrant students, and Multilingual Learners (MLLs). Recognizing the barriers these students face; we aim to provide personalized learning plans and ensure equal access to educational resources.

We will implement Structured Language Instruction (SLI)[15] and the Sheltered Instruction Observation Protocol (SIOP)[16] to provide explicit vocabulary, grammar, and language function instruction for MLLs. Teachers will receive specialized training in culturally responsive teaching to ensure that students from diverse backgrounds feel valued and supported in their learning journey. Graphic organizers, visual aids, and scaffolded instruction will be incorporated into lessons to enhance understanding and academic progress for students from diverse language backgrounds.

We are also committed to bridging the digital divide by offering access to technology programs that provide students with laptops or tablets and mobile hotspots for internet connectivity. Family engagement programs will provide additional support to ensure that parents or guardians can partner with the school to assist their children in accessing the curriculum. Our tutoring and

[14] "The UDL Guidelines." *UDL*, 14 May 2024, udlguidelines.cast.org
[15] "The 3 Principles of Structured Literacy Instruction." *Lexia*, 5 Oct. 2023, www.lexialearning.com/blog/the-3-principles-of-structured-literacy-instruction
[16] SIOP - Learn about SIOP, www.cal.org/siop/about/

mentoring programs will offer students the extra help they need to overcome academic challenges and ensure their success in our online learning environment.

In addition, Custom Class integrates social-emotional learning (SEL) into its curriculum to address the challenges students from economically disadvantaged backgrounds may face. We prioritize the development of coping mechanisms, stress management techniques, and a positive learning mindset through SEL activities. This aligns with Utah's Portrait of a Graduate competencies, ensuring that students not only achieve academic success but also develop life skills critical to their overall well-being.

Curriculum Selection and Development:
At Custom Class, we offer a range of curriculum options that align with the Utah Core Standards and Portrait of a Graduate competencies. Our focus is on mastery learning, with an emphasis on personalized instruction that meets the unique needs of every student. In elementary grades, we will utilize evidence-based programs such as EL Education, Lexia, Waterford, iReady, and Imagine Learning, all of which are approved by the USBE as outlined in the Curriculum Guidance document following the passage of SB 127. These programs offer personalized learning paths, providing students with the support they need to develop literacy and mathematics proficiency at their own pace.

In secondary grades, students will have access to BYU-IS courses, which are procured by UEN and align with the Utah Core Standards. These courses offer dual-enrollment opportunities, allowing students to earn both high school and college credits. Custom Class also provides a flexible approach to curriculum delivery through our Canvas LMS, which offers curriculum-agnostic success criteria to ensure that all students achieve the same high standards, regardless of the resources or pathways they choose.

Teachers will be instrumental in curating open educational resources that support students' personalized learning experiences while ensuring alignment with Utah Core Standards. This curriculum flexibility enables students to pursue their own interests while meeting rigorous academic standards, ensuring that each student reaches mastery in both academic subjects and life skills.

Distance, Career, and College Education Components:
As a fully online school, Custom Class will deliver instruction through a blend of synchronous and asynchronous formats, allowing students to progress at their own pace. Our distance learning model emphasizes personalized support from teachers and access to a rich array of curriculum options that align with the Utah Core Standards. Students will engage in interactive online classrooms, participate in live lessons, and access digital resources through our LMS.

Custom Class is committed to preparing students for success in both higher education and the workforce through a robust Career and Technology Education (CTE) program. Our CTE initiatives are designed to provide students with the skills, experiences, and credentials they need to thrive in a rapidly evolving job market. We believe that hands-on, experiential learning is key to developing career-ready individuals who can adapt to various industries and challenges.

The rationale for offering career education is grounded in our mission to equip students not only with academic knowledge but with practical skills that will empower them to pursue meaningful careers or further education after high school.

Rationale for Career and Technology Education:
The demand for a skilled workforce has never been higher, and we recognize the need for students to be prepared with relevant technical skills, career knowledge, and post-secondary readiness. Our CTE program bridges the gap between academic learning and real-world application, helping students understand the practical implications of their studies in fields such as technology, engineering, design, business, and health sciences. By offering career-focused education, we aim to engage students with varying interests and abilities, helping them find a career path that suits their strengths and aspirations. Career education at Custom Class will empower students to make informed decisions about their future and explore multiple career pathways before graduation. With development of Portrait of a Graduate skills, students will be prepared to take these transferable skill sets with them wherever they go and into whichever career they choose.

Partnerships with Post-Secondary Institutions and Businesses:
To provide a rich array of career exploration opportunities, Custom Class will continue to establish partnerships with local and out-of-state post-secondary institutions and businesses. These institutions will help facilitate dual enrollment programs, enabling students to earn college credits while still in high school, thereby reducing the cost of post-secondary education and accelerating their career goals.

In addition to post-secondary partners, we will develop relationships with local businesses, industries, and employers. These business partnerships will offer students hands-on experience through internships, job shadowing, and mentorship programs. Local businesses and professionals will also provide mentorship and guidance to students interested in fields such as technology, healthcare, business, and trades. By connecting students with industry leaders, we give them real-world insight into the skills, work ethic, and qualifications needed to succeed in their chosen career paths.

Transition to the Workplace and Continued Education:
We are committed to ensuring that students are well-prepared for life after high school, whether they choose to enter the workforce directly, attend college, or pursue technical certifications. Our CTE program will offer various experiential education opportunities, including:

- **Internships**: Students will have the chance to work in local businesses or industries, gaining hands-on experience in their areas of interest. Internships will be coordinated through our Community Liaisons, which will help match students with suitable companies and mentors.
- **Job Shadowing**: Through job shadowing, students can spend a day or more observing professionals in their field of interest, giving them a deeper understanding of specific career roles and work environments.

- **Apprenticeships**: In partnership with local trades and industries, we will offer apprenticeship opportunities where students can earn while they learn, developing essential skills in fields such as manufacturing, automotive, technology, and more.
- **Cooperative Education**: Students can combine their academic learning with practical work experience through cooperative education opportunities, allowing them to apply what they learn in the classroom to real-world settings.
- **Mentorship Programs**: Local professionals will mentor students, providing career guidance, support, and networking opportunities.

To ensure a smooth transition into post-secondary education or the workforce, our Community Liaisons and Guidance Counselors will also offer job placement assistance, career counseling, and resume-building workshops. We will help students navigate job searches, prepare for interviews, and connect with employers seeking qualified candidates. For those continuing their education, we will support their college applications, scholarship searches, and enrollment processes, working closely with our post-secondary partners to ensure students are well-prepared for the next stage of their academic journey.

Dual Enrollment, Concurrent Enrollment, and College Credit Opportunities:
Through our partnerships with higher education institutions, Custom Class will offer dual enrollment and concurrent enrollment programs that allow students to earn both high school and college credits simultaneously. This not only reduces the overall cost of a college education but also gives students a head start in pursuing their career goals. Students who take advantage of these programs will be able to complete college prerequisites or earn technical certifications, giving them a competitive edge when entering the workforce or continuing their education.

Career Pathways and Technical Certifications:
In the future as we grow with the ability to hire more CTE teachers, Custom Class will also offer a variety of career pathways in fields such as information technology, business, and engineering. In addition to gaining practical skills, students will have the opportunity to earn industry-recognized certifications, which will enhance their employability upon graduation. Certifications in fields like computer programming, graphic design, and manufacturing will be integrated into our curriculum, ensuring that students graduate with credentials valued by employers. These certifications, combined with internships and dual/concurrent enrollment opportunities, will give Custom Class students the experience and qualifications they need to pursue their desired careers.

Alignment with Utah's Portrait of a Graduate:
Our CTE program aligns closely with Utah's Portrait of a Graduate, which identifies key competencies that students should develop to be successful in college, career, and life. These competencies include communication, critical thinking, creativity, collaboration, and adaptability. By focusing on real-world experiences, project-based learning, and industry partnerships, we ensure that Custom Class students not only meet academic standards but also develop the most transferable and essential skills required to thrive in today's dynamic work environment.

Preparing Students for Lifelong Success:
Whether a student chooses to pursue a four-year degree, enter a trade, or launch their own business, Custom Class's CTE program will provide them with the foundation for lifelong success. Our focus on experiential learning, career exploration, and hands-on opportunities ensures that students leave high school not only with a diploma but with the practical skills, professional networks, and confidence they need to succeed in their post-secondary endeavors.

In summary, Custom Class's Career and Technology Education program is designed to bridge the gap between academic learning and the real world. By providing students with opportunities for internships, job shadowing, mentorship, and dual enrollment, we are equipping them with both the academic credentials and practical skills necessary for a successful future in any career or educational path they choose to pursue.

A Typical Day for Students at Custom Class:

Elementary Students: For younger students in grades K-5, a typical day might begin with an online homeroom meeting, where they check in with their educators, parents, and peers. This meeting may include a growth mindset activity or a discussion about the day's learning goals.

After homeroom, students might engage in an asynchronous math lesson using iReady. In this virtual class, students would explore math concepts through interactive activities and receive direct instruction from an educator. Following this, they could transition to independent work on Imagine Learning, where personalized science exercises reinforce their understanding.

Later in the day, students might participate in a literacy lesson using Lexia. During this time, students could practice reading comprehension or phonics skills through engaging, interactive content tailored to their individual needs.

Throughout the day, students would have time for other asynchronous learning activities, including projects, collaborative assignments, and opportunities to explore real-world applications of what they've learned, whether at home, at our family service center with educators and peers, or with a community partner, and develop life skills identified in the Portrait of a Graduate.

Middle School Students: For students in grades 6-8, a typical day might include a mix of synchronous and asynchronous learning. A morning might start with a math lesson using Imagine Learning, followed by independent work on Canvas uploading their evidence of meeting success criteria. In their science class, students could explore complex concepts through project-based learning, such as building models or conducting virtual experiments.

Throughout the day, students would engage in collaborative projects with their peers, using discussion boards and digital tools to share their ideas and receive feedback from teachers. In the afternoon, students might work on their independent reading or complete asynchronous assignments that reinforce the day's lessons.

High School Students: For high school students, a typical day could involve taking BYU-IS courses in subjects such as English, history, or math, where they earn both high school and college credit. In their virtual classes, they would interact with peers and teachers through Canvas, participate in group projects, and complete assignments at their own pace.

Students might also engage in career exploration activities, such as internships or job shadowing, or work on a personal business project as part of their graduation requirements. In addition to their core academic work, high school students could participate in electives, such as Woodworking or Ceramics, giving them hands-on experience in fields that interest them.

By offering a personalized, flexible, and rigorous educational experience, Custom Class ensures that every student is equipped with the knowledge and skills needed to thrive in the 21st century. Through a combination of evidence-based curricula, personalized learning pathways, and real-world applications, we prepare students for a future filled with opportunities.

SECTION 4: Market Analysis

Location and Target Area:
Custom Class will be available to students throughout Utah, operating as a fully online educational platform. The administrative office for Custom Class will be located in Southern Utah, where school records and essential supplies will be securely housed. While Custom Class is an online institution, it will offer in-person opportunities at our Family Service Centers, including state-mandated testing, IEP meetings, tutoring, and in-person activities that are scheduled at accessible locations across the state. We have budgeted for up to two in our first year of operation, and up to three in our second year of operation. We will determine the locations based on enrollment with the aim that we will have a Family Service Center within one hour drive of 85% of our students.

Educational Landscape in the Target Area:
Utah's educational landscape has experienced a significant shift toward flexible, online, and hybrid learning options. Customized alternatives to traditional school are significantly on the rise. This includes homeschooling, which is increasing in popularity nationwide, including in Utah. According to a 2023 study, interest in the state has increased by almost 90% since 2019, and Utah ranks third nationwide for the best state to homeschool children[17]. A more recent survey from 2024 shows that most 52% of Utah parents with school-age children prefer one or more days of home-based education for their students[18].

This trend has continued post pandemic contrary to the popular belief among many, including those in education. "New data from John Hopkins Institute for Education Policy's Homeschool Research Lab found that 90 percent of states that report homeschooling enrollment found increases for the 2023-24 academic year despite assumptions many made that home instruction would fizzle out after the pandemic."[19] On top of this customizable educational savings account programs such as the new Utah Fits All Scholarship have been high in demand. The marketing for this program has developed an interest in flexible options for the thousands of the people who apply and cannot be served by this program[20] who are now looking for other options that are nearly as customizable. Our school is the perfect answer for this increasing demand of those seeking flexibility, but uncomfortable navigating a new system and its complexities on their own.

While these reports indicate a preference towards flexible, educational options, more specific examples of success exist in our state, where schools are serving families with a combination of online learning and those more personalized options, in-person and at home.

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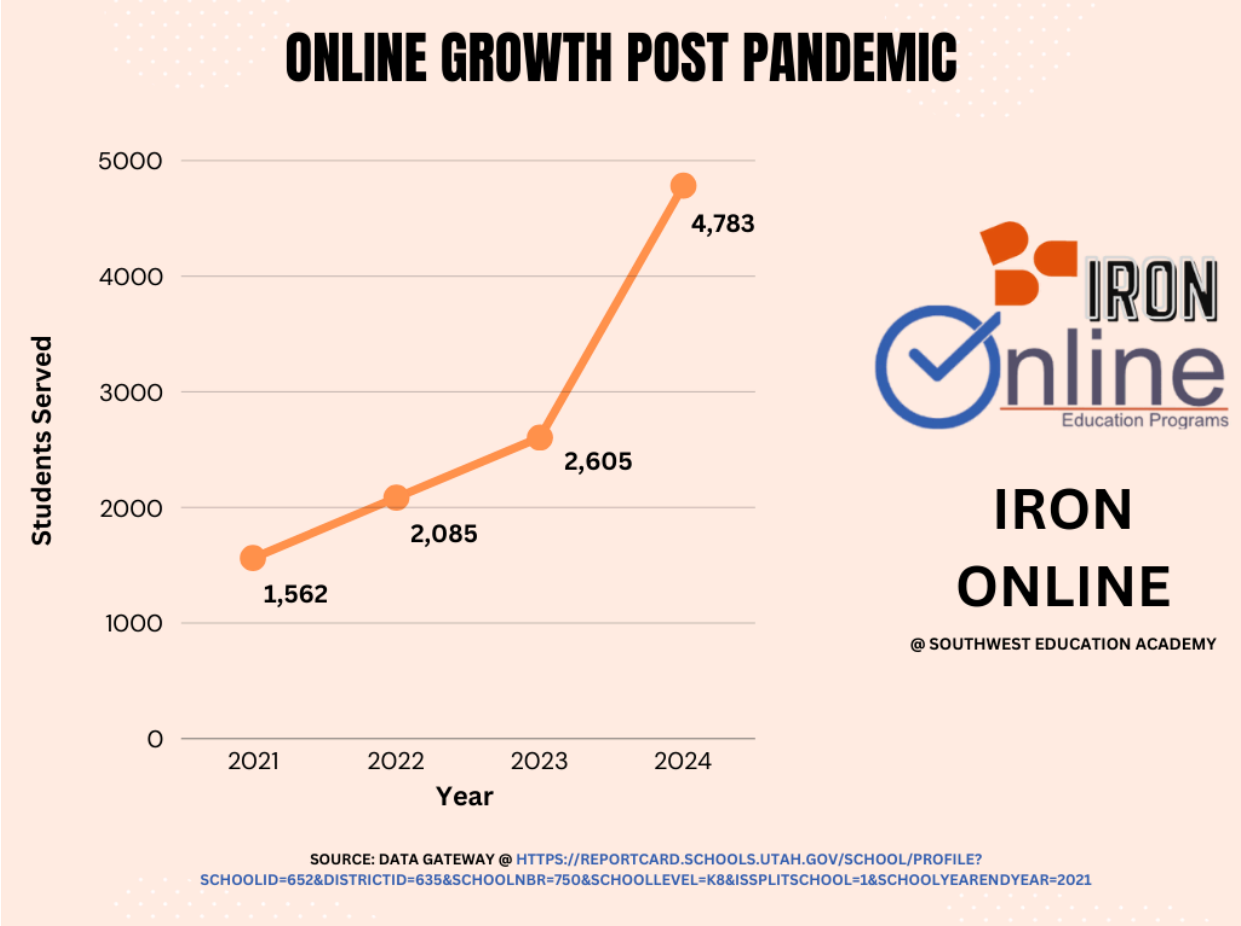
[17] ABCmouse: Discover the best Schools for Homeschooling, https://www.abcmouse.com/learn/abcmouse/discover-the-best-states-for-homeschooling/27980
[18] EdChoice: K-12 Education in Utah, https://edchoice.morningconsultintelligence.com/utah/
[19] Cochran, Lexi Lonas. "Homeschool Enrollment Increases Even after Pandemic: Data." *The Hill*, The Hill, 19 Sept. 2024, thehill.com/homenews/education/4886917-homeschool-enrollment-states-covid-pandemic/.
[20] Cortez, Marjorie. "How Many Utah Households Applied for the Utah Fits All Scholarship?" *Deseret News*, Deseret News, 23 Apr. 2024, www.deseret.com/education/2024/04/23/utah-choice-scholarship-fits-all-legislature-voucher-ace/

Schools like Iron Online are experiencing substantial success and enrollment growth[21], reflecting an increasing demand for personalized, mastery-based learning models that allow students and families greater control over their educational experience. Other schools that offer personalized competency-based learning, embedded with makerspaces for student hands-on learning have sprawled across the state, including Launch High School, which boasts a large waitlist while seeing student achievement scores between 15 and 30%[22] above district and state averages.



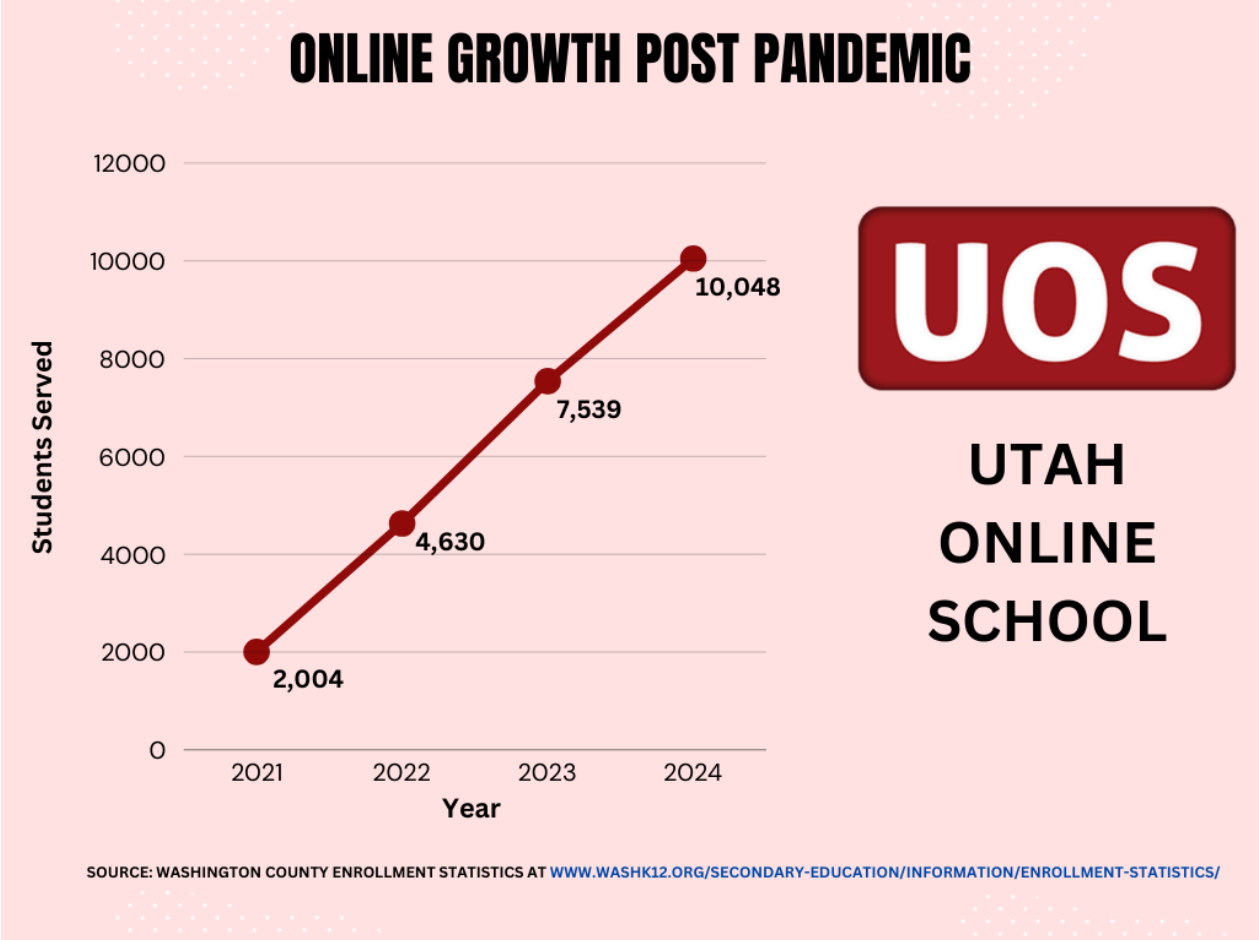
Traditional district schools across Utah, such as those in the Nebo, Weber, and Garfield districts, have also started leveraging online learning. However, most online schools remain focused on set curricula and only standard accountability metrics, leaving limited flexibility for students who need a more tailored approach to learning. Despite enormous growth in these districts, overall district enrollment in Utah is down by more than 10,500 students statewide with a 4,060

[21] Utah's Data Gateway - Iron Online at Southwest Education Academy Enrollment Profile https://reportcard.schools.utah.gov/School/Profile?SchoolID=652&DistrictID=635&SchoolNbr=750&SchoolLevel=HS&IsSplitSchool=1&schoolyearendyear=2021

[22] Utah's Data Gateway - Launch High School performance data. https://reportcard.schools.utah.gov/School/OverAllPerformance?SchoolID=186602&DistrictID=635&SchoolNbr=716&SchoolLevel=HS&IsSplitSchool=0&schoolyearendyear=2024

increase in charter schools[23]. This means over 6,000 students have opted out of public options and are seeking more customized alternatives.

Additionally, Utah Online continues to demonstrate growth post pandemic and has more than quadrupled the number of students they serve between 2021 and 2024[24]. These examples highlight the rising interest in customizable online schooling models. Within the state, public and charter schools alike are beginning to embrace this growing demand for non-traditional education pathways and those schools in this space are experiencing unprecedented growth.



Rationale for Custom Class in Utah:
Custom Class was conceived to address the increasing need for flexible, personalized, competency-based education in Utah. With a growing number of families seeking alternatives to traditional public school models, Custom Class provides an innovative option that allows students to take ownership of their learning through customized pathways. Demographics of Utah's students found on Data Gateway[25] shows that 31% of students come from economically disadvantaged backgrounds, 14% are students with disabilities, and 9% are multilingual

[23] Nesbitt, Carmen. "Utah's K-12 Schools See Historic Enrollment Drop." *The Salt Lake Tribune*, 19 Oct. 2024, www.sltrib.com/news/education/2024/10/19/fewer-students-are-enrolling-utah/
[24] Washington County School District's Enrollment Statistics https://www.washk12.org/secondary-education/information/enrollment-statistics/
[25] "State Profile Report." *Data Gateway*, reportcard.schools.utah.gov/State/Profile?StateID=99&schoolyearendyear=2023

learners. These students often struggle in the conventional, one-size-fits-all educational system. Custom Class is designed to meet these unique needs by offering adaptable, individualized learning paths that ensure mastery of key competencies at each student's pace.

In addition to addressing the needs of underserved populations, Custom Class offers significant opportunities for students looking to accelerate their academic progress. Over 50,000 Utah high school students were taking concurrent college classes in 2023[26], highlighting the demand for programs that allow students to earn college credits while in high school. Custom Class will offer these opportunities in a more flexible, personalized manner, catering to ambitious students eager to fast-track their academic and professional careers. This will be done with universities and colleges offering competency-based college credit opportunities such as those in "our list of potential post-secondary partner institutions".

Unique Characteristics of Custom Class:
Custom Class stands apart from other educational options in Utah by prioritizing customization and mastery-based learning. Unlike traditional schools, which follow a set curriculum and rigid progression, Custom Class allows students and their families to choose one of our evidence based curricula, applicable instructional supports, and learning terms schedule. Students progress at their own pace, demonstrating mastery of a concept before moving forward. This tailored approach ensures that students of all abilities and learning styles receive the support they need to thrive academically and develop essential life skills.

Furthermore, Custom Class integrates real-world applications of learning through partnerships with community mentors and industry professionals. This makes learning more engaging, providing students with the chance to apply their knowledge in real-world scenarios. For high school students, Custom Class also offers the opportunity to earn college credits, accelerating their path to a degree and reducing the cost of post-secondary education.

Educational Needs and How Custom Class Meets Them:
The need for personalized learning in Utah has never been greater. Many students, particularly those from economically disadvantaged or diverse backgrounds, struggle in the traditional schooling model. Custom Class provides a flexible, supportive environment that is particularly suited to these populations. By offering adaptive curriculum options, targeted support for students with disabilities, and multilingual resources, Custom Class meets the needs of students who are often underserved by traditional schools.

Our approach aligns with Utah's Portrait of a Graduate, ensuring that students not only achieve academic mastery but also develop critical life skills such as communication, collaboration, and adaptability. Developing these essential social and emotional skills also helps support students, particularly those from at risk backgrounds, in their academics. This model equips students with the tools they need to succeed in a rapidly evolving, technology-driven world.

[26] "Institutional Data Resources: Concurrent Enrollment." *Utah System of Higher Education*, 7 May 2024, ushe.edu/data-resources-concurrent-enrollment/#:~:text=o%20Concurrent%20enrollment%20course%20passing,most%20popular%20instructional%20delivery%20method

Challenges in Locating in the Target Area and Solutions:
One of the primary challenges in establishing an online school in Utah is ensuring equitable access to technology for all students, particularly those from economically disadvantaged backgrounds. Many families may not have access to the devices or internet connectivity required for successful online learning. To address this challenge, Custom Class will offer a technology assistance program that provides eligible students with laptops, tablets, and internet access points. This ensures that all students, regardless of their socioeconomic background or geographical location, can fully participate in the Custom Class learning experience.

Additionally, while online learning offers tremendous flexibility, it can sometimes lack the in-person interaction that some families desire. To mitigate this, Custom Class will host regular in-person events both at our family service centers and with community partners, allowing students to participate in social and academic activities that foster community and collaboration.

Enrollment Projections and Evidence of Demand:
Custom Class anticipates strong enrollment and growth over its first five years. In year one, we expect to enroll 400 students across grades K-12, with growth to 1,400 students by year five. We are confident that our projections and growth are realistic.

During the 2023-2024 school year, the percentage of Utah K-12 students participating in some form of online, hybrid, or homeschooling was significant. Over 8% of Utah students were enrolled in fully online or hybrid programs, particularly through the Statewide Online Education Program (SOEP)[27]. Additionally, homeschooling has seen steady participation, with around 5% of students being homeschooled statewide[28]. These statistics indicate that roughly 13% of Utah's K-12 population, representing 87,000 students, engaged in alternative educational formats including online learning, hybrid models, or homeschooling. Furthermore, the passage of HB 215, the Utah Fits all Scholarship, and the support of SOEP should lead to an increase in homeschooling and/or online adoption in the coming years. These statistics highlight the growing role of digital and flexible education options in Utah's educational landscape, and provide sufficient evidence that the enrollment projections for Custom Class are realistic.

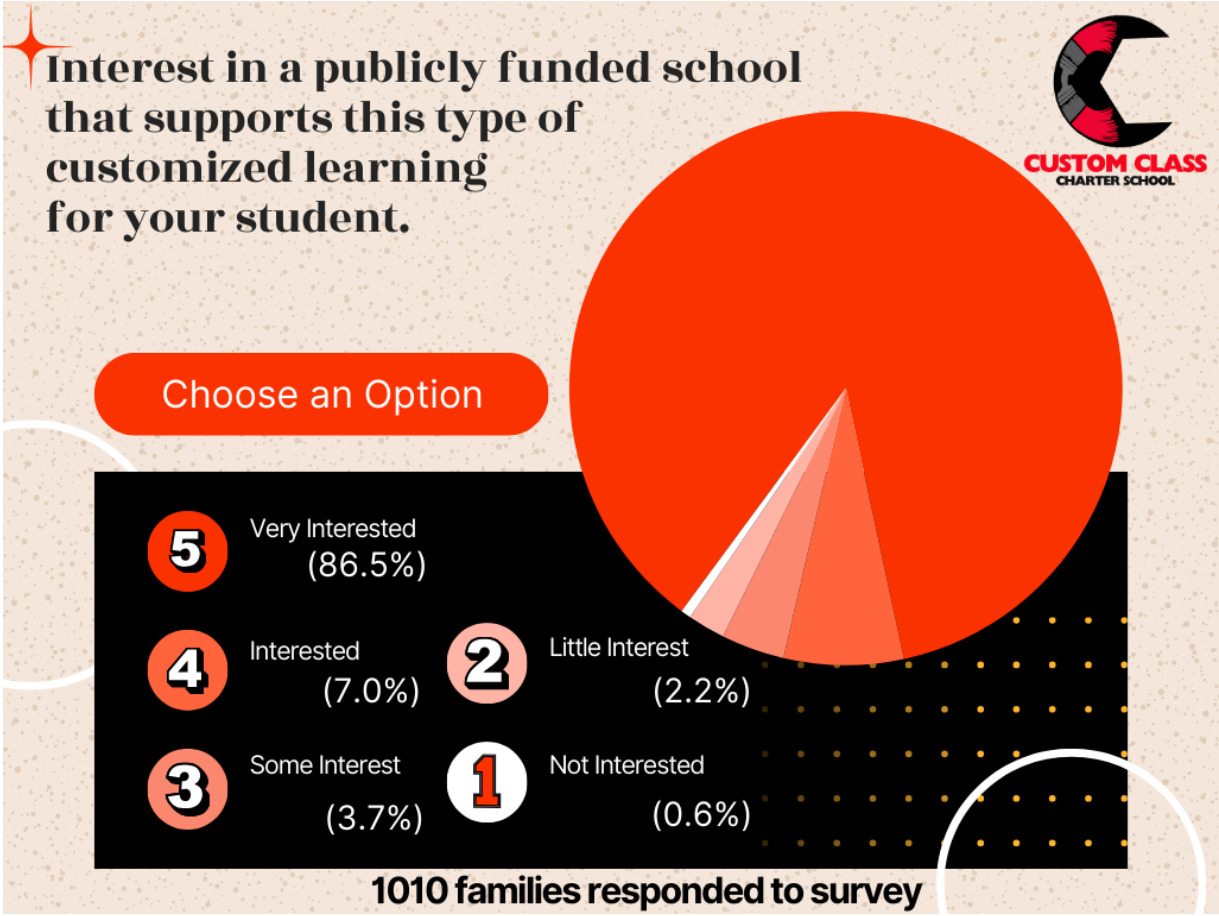
Importantly, these statistics don't just represent potential trends in Utah, but are supported by empirical evidence within existing schools that make use of online learning platforms. For example, Iron Online doubled its enrollment last year and Utah Online has quadrupled its students served over two years[29].

Perhaps more important than statistics or enrollment trends at similar schools, Custom Class distributed parent surveys to determine the interest in our school's customized learning model. We surveyed more than 1,000 families within Utah. Surveys[30] were sent out to a wide variety of families, some who participate in our ball hockey leagues, others who are seeking more customization than offered within traditional public school options and/or require alternative

[27] USBE: 2023 Public Education Summary
https://schools.utah.gov/policy/_policy_/_utahlegislativesession_/_2023_/2023PublicEducationSummary.pdf
[28] Estimates from the Utah Home Education Association (UHEA).
[29] "Enrollment Statistics." *Secondary Education*, Washington County School District,
www.washk12.org/secondary-education/information/enrollment-statistics
[30] Our survey can be found at https://forms.gle/GqTiqHAKUy3uNoRs9

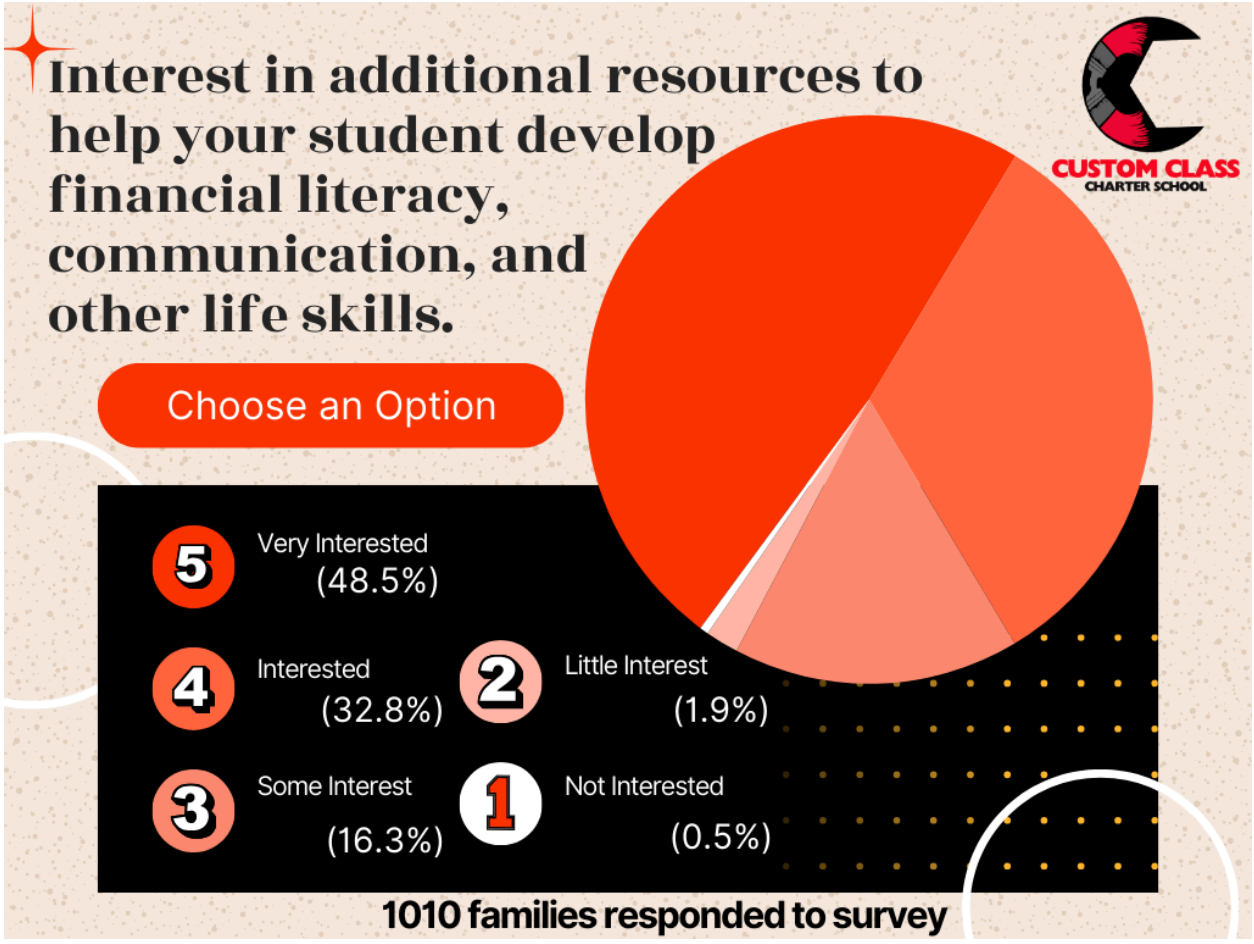
learning schedules. The vast majority of our surveyed participants currently participate in home schooling of various forms. A smaller subset participate in public online schools, while a few participants are enrolled in traditional, in person district, charter or private schools.The survey results demonstrate significant interest from families in the proposed customized online learning model for students. Below is an analysis of the key aspects of the data.

Interest in a Publicly Funded Customized Online School:



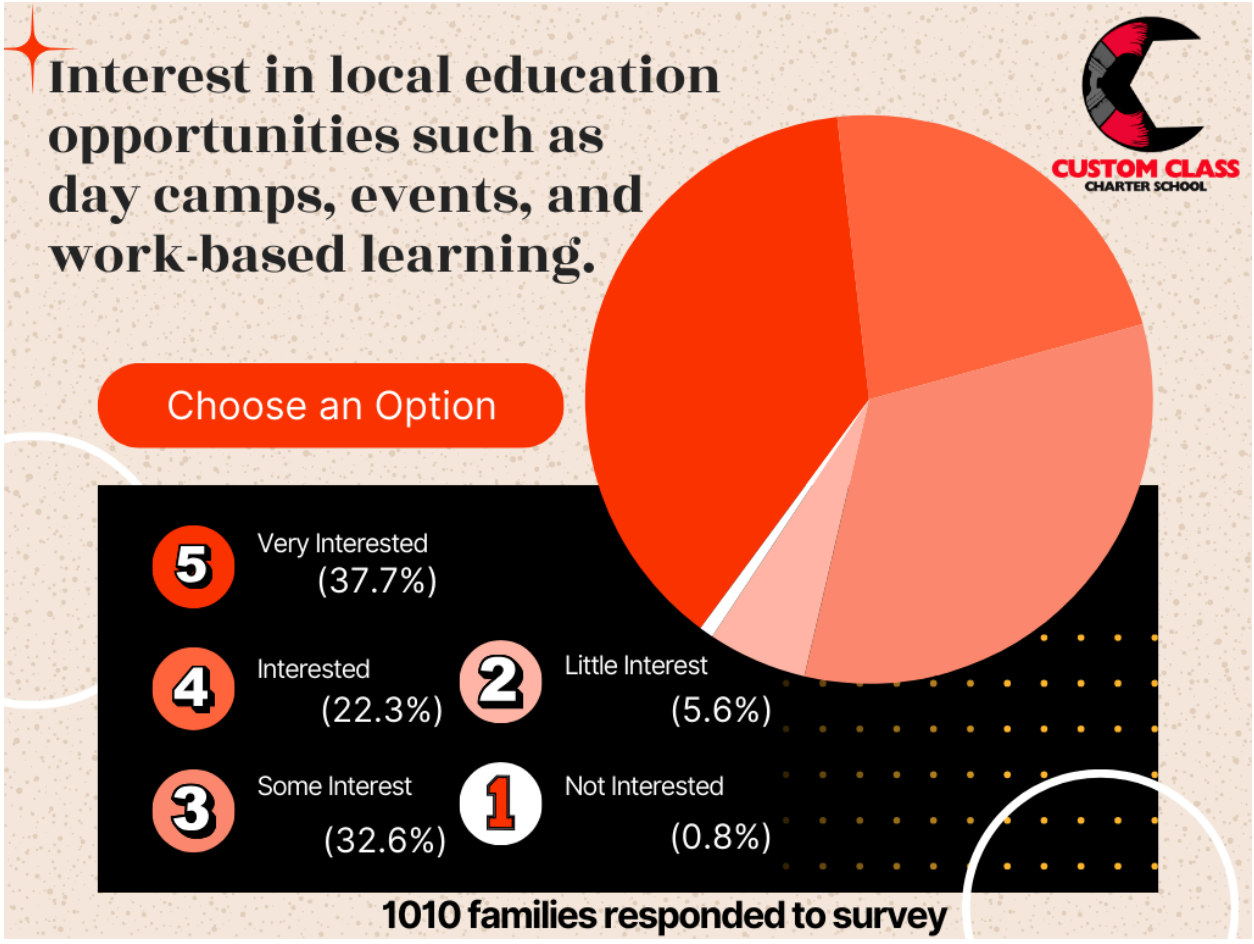
More than 85%, representing more than 860 families, expressed the highest level of interest in a publicly funded school that supports customized online learning for their students. This high level of interest reflects strong demand for alternative educational models that offer flexibility and personalization. Only a small fraction of respondents indicated low interest, demonstrating that even those with moderate interest could be drawn to the school if offered the right support and program features. This response indicates a robust potential student base for our school, aligning well with our goal of providing personalized education that fits each student's needs.

Interest in Additional Resources to Develop Life Skills:



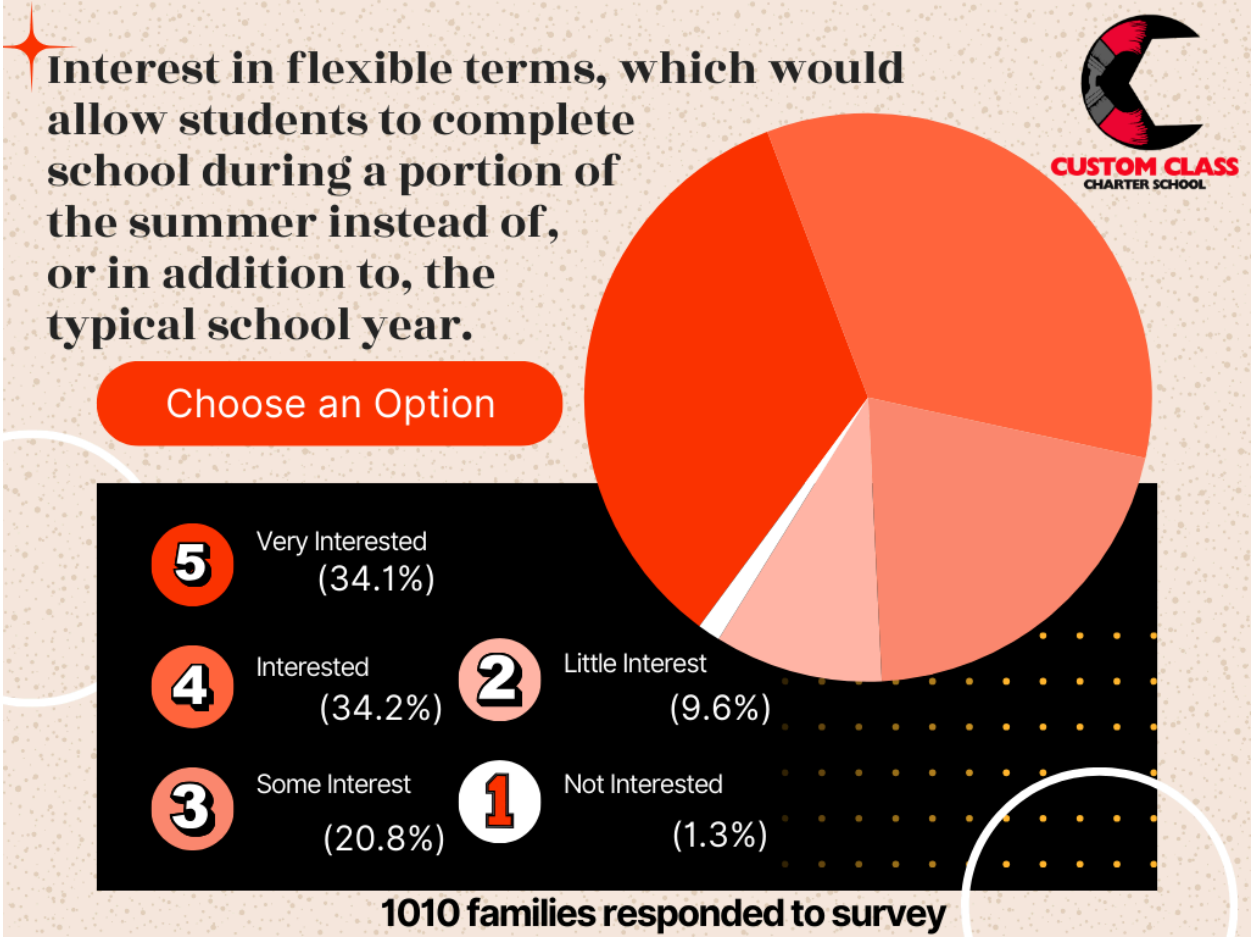
More than 80% indicated strong interest in additional resources aimed at helping students develop essential life skills such as financial literacy, communication, and other key competencies. These responses affirm our projection that most parents value resources beyond traditional academics. This aligns well with the Utah Portrait of a Graduate's focus on skills for lifelong success. With only a minimal percentage of respondents showing low interest, we are confident that our commitment to providing life skills education will be well-received by families.

Interest in Connecting with Local Educational Opportunities:



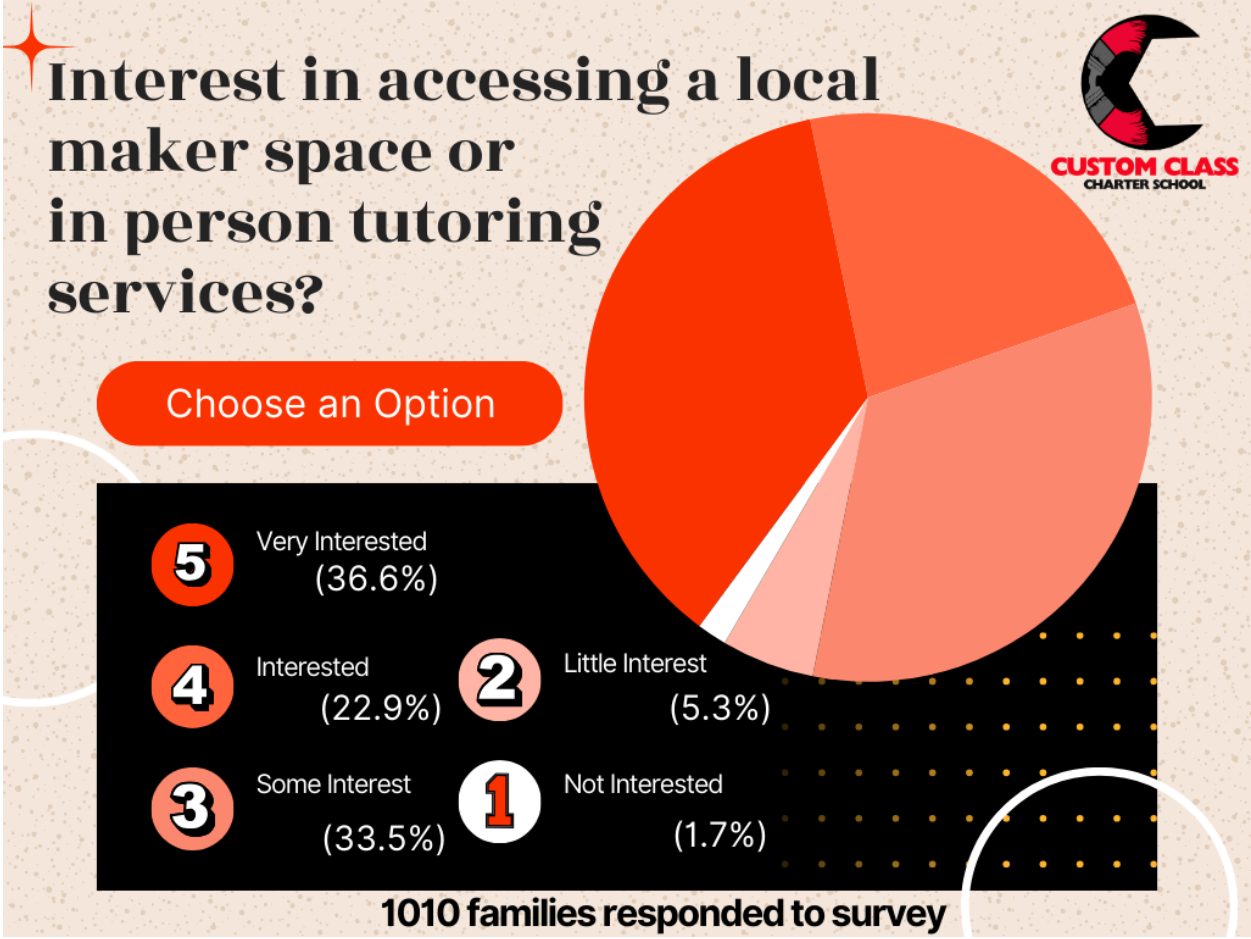
Respondents showed significant interest in local educational opportunities, such as day camps, events, and work-based learning options. Nearly 40% of respondents gave the highest score, with more than 30% showing strong interest in such opportunities. This indicates that while some students may prefer a primarily online learning model, there is still a strong desire for in-person educational experiences within their communities. We are optimistic that offering a blend of online learning with local educational partnerships will meet this demand and provide comprehensive learning opportunities for students.

Interest in Flexible Terms:



The survey responses on flexible learning terms show the balanced interest we anticipated, given that only some families need to take advantage of this opportunity for it to be valuable. More than 30% of respondents indicated high interest in flexibility that allows students to continue learning during the summer or spread learning over nontraditional schedules. While some respondents showed less enthusiasm for flexible terms, the majority of families expressed interest in these options. Offering flexible terms will serve the needs of those who value it while allowing others to follow a more traditional schedule.

Interest in Maker Spaces and In-Person Tutoring Services:



A significant proportion of families expressed interest in accessing local maker spaces and in-person tutoring services, with more than 35% selecting the highest level of interest and more than 20% showing strong interest. This suggests that while the majority of the educational program may take place online, there is a strong interest in supplemental learning opportunities that provide hands-on and interactive experiences. Offering maker spaces and tutoring services will add value to the overall educational program, catering to students who benefit from experiential learning and additional academic support.

These figures affirm that there is a strong base of families already familiar with online and flexible education models. The majority of these families are likely seeking enhanced customization and personalized education, which aligns perfectly with our school's mission. This data strongly supports our decision to focus on an online and flexible model, as it fits well with the current preferences of our target population.

The survey results demonstrate significant alignment between the needs of families and the educational model we plan to offer. We are particularly excited about the strong interest in life skills education and the flexible, personalized learning environment that we plan to provide.

Understanding the Target Population:
Custom Class has a deep understanding of the students it intends to serve. The school will cater to a diverse range of learners, including students with disabilities, multilingual learners, and those from economically disadvantaged households. By offering a highly personalized, competency-based education, Custom Class is designed to meet the needs of students who may not thrive in conventional educational environments, whether they are restricted by its limitations, or under supported with their diversity of needs. Our flexible, student-centered approach allows learners to work at their own pace, ensuring they have the time and support of educators necessary to master key concepts before moving forward.

In addition to serving students with unique learning needs, Custom Class is also focused on supporting high-achieving students who want to accelerate their academic progress. By offering dual-enrollment opportunities and the ability to earn college credits in high school, Custom Class provides an attractive option for students looking to get a head start on their post-secondary education with the potential to earn their bachelor's degree while in high school.

Why Students Will Choose Custom Class:
Families and students will choose Custom Class because it offers something different: a completely customizable learning experience that prioritizes student agency and mastery-based progression. Unlike traditional schools, where students are often passive recipients of tightly controlled curriculum and assessment and flexible expectations on learning, the opposite is true at Custom Class who empowers learners to take control and offers flexibility of their educational journey including some choice in curriculum and how they assess to demonstrate competency while demanding they meet rigorous outcomes. This freedom, combined with the ability to earn college credits in high school and access real-world learning opportunities, makes Custom Class an appealing choice for families seeking a more flexible approach to education.

Recruitment Plan:
Custom Class's recruitment plan will focus on reaching families who are interested in alternative educational models, particularly those seeking personalized learning environments. We will use a combination of digital marketing, in-person outreach, and partnerships with community organizations to connect with prospective families. Custom Class will also hold informational sessions and events across the state, ensuring that families from diverse backgrounds have the opportunity to learn about our school and its unique offerings. Our marketing materials will be available in multiple languages, ensuring that we can effectively reach multilingual families.

Marketing Plan to Reach a Diverse Population:
Our marketing plan is designed to reach a broad and diverse population, including students from a variety of racial, ethnic, linguistic, and socioeconomic backgrounds. Custom Class will use targeted digital advertisements, social media campaigns, and community outreach to connect with families throughout the state. We will work with local community organizations, including those that serve multilingual learners and students with disabilities, to ensure that all students have the opportunity to learn about and enroll in Custom Class. By emphasizing the flexibility, inclusivity, and customization of our program, we aim to attract a diverse student body that reflects the full spectrum of Utah's population.

SECTION 5: Governance

Governance Structure and Entity Holding the Charter:
Custom Class will be governed by our nonprofit corporation organized under the laws of the state of Utah. Our non-profit entity is responsible for all development, including school planning, legal and financial oversight, and staffing decisions. The Board of Directors will also serve as the governing board during the operational phase of the school, ensuring continuity in leadership and decision-making. The startup board may include founding members who possess specific knowledge and skills necessary to establish the school, but the board composition may evolve to include additional expertise once the school is operational. The governing board will continue to oversee the school's operations, ensuring its adherence to the charter, academic goals, financial health, and community engagement.

The founding board members have extensive experience in education, nonprofit management, business, finance, and community leadership. Collectively, they possess the skills necessary to ensure the successful launch and long-term sustainability of Custom Class. With their combined expertise, the board will maintain a cohesive and effective governance structure that is focused on achieving the school's mission and vision.

Legal Organization and Compliance:
Custom Class will be organized and managed under Title 16, Chapter 6a, Utah Revised Nonprofit Corporation Act. After entering into a charter agreement, the school will operate as a nonprofit organization, adhering to all state regulations governing charter schools.

Background Information:
Background Information Sheets for each board member can be found in **Appendix A**. These include relevant personal and professional details that demonstrate each member's capacity to govern the school effectively.

Legal Status Documentation:
Documentation of the entity's legal status, including the Articles of Incorporation, Bylaws, and minutes from the meetings where these documents were approved, are included in Appendices B, C, and D, respectively.

History and Purpose of the Governing Entity:
The history of our Board of Directors is rooted in a shared vision of helping children develop the confidence and life skills they need to succeed in their futures. This vision first took shape with the creation of Red Rock Hockey, a unique program that provided children and youth with an accessible way to pick up the sport of hockey. Designed with inclusivity in mind, Red Rock Hockey required no prerequisite skills or equipment, ensuring that anyone could participate regardless of their experience or financial background.

This initiative has been incredibly impactful for participants, many of whom have developed increased confidence, learned the value of teamwork, and found a supportive community of peers and adult mentors. The success of this program has been a testament to the power of

creating environments where children can grow, learn, and build meaningful relationships with mentors and teammates. Seeing the profound effects of this initiative, our Board of Directors felt inspired to broaden our efforts and create even more opportunities for children in our community to thrive.

Collectively, our Board brings a wealth of expertise in education, innovative public and charter school systems, business, finance, and community connections. With these diverse skills and a unified passion for fostering growth in children, we realized that the next logical step in fulfilling our mission was to open a charter school. This unique educational institution will not only build on the foundation of confidence and life skills that began with Red Rock Hockey, but it will also provide students with a personalized learning experience that prepares them for future success in both academic and personal endeavors.

Our shared vision of helping children develop into confident, capable individuals is what drives us, and we believe that through this charter, we can expand our impact, empowering even more students to achieve their full potential.

Articles of Incorporation:
The Articles of Incorporation, which state that neither the charter school authorizer nor the state, including any agency of the state, is liable for the debts or financial obligations of the charter school, are included in **Appendix B**.

Bylaws:
The Bylaws, which outline the operational procedures for Custom Class, are included in **Appendix C**. Our bylaws state that, “the board consists of up to five (5) directors who are elected for the term of three (3) years, and will hold office until their successors are duly elected and qualified at the following annual meeting of the Board.” In terms of board member appointments, the bylaws declare that, “Directors are to be voted on and elected at each annual meeting of the Board, unless a special meeting is expressly called to remove a director or fill a vacancy. If a director is elected, but is not yet qualified to hold office, then the previous director shall holdover until such time that the newly elected director is so qualified.” Finally, the Bylaws indicate that, “the board will hold at least eight (8) meetings a year.”

Governing Board Structure:
The governing board of Custom Class will consist of five members. Board members will be appointed by the existing board and serve staggered three-year terms to maintain continuity. The board will hold a minimum of four meetings annually to review school performance, approve budgets, and evaluate leadership. The board may call additional meetings as needed.

Governing Board Members:
The governing board includes the following members:

- **Matthew Middione, Ph.D.** – Current employment: Director, Research & Scientific Affairs at GE HealthCare; Relevant experience: Former employee at Stanford University and former board chair at Vista Charter School in Ivins, UT.

- **Cory Henwood** – Current employment: Innovation Director Iron County School District; Relevant experience: Founding leader of Launch High School and Iron Online and overseer of various public online and technology educational programs.
- **Cody Saulpaw** – Current employment: Financial Representative at Allstate; Relevant experience: Extensive experience in managing large-scale financial operations.
- **Tom Rupp** – Current employment: Credit Policy Support Specialist at Cardinal Financial Company, Limited Partnership; Relevant experience: Experience in business development and financial oversight in education and nonprofit sectors.
- **Doug Reed** – Current employment: Chief Operations Officer at Prestige Woodworks; Relevant experience: Strong community connections and business acumen.

The board plans to recruit additional members as needed to fill vacant seats, ensuring that the governance structure remains diverse and well-rounded. This may include recruiting professionals in education, finance, law, and community engagement, as well as parents and educators who are passionate about the mission of Custom Class.

Statement of Assurance:
The board assures that, within 30 days of authorization, a background check will be completed for each board member as required by 53G-5-302.

Board Professional Development:
To ensure the governing board is well-prepared to fulfill its responsibilities, members will participate in ongoing professional development. The board will engage with the Utah Association of Public Charter Schools (UAPCS) for training on governance, legal responsibilities, school finance, and academic oversight. An annual gathering will be held to review the board's performance, evaluate the school's management, and set goals for continuous improvement. Additionally, the board will conduct self-evaluations and participate in annual training focused on charter school governance.

An organizational chart outlining the relationships between the board, school management, and key stakeholders (such as teachers, parents, and community organizations) has been developed and included to ensure clarity in roles and responsibilities.

Governance Role and School Management:
The Custom Class Board understands that its primary responsibility is to govern, not manage, the day-to-day operations of the school. The board will hire and evaluate the school's director, who will oversee school operations, including curriculum implementation, staffing, and student performance. The board will also work closely with the school's Business Administrator (BA) to ensure financial sustainability and compliance with state and federal laws.

Board Capacity in Education Program Oversight:
The board members have extensive experience overseeing successful educational programs. Matthew Middione, who has served as the board chair at Vista Charter School and brings valuable leadership experience. Similarly, Cory Henwood's background in founding and managing online and magnet schools like Launch High School and Iron Online equips him with

the skills to guide Custom Class through the development and implementation of its educational program.

Financial Oversight Capacity:
Cody Saulpaw and Tom Rupp will oversee the financial operations of Custom Class. Both have significant experience managing large budgets, developing financial plans, and ensuring responsible allocation of public funds. Their combined expertise ensures that Custom Class will operate with financial integrity and transparency. In addition, the board will lean on Matthew Middione's previous experience as the head of the finance committee at Vista Charter School.

Legal and Compliance Knowledge:
Cory Henwood's knowledge of Utah's education laws, board rules, and compliance regulations will ensure that Custom Class meets all legal obligations. Matthew Middione's previous experience as board chair at Vista Charter School also ensures the board's compliance. The board has, and will continue, to seek guidance from legal professionals, state charter board staff, and state lawmakers as necessary to ensure full compliance with applicable statutes and policies.

Community Connections and Engagement:
Board members, including Doug Reed, Tom Rupp, and Cody Saulpaw, have strong ties to the local community, professional trades, and extensive networks with business leaders and community organizations. Their connections will help build partnerships that support the school's mission and provide students with opportunities for real-world learning experiences. They will work closely with our guidance counseling team and our community liaisons to help them connect our students and families to the appropriate partners and resources to meet their needs. For younger students, Custom Class integrates community involvement through structured activities at Family Service Centers and partnerships with local organizations, helping foster social skills and real-world experience from an early age. This will include in-person activities, camps, and workshops that will appeal to our youngest students.

Capacity to Found and Sustain a Quality School:
With Cory Henwood and Matthew Middione's proven success in founding and sustaining other schools, including Iron Online, Launch High School, and Vista Charter School, the board is well-positioned to establish and maintain a high-quality educational institution. The combined experience of the board ensures that Custom Class will be able to meet the needs of its students and continue to thrive in the long term.

SECTION 6: Staffing

Organizational Structure and Day-to-Day Operations:
Custom Class will operate with a robust organizational structure designed to support its unique model of personalized, mastery-based learning. The organizational structure reflects a commitment to clear roles, collaboration across functions, and a focus on student success. The Executive Director will be the central figure in the leadership hierarchy, with a primary responsibility for both academic and operational functions. Under the Executive Director, a BA, Curriculum Coordinators, Special Education Coordinators, and other administrative staff will support the daily functioning of the school. This structure is specifically designed to ensure that the school's educational and operational activities align with its mission and vision while also allowing for adaptability to meet student needs.

On a daily basis, the Executive Director will work closely with academic and operational staff to ensure the smooth implementation of personalized learning. The Executive Director is responsible for overseeing the development and execution of the school's curriculum, ensuring it aligns with the Utah Core Standards, Utah's Portrait of a Graduate, and the school's emphasis on mastery learning. This role will involve monitoring teacher performance, tracking student outcomes, and ensuring that the school's approach to education remains flexible enough to meet the needs of every student. Regular leadership team meetings will be held with the Curriculum Coordinators and Special Education Coordinators to assess the implementation of personalized learning paths, identify students who may need additional support, and collaborate on intervention strategies where necessary. These meetings will ensure that every student has the opportunity to achieve mastery in their learning objectives.

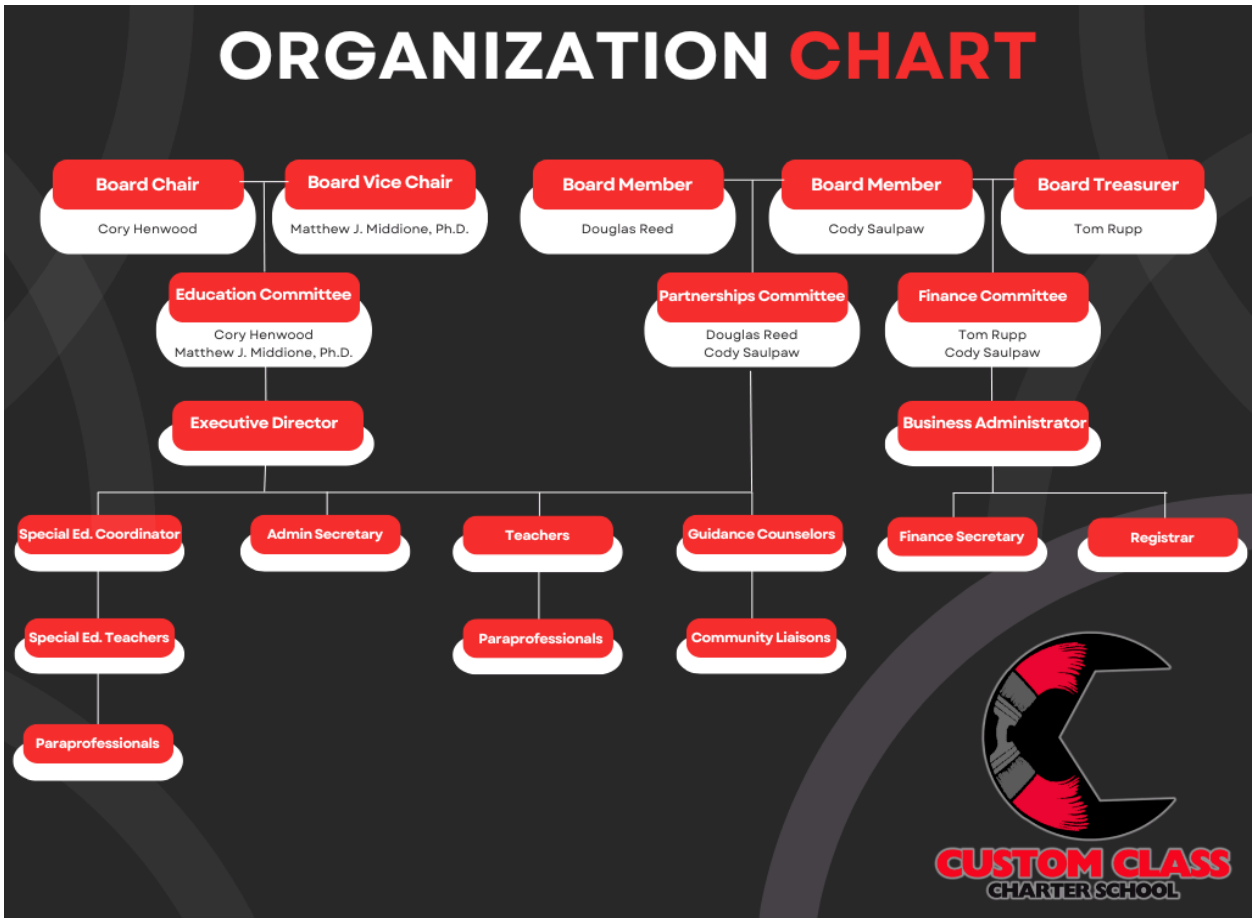
The BA will manage the school's financial health, overseeing all fiscal matters, including the preparation of the annual budget, payroll, procurement, and compliance with state and federal financial regulations. The BA will work in tandem with the Executive Director to ensure that financial decisions reflect the school's academic priorities, such as hiring qualified staff, procuring high-quality curriculum resources, and providing professional development opportunities. The financial strategy of the school will align with the goal of maximizing educational outcomes for students while ensuring operational efficiency.

Administrative support staff will provide essential day-to-day operational assistance. Their roles will include managing the school's Student Information System (SIS), maintaining accurate student records, handling communications with families, and scheduling meetings between teachers, parents, and support staff. Additionally, they will be responsible for organizing student activities, managing the logistical aspects of school events, and supporting the operational needs of both the academic and administrative teams. This level of support will enable the teaching staff to focus on their instructional responsibilities without being burdened by non-academic tasks.

The Executive Director and the leadership team will ensure that there is a coordinated and efficient approach to both academic and operational tasks. This will create a seamless experience for students and their families, ensuring that students receive the necessary

academic support and teachers have the resources they need to succeed. The organizational structure emphasizes collaboration and communication across all roles, with clear delineation of responsibilities to maintain accountability and focus on student achievement.

Key Administrative Roles and Responsibilities:
The success of Custom Class hinges on the effective execution of roles by key administrators, each of whom will bring specialized expertise to ensure the school meets its goals. At the top of the hierarchy is the Executive Director, who will play a vital role in shaping the strategic direction of the school. As the primary instructional and operational leader, the Executive Director will oversee all aspects of the school's daily operations. This includes ensuring compliance with the Utah Core Standards and Portrait of a Graduate, overseeing curriculum development, making key personnel decisions, and managing the budget in coordination with the BA. Additionally, the Executive Director will act as the key decision-maker on matters related to academic policies, operational strategy, and community relations, making sure that the school remains aligned with its mission to provide personalized, mastery-based learning.



The Executive Director will also be responsible for cultivating partnerships with community organizations, educational institutions, and local businesses to enhance the school's educational offerings and provide students with real-world learning experiences. As a visible figure within the school community, the Executive Director will engage regularly with parents,

students, and staff to address concerns and provide leadership on key issues. The role also involves ensuring the school remains in compliance with all applicable state and federal education laws, including those related to special education, teacher certification, and financial reporting. Another critical aspect of the Executive Director's role is fostering a culture of continuous improvement, which includes setting measurable goals for academic performance, overseeing the professional development of teachers, and ensuring that all staff are held to high standards of excellence.

The Business Administrator (BA) will be a key partner to the Executive Director in managing the financial health of the school. The BA will develop and oversee the school's financial plans, ensuring that all resources are used efficiently to support student learning. Responsibilities include preparing and managing the school's operating budget, ensuring timely payroll processing, managing procurement, overseeing contracts with vendors, and ensuring the school's compliance with all state and federal financial regulations. Additionally, the BA will present financial reports to the governing board and ensure that all financial practices align with best practices for public charter schools. The BA's collaboration with the Executive Director will ensure that the school's financial decisions reflect the strategic priorities of the school, particularly the goal of providing personalized instruction and supporting professional development for staff.

Teachers will play an essential role in supporting students and parents in their pursuit of competency in each standard addressed by the curriculum and each selected Portrait of a Graduate competency. Teachers will ensure that all instructional materials align with Utah Core Standards while also supporting the school's personalized learning model. Teachers will develop learning goals, success criteria, assessment opportunities, instructional materials, and intervention plans that are tailored to the needs of individual students. They will also participate in ongoing professional development to ensure that they are equipped with the skills and tools necessary to deliver personalized instruction and assess student mastery. Teachers will monitor the effectiveness of instructional strategies, collaborate with each other and paraprofessionals to analyze student data, and help to create intervention plans for students who are struggling to meet academic standards.

The Special Education Coordinator will oversee services for students with disabilities, ensuring that appropriate accommodations and modifications are in place for each student's Individualized Education Program (IEP). This role will involve close collaboration with general education teachers, parents, and outside service providers to ensure that students with special needs are fully integrated into the school's personalized learning environment. The Special Education Coordinator will also ensure that the school remains in compliance with all federal and state laws regarding special education, including the IDEA. In addition, the Special Education Coordinator will provide ongoing professional development to teachers to ensure they are equipped to meet the diverse needs of students with disabilities.

Additional support staff—such as Community Liaisons, Paraprofessionals, and Administrative Assistants—will play critical roles in the day-to-day functioning of the school. Community Liaisons will connect students and their families with opportunities in their community such as

events, camps, work-based learning and internship opportunities. Paraprofessionals will assist teachers by providing individualized support to students, particularly those with special needs or those who are struggling academically. Administrative Assistants will manage the logistical aspects of the school's operations, such as maintaining student records, purchasing, scheduling meetings, and ensuring that all communications between the school and families are handled efficiently and professionally.

School Leader Qualifications and Responsibilities:
The Executive Director of Custom Class must possess extensive experience in educational leadership, particularly in managing innovative or personalized learning programs. The school's mission to provide a flexible, mastery-based learning environment requires a leader who is not only skilled in curriculum development and instructional leadership but also adept at managing a diverse team of educators and support staff. The ideal candidate will have a proven track record of success in school leadership, including experience overseeing curriculum development, managing instructional staff, and ensuring student achievement. A graduate degree in education or a related field is required, along with at least five years of experience in a leadership role. Experience in online or blended learning environments will be highly valued, as these skills align with the school's mission to offer personalized learning that leverages technology.

In the event that the Executive Director is not identified within 6 months after this application is approved, the governing board will implement a rigorous recruitment process to identify a candidate who possesses the leadership qualities necessary to guide the school. The recruitment process will focus on candidates with experience in flexible, innovative educational models and the ability to navigate the complexities of an online or hybrid learning environment. The school's governing board will work with educational networks, leadership development organizations, and recruitment firms specializing in school leadership to ensure a high-quality candidate pool. The goal is to find a leader who is not only capable of managing the operational aspects of the school but also passionate about personalized learning and committed to creating an environment where every student can succeed.

The Executive Director's responsibilities will include overseeing all academic and operational functions, managing teacher recruitment and retention, ensuring compliance with state and federal regulations, and fostering a positive school culture. The Executive Director will also be responsible for leading the school's strategic planning process, working closely with the board to set long-term goals and ensuring that the school remains on track to achieve its mission. Additionally, the Executive Director will oversee the professional development of staff, ensuring that teachers receive the training and support they need to deliver high-quality instruction. As the public face of the school, the Executive Director will also be responsible for building relationships with parents, community leaders, and external partners to enhance the school's visibility and reputation.

Staffing Plan and Recruitment Strategies:
Custom Class's staffing plan is designed to scale with the school's growth while maintaining a focus on personalized instruction and mastery-based learning. In the first year, the school will prioritize hiring elementary and middle school teachers, special education staff, community

liaisons, paraprofessionals, and administrative support staff. High school students will largely be served in dual enrollment college programs within the first year. As the school expands to serve more high school students in subsequent years, additional staff will be hired to ensure that the school can meet the needs of its growing student body. The staffing plan is flexible and will evolve as enrollment increases, allowing the school to remain responsive to the needs of its students and families.

The recruitment strategy for Custom Class will focus on attracting educators with experience in personalized learning environments, mastery-based learning models, and online education. The school will use a combination of local and national recruitment efforts, including posting job openings on educational job boards, working with teacher preparation programs, and reaching out to educators with experience in charter schools or innovative educational models. Additionally, the school will actively seek out teachers who have experience working in flexible, student-centered learning environments and who are passionate about using technology to enhance learning outcomes.

Recruitment efforts will also emphasize the unique aspects of the school's mission and vision, highlighting the opportunity for educators to be part of a forward-thinking, innovative school that values flexibility, creativity, and student engagement. Custom Class will provide competitive salaries and benefits packages, along with opportunities for professional growth and leadership development. This will make the school an attractive option for educators who are looking for a work environment that encourages autonomy and innovation.

Instructional Skills, Experience, and Professional Development:
Teachers at Custom Class will be required to have a strong foundation in differentiated instruction, mastery-based learning, and the use of data to inform instructional decisions. Because the school's educational model focuses on personalized learning paths for each student, teachers must be able to create flexible lesson plans that accommodate a wide range of learning styles and paces. Additionally, teachers will need to be proficient in using technology to deliver both synchronous and asynchronous instruction, as well as in creating assessments that measure student mastery of specific competencies. Experience with competency-based education and online learning platforms will be highly valued in the recruitment process.

To ensure that teachers have the skills and knowledge they need to be successful in this environment, Custom Class will implement a comprehensive professional development plan that includes ongoing training in mastery-based learning, technology integration, and data-driven instruction. Additionally, professional development will focus on collaboration, professional learning communities, and peer mentoring, providing teachers with opportunities to learn from one another and share best practices.

Custom Class's professional development plan will also include training in how to build strong relationships with students and families, as this is a critical component of the school's personalized learning model. Teachers will be trained in effective communication strategies and will learn how to engage families in the learning process, helping to create a supportive learning environment both at school and at home.

Strategies for Recruiting and Retaining Effective Teachers:
Recruiting and retaining high-quality teachers will be a top priority for Custom Class. The school will emphasize the flexibility and autonomy that come with working in a personalized, mastery-based learning environment as key selling points in its recruitment efforts. Teachers who excel in working closely with students and families, particularly those who are experienced in personalized learning or tutoring, will be sought after. Custom Class will offer competitive salaries and benefits, along with a supportive work environment that encourages innovation and professional growth.

The school will also provide teachers with flexibility in their work schedules, allowing them to balance live instructional hours with asynchronous planning and grading. This flexibility will be particularly appealing to teachers who are looking for a better work-life balance. Additionally, Custom Class will offer opportunities for career advancement, including leadership roles within the school. By creating a positive, collaborative work environment where teachers feel valued and supported, the school will be well-positioned to retain its top talent.

Typical Day for a Teacher at Custom Class:
A typical day for an educator at Custom Class is dynamic and rooted in personalized education. Teachers connect with students, parents, and paraprofessionals both over Zoom and at the Family Service Centers, where they play an integral role in helping students map out individualized learning journeys, aligning their selected curriculum and personal interests to how they might demonstrate mastery by meeting the clear success criteria. This includes collaborating with other educators, students, and their families to create learning plans tailored to meet specific goals and guiding them as they gather and present evidence of their progress toward meeting the success criteria the teacher has established. These plans are thoughtfully aligned with each student’s unique needs and objectives, ensuring clarity on learning paths and outcomes. The teacher scores student evidence regularly and provides clear and thoughtful feedback to help them make progress towards meeting the established academic and portrait of a graduate competencies. The teacher plays a central role in providing primary instruction and they work together with paraprofessionals to give every student needing extra support the time and resources to be able to meet the rigorous success criteria.

Teachers also work closely with community liaisons to develop real-world opportunities, such as internships, apprenticeships, and job shadowing, to enrich students' educational experiences. This could involve supporting a student in exploring performance opportunities in the arts or guiding a group working on a project to address community concerns. Teachers regularly work with guidance counselors and parents/guardians to support each student’s personal circumstances. Whether helping a family integrate upcoming travel into a learning experience or assisting with schedule adjustments due to family health needs, educators adapt and personalize the educational journey for each student. At the end of the day, teachers reflect on the unique challenges and successes, continually evolving to meet the needs of the young people and families they serve.

Staffing Budget and Alignment with Educational Program:
The staffing budget for Custom Class will be aligned with the school’s educational priorities,

ensuring that sufficient resources are allocated to support personalized learning and mastery-based instruction. The budget will provide for a full complement of instructional and support staff, including teachers, special education staff, paraprofessionals and community liaisons. Additionally, the budget will allow for flexibility in staffing, ensuring that the school can provide individualized support to students through tutoring, small group instruction, and one-on-one interventions.

Teachers at Custom Class will be expected to work flexibly, providing live instructional hours for students and families while also engaging in asynchronous tasks such as grading, planning, and professional development. The budget will ensure that teachers have access to the resources they need to be successful, including curriculum materials, technology, and professional development opportunities. The school will also invest in administrative support staff to handle non-academic tasks, allowing teachers to focus on instruction and student engagement.

Staffing Plan Reflecting Enrollment Growth:
As the school's enrollment grows, Custom Class's staffing plan will evolve to meet the needs of its expanding student body. In the first year, the school expects to enroll up to 400 students, with a focus on elementary and middle school grades. To support this enrollment, the school will hire an appropriate number of teachers, special education staff, paraprofessionals, and administrative support staff. The number of staff are included in the budget. As the school expands to serve more high school grades in subsequent years, additional teachers and support staff will be hired to ensure that the school can continue to offer personalized instruction to all students.

By year five, the school expects to have an enrollment of 1,400 students, which will require a significant increase in staffing. The school's leadership team will carefully monitor enrollment trends and adjust the staffing plan accordingly, ensuring that the school has enough teachers, support staff, and administrators to maintain an adequate student-to-staff ratio and provide personalized learning experiences. The school will also expand its leadership team to include assistant directors and instructional coaches as needed, who will help manage the increased number of students and staff.

Qualifications for Non-Certificated Personnel:
Non-certificated instructional personnel, such as paraprofessionals and student support staff, will be selected based on their experience working with students and families in educational or community settings. These individuals will need to demonstrate strong communication skills, the ability to work independently, and a commitment to supporting student learning. Experience in education, customer service, community programs, or other relevant fields will be prioritized, and training will be provided to ensure that non-certificated staff members are equipped to support students and families effectively.

Non-certificated staff will play a key role in the daily operations of the school, providing direct support to both teachers and students. Paraprofessionals, for example, will work closely with students who need additional help, while administrative support staff will assist with tasks such as maintaining student records and handling communications between the school and families.

Training for non-certificated staff will focus on effective communication, technology use, and strategies for supporting student learning and well-being.

Employer-Employee Relationship and Compliance:
Custom Class will foster a professional, transparent, and supportive employer-employee relationship. All staff members will undergo annual evaluations, with performance reviews based on clear, measurable criteria such as job performance, student outcomes, and contributions to the school's mission. The school will comply with all state and federal employment laws, including those related to employee background checks, certification requirements, and the employment of relatives.

Staff evaluations will be conducted by the Executive Director, with input from other members of the leadership team. The evaluation process will include self-assessments, peer feedback, and observations of instruction, ensuring that teachers receive comprehensive feedback on their performance. Evaluations will also be used to identify areas for professional growth, with professional development opportunities provided to help teachers improve their skills and advance their careers.

The school will have clear policies in place regarding the employment of relatives, ensuring that all hiring decisions are made fairly and transparently. Additionally, all employees will be required to undergo background checks before beginning employment, in compliance with state law. This will ensure that all staff members meet the highest standards of safety and professionalism.

In conclusion, Custom Class's staffing plan and organizational structure are designed to support its innovative educational model, ensuring that the school has the capacity to provide personalized, mastery-based learning to all students. With a strong focus on recruiting and retaining high-quality teachers, providing professional development, and maintaining a flexible staffing plan that can adapt to the school's growth, Custom Class will be well-positioned to achieve its mission and provide a high-quality education to its students.

Sample Policies:

a. Compliance with Background Check Requirements Policy

BACKGROUND CHECKS POLICY - CUSTOM CLASS CHARTER SCHOOL

1. EMPLOYEE BACKGROUND CHECKS

1.1. When a prospective employee applies for a position with Custom Class (LEA), the individual must complete an employment application that includes the following warning:

1.2. "All references listed in this application may be verified by Custom Class, and it is the policy of the school that providing false information will result in the immediate rejection of your application with no further consideration. If false information is discovered after hire, it will be grounds for immediate termination for cause, and may also lead to criminal prosecution."

1.3. All prospective employees must provide personal identifying information, including current name, former names, nicknames, aliases, date of birth, address, telephone number, driver's license number or other government-issued identification number, Social Security number, and fingerprints.

1.4. All prospective employees must sign a written consent, release, waiver, and authorization form allowing Custom Class to contact past employers, supervisors, and any relevant licensing agencies for background checks. This includes submitting personal identifying information to the Bureau of Criminal Identification within the Department of Public Safety for ongoing monitoring and verification of credentials.

2. CRIMINAL BACKGROUND CHECK

2.1. The Executive Director or their designee will require all prospective employees, volunteers who will have significant unsupervised access to students, and, where reasonable cause exists, current employees, to submit to a criminal background check. The individual must provide personal identifying information such as current and former names, nicknames, date of birth, address, driver's license or other government-issued identification, Social Security number, and fingerprints.

2.2. Applicants, volunteers, or employees must sign a waiver authorizing the criminal history background check and acknowledging that the information will be made available to those involved in the hiring or promotion decision.

2.3. Unless a criminal background check is conducted as part of an employee's continued state licensing, employees will be required to submit to criminal background checks every six years or more frequently, based on the employee's assignment.

2.4. Custom Class will pay the cost of the background check for selected applicants.

2.5. The school may require an employee to cover the cost of a periodic criminal background check for continued employment.

2.6. Individuals have the right to review and respond to any information obtained through the criminal background check.

2.7. In making employment decisions based on criminal history, Custom Class will consider State Board of Education rules and:

- Any convictions, including pleas in abeyance
- Any matters involving felonies
- Specific offenses, including:
    - Sexual offenses
    - Class A misdemeanor drug offenses
    - Offenses against individuals as defined in Title 76, Chapter 5
    - Class A misdemeanor property offenses within the past three years

    - Multiple occurrences of the same criminal offense within the past eight years

2.8. If a person is disqualified from employment due to information obtained from the criminal background check, they may request a review of the information and provide a response to the reasons for disqualification.

2.9. Criminal background check information is confidential and may only be disclosed as outlined in this policy.

3. PERSONAL REPORTING OF ARRESTS AND CONVICTIONS

3.1. Employees are required to report arrests for specific offenses to the Executive Director or their designee within 48 hours or as soon as possible. This includes arrests for:

- Alleged sex offenses
- Drug-related offenses
- Alcohol-related offenses
- Offenses against individuals under Utah Code Ann. §§ 76-5-101 through 76-5-413
- Felony offenses under Utah Code Ann. § 76-6
- Crimes of domestic violence under Utah Code Ann. § 77-36
- Federal or out-of-state offenses comparable to those listed above

3.2. Employees must report convictions, including pleas in abeyance or diversion agreements, within 48 hours or as soon as possible after receiving notice of the outcome.

3.3. Following notification of an arrest, the Executive Director or their designee will review the arrest information and evaluate the employee's role and responsibilities. Immediate suspension from duties involving student supervision will be enacted for sex offenses or other offenses that pose a risk to students. Employees responsible for transporting students or operating school vehicles will be suspended from these duties if the arrest involves drugs or alcohol.

3.4. Employees must report to work after an arrest unless directed otherwise by Custom Class.

3.5. Failure to report an arrest or conviction as required by this policy may result in disciplinary action, including termination.

3.6. Records related to an employee's arrest, conviction, plea in abeyance, or diversion agreements, along with final administrative actions, will be kept for at least two years following termination of employment.

4. LEA REPORTS TO THE UTAH STATE BOARD OF EDUCATION

4.1. The Executive Director or their designee will report information regarding the arrest or conviction of licensed educators to the Utah State Board of Education (USBE) within 48 hours of receiving the information.

4.2. Licensed educators include individuals who hold a valid Utah educator license, including teachers, administrators, and employees in positions requiring licensure, as well as those in student teaching or alternative licensure programs.

5. PROCEDURE FOLLOWING THE ARREST OF AN EMPLOYEE

5.1. In the event of an arrest, Custom Class will take the following steps:

- Immediate suspension from student supervision duties for sex offenses or other offenses that may endanger students.
- Immediate suspension from duties involving student transportation or operation of school vehicles if the offense involves drugs or alcohol.
- Provision of due process for the accused employee.
- Review arrest information to make decisions on the employee's risk to student safety.

b. Employment of Relatives Policy

Employment of Relatives Policy - Custom Class Charter School

1. DEFINITIONS

1.1. **Appointee**: An employee whose salary, wages, pay, or compensation is paid from public funds.
1.2. **Relative**: This includes father, mother, husband, wife, son, daughter, sister, brother, grandfather, grandmother, uncle, aunt, nephew, niece, grandson, granddaughter, first cousin, mother-in-law, father-in-law, brother-in-law, sister-in-law, son-in-law, and daughter-in-law.
1.3. **Household member**: A person who resides in the same residence.

2. PROHIBITED APPOINTMENT

2.1. No Board member or employee of Custom Class may employ, appoint, or recommend the appointment of a relative or household member to any position if the appointee will be directly supervised by a relative or household member, unless:

2.1.1. The appointee is compensated from funds designated for vocational training;
2.1.2. The appointee's employment is for a period of 12 weeks or less;
2.1.3. The appointee is a volunteer as defined by the school; or
2.1.4. The Executive Director determines that the appointee is the only or best-qualified candidate for the position.

3. PROHIBITED SUPERVISION

3.1. No employee of Custom Class may directly supervise an appointee who is a relative or household member, unless:

3.1.1. The appointee was employed before the supervising employee assumed their supervisory role, and the appointment was not unlawful at the time;
3.1.2. The appointee is compensated from funds designated for vocational training;
3.1.3. The appointee's employment is for a period of 12 weeks or less;
3.1.4. The appointee is a volunteer as defined by the school;
3.1.5. The appointee is the only available, qualified, or eligible candidate for the position; or
3.1.6. The Executive Director determines that the employee is the only individual available or best qualified to supervise the appointee.

3.2. If an employee supervises a relative or household member, the employee must disclose the relationship in writing to the Board of Directors. The supervising employee may not evaluate the relative's job performance or recommend salary increases for the relative.

4. ACCEPTANCE OF EMPLOYMENT

4.1. An appointee may not accept or retain employment at Custom Class if they are directly supervised by a relative or household member, unless:

4.1.1. The relative or household member was employed before the appointee assumed their position, and the appointment was not unlawful at the time;
4.1.2. The appointee's employment is for a period of 12 weeks or less;
4.1.3. The appointee is a volunteer as defined by the school;
4.1.4. The appointee is the only available, qualified, or eligible candidate for the position; or
4.1.5. The Executive Director determines that the relative or household member is the only individual available or qualified to supervise the appointee.

5. FEDERAL FUNDS

5.1. The rules prohibiting nepotism apply to employees compensated with public funds, including federal grant funds.

6. GENERAL EXCEPTIONS

6.1. The nepotism rules shall not apply if the following conditions are met:

6.1.1. Fewer than 3,000 people live within a 40-mile radius of the primary place of employment, measured by all-weather public roads;
6.1.2. The job opening has been reasonably advertised to the public; and
6.1.3. The relative is determined to be the best-qualified candidate for the position.

6.2. If a relative is hired under this exception, a written record of the proceedings, including certification from the hiring officer, will be kept in the appointee's personnel file.

c. Employee Evaluation Policy

Employee Evaluation Policy - Custom Class Charter School

LICENSED EMPLOYEE EVALUATION PROCESS

All licensed personnel will be evaluated based on their license designation (LEA-specific, Associate, or Professional) and years of service. Evaluations will align with the **Utah Educator Evaluation Act** (Utah Code 53G-11-507). The Custom Class Educator Evaluation Program will use indicators from the **Utah Effective Teaching Standards**.

DEFINITIONS

- **Formative**: Observations that provide educators with feedback or coaching to improve performance.
- **Summative**: Observations used to make annual decisions regarding educator performance, which may inform salary, employment status, personnel assignments, transfers, or dismissals.
- **Provisional Status**: An employee who has worked for the school on at least a half-time basis for fewer than three consecutive years, as outlined in Utah Code 53G-11-507. Provisional status may be extended by the Executive Director for one or two additional consecutive years.
- **Educator Evaluation**: A system of formative observations using multiple lines of evidence to determine a summative value of educator effectiveness.
- **Certified Rater**: An administrator trained and certified in evaluating educator performance and rating educator effectiveness according to established standards.
- **Learning Walks**: Visits to multiple classrooms by educators and administrators aimed at fostering discussions about teaching and learning to develop a shared vision of high-quality instruction.

EVALUATION REQUIREMENTS

The **Utah Effective Teaching Standards** adopted by the Utah State Board of Education will form the basis of the Custom Class Educator Evaluation Program. Immediate supervisors will conduct multiple formative classroom observations at appropriate intervals before any formal or summative evaluation. A minimum of two formative observations will be required before conducting a summative evaluation.

Educator ratings will be based on observations, student academic growth, and other stakeholder data, aligned with standards and rubrics. Student growth measurement will include learning goals, formative assessments, and targets for incremental monitoring in professional learning teams. Stakeholder input, including feedback from students and parents, will also be incorporated into evaluations.

Summative evaluation scores will be reported using the following terminology:

- **Highly Effective (3)**
- **Effective (2)**

- **Minimal/Emerging Effective (1)**
- **Not Effective (0)**

Supervisors will meet with educators throughout the summative evaluation process, allowing educators opportunities to contribute additional information.

CERTIFIED RATER TRAINING

To ensure valid evaluations, Custom Class will provide **Certified Rater Training** to all raters every three years. This will ensure raters can assess educators in accordance with the **Utah Effective Teaching Standards** (Rule R277-530).

Supervisors must conduct at least one formative observation for every professionally licensed educator in non-summative years. In summative evaluation years, at least two formative observations will be required for educators with Associate or LEA-specific licenses.

FORMAL EVALUATION SCHEDULE

Professionally licensed educators with 1-3 years of experience: Supervisors will conduct formative classroom observations before performing a summative evaluation each year during the three provisional years.

Professionally licensed educators with more than three years of experience (1st year in the LEA): Supervisors will conduct multiple formative observations before performing a summative evaluation during the first year. If the evaluation is satisfactory, the educator may move to the three-year evaluation cycle.

Educators with Associate or LEA-specific licenses: Supervisors will conduct formative observations annually until a professional license is earned. Afterward, the educator will follow the evaluation schedule for professionally licensed educators.

MENTORING AND SUPPORT

Provisional educators and those requiring additional support will be assigned a mentor who will provide guidance. Mentors will not serve as evaluators.

Educators rated as "Not Effective" in any of the Utah Effective Teaching Standards or needing additional support will be placed on a **Professional Development and Improvement Plan**, which will include additional evaluations for at least one year. These educators may be asked to engage in extra professional development, learning walks, or work with a school coach.

A copy of the improvement plan will be provided to the educator and maintained in their personnel file.

EVALUATION REVIEWS AND APPEALS

An educator dissatisfied with a summative evaluation may request a review within 15 days of receiving the written evaluation. The review will be conducted by a certified rater with experience in evaluating educators and not employed by the school. The review will assess the evaluation process, performance data, and stakeholder input, reporting findings to the Executive Director for final action.

STATE REPORTING

Custom Class will report educator evaluation information to the State Superintendent annually by June 30, in compliance with Utah Code 53G-11-511. This data will be classified as private under Utah's **Government Records Access and Management Act**.

CONFIDENTIALITY OF EVALUATION DATA

Educator evaluation records are private and accessible only to the educator's supervisor, those involved in employment decisions, or the Executive Director. Employees will be trained on the importance of confidentiality regarding evaluation records. The school may not disclose student assessment information that reveals educator evaluation data.

CLASSIFIED EMPLOYEE EVALUATION PROCESS

Definition: A "classified employee" is one who works in a position that does not require a Utah educator license.

Classified employees will be evaluated annually using a written evaluation instrument administered by the employee's supervisor. The evaluation will incorporate job duties, attendance, compliance with school policies, and other appropriate criteria.

A copy of the written evaluation will be provided to the employee promptly. Any appeals regarding violations of the evaluation procedure can be submitted under the school's grievance policy.

SECTION 7: Business Plan

BUDGET

Cash Flow Analysis for Preoperational Year and First Two Years of Operation:
The cash flow analysis for Custom Class spans the preoperational year (2025-2026) and the first two operational years (2026-2027 and 2027-2028), offering insights into the financial planning and assumptions guiding the school's development. A high-level, cash flow analysis for each of these years is highlighted in Table 1, for our fully projected enrollment, and Table 2, for our break-even enrollment. Further details provided in the following paragraphs.

	Preoperational 2025-2026	**Year 1** 2026-2027	**Year 2** 2027-2028
Revenues	$602,500	$4,310,731	$5,914,812
Expenditures	$569,597	$3,737,862	$4,892,512
Net Cash Flow	$32,903 (5%)	$572,869 (13%)	$1,022,300 (17%)

Table 1. Cash flow summary for the preoperational and first two operational years for full enrollment projections of 400 and 560 students, respectively.

In the preoperational year, Custom Class anticipates total revenue of $602,500, primarily sourced from state grants, including the Charter School Startup and Implementation Grant and the Charter School Revolving Loan. This funding is intended to cover the foundational costs of launching the school, ensuring that key administrative roles and essential planning activities are adequately funded before the school opens. Total expenditures in the preoperational year are estimated at $569,597, leaving a modest net asset balance of $32,903, which accounts for 5% of revenue set aside as reserves. Expenditures include $238,500 allocated for staff salaries, covering both administrative roles and instructional planning. An additional $71,550 is budgeted for employee benefits such as retirement and medical insurance. Further, $25,000 is reserved for property-related costs, to cover rental fees for a portion of the year to set up our first family service center. This financial planning ensures that the school will have adequate resources to establish its systems and hire key personnel before the first year of student enrollment.

Moving into the first operational year (2026-2027), revenue projections rise significantly with an anticipated 400 students enrolled, bringing total revenue to $4,310,731 at full enrollment. The expenditure side for the first operational year is dominated by staff salaries, with $1,578,000 allocated at full enrollment. Benefits and other essential costs, such as professional services and adding additional facility-related expenses, are also carefully scaled to meet the demands of both full and partial enrollment. At full enrollment, total expenditures are expected to reach $3,737,862, leaving a healthy net asset balance of $572,869 (13% of revenue). This financial buffer demonstrates prudent fiscal planning, enabling the school to maintain a strong reserve while still providing high-quality education services. In the break-even enrollment budget we

prepared, the school still expects a surplus of $102,764, ensuring that even in a scenario with lower than half of the expected enrollment, the school remains fiscally sound with more than 5% put towards reserves. A true break-even when there is no surplus is found at 184 students. break-even budget projections are described in a section below.

The second operational year (2027-2028) anticipates further growth, with projected enrollment rising to 560 students, leading to expected revenue of $5,914,812. As in year one, the budget is built to scale, with a break-even point of less than half of this maximum enrollment. This careful planning ensures that Custom Class can expand its operations to meet growing demand without jeopardizing financial stability. In this second year, salaries rise to $2,042,000 at full enrollment, with corresponding increases in benefits, instructional support, and more physical locations to meet enrollment needs. The school's debt service obligations, including repayments on the Charter School Revolving Loan, begin in earnest during this year, with an estimated $72,165 allocated for principal repayment, in addition to the $6,797 in interest payments. Despite these increased costs, the school anticipates ending the second operational year with a strong net asset balance of $1,022,300, or 17% of revenue, further building on its financial reserves.

The key financial assumptions driving this analysis include a focus on enrollment-driven revenue, where state funding plays a central role based on the provided budgetary template. The school’s conservative approach to cost management, particularly in salary and benefits, ensures that it remains flexible in scaling operations based on actual enrollment. Debt repayment is carefully structured to allow for growth while maintaining fiscal stability, with interest-only payments in the first operational year, followed by principal repayments in subsequent years. Prudent management of facilities costs for Family Service Centers and other expenditures further enhances the school’s financial health, ensuring that resources are allocated effectively to support the educational mission.

In terms of alignment with the school’s educational program, fiscal priorities focus heavily on staffing, instructional support and supplies ensuring that the school can deliver high-quality, personalized education while maintaining operational efficiency. Facility-related costs are carefully managed, reflecting the school’s commitment to providing options for a student’s most supportive learning environment without overextending its budget. This alignment between fiscal management and educational priorities ensures that Custom Class is well-positioned to meet its goals, even in the face of potential financial challenges.

The cash flow analysis for Custom Class demonstrates a robust and flexible financial plan that supports both its educational goals and long-term financial sustainability. The school’s ability to adjust to different enrollment scenarios, coupled with careful management of debt and reserves, ensures that it can grow and thrive while delivering a high-quality educational experience. Our entire budget along with projected and break-even enrollments for each year can be found in **Appendix M: Custom Class Budget 2025-2028.**

Contingency Plans for Cash Flow Challenges:
Custom Class has developed comprehensive contingency plans to address potential cash flow challenges. The school recognizes that various unforeseen circumstances—such as

lower-than-expected student enrollment, unexpected increases in operational costs, or delays in receiving state and federal funding—could occur during the early years of operation. To mitigate these risks, the school will employ the following strategies:

1. **Cutting Non-Essential Costs**: In the event of a cash flow shortfall, the school will first reduce discretionary expenses such as professional development travel, non-urgent equipment purchases, and extracurricular activities. Essential instructional services and student support will remain a priority.
2. **Restructuring Staffing Levels**: In the case of significantly lower-than-expected enrollment, the school will adjust staffing levels to align with the actual number of students. This could include hiring fewer instructional staff or adjusting part-time positions to reflect lower demand.
3. **Leverage Loan and Grant Opportunities**: If needed, the school will pursue additional financial support through state loan programs, grants, and private donations to stabilize cash flow.
4. **Reserve Fund**: Custom Class will aim to build a reserve fund in the early years, targeting at least 5-7% of annual expenses to cover any unanticipated shortfalls. This reserve will be maintained as a buffer for emergencies, allowing the school to continue its operations smoothly despite any cash flow disruptions.

Break-Even Enrollment Count:
The break-even enrollment count for Custom Class is projected to be at 184 students to truly break-even in the first operational year. This figure was determined based on a detailed analysis of fixed and variable costs. We decided to prepare our break-even budgets with 196 students for Year 1 and 240 students for Year 2 which allows us to keep the recommended 5% for reserves. However, at only 184 students, the school will generate enough revenue to cover all essential operating expenses without any surplus. This enrollment figure is much lower than our projected starting enrollment of 400 students, providing a buffer to ensure the school's financial viability even if enrollment targets are not fully met.

	Preoperational 2025-2026	**Year 1** 2026-2027	**Year 2** 2027-2028
Revenues	$602,500	$2,250,159	$2,552,178
Expenditures	$569,597	$2,143,497	$2,426,162
Net Cash Flow	$32,903 (5%)	$106,662 (5%)	$130,808 (5%)

Table 2. Cash flow summary for the preoperational and first two operational years for full enrollment projections for our "break-even" enrollment budget projections of 196 and 240 students, respectively, where these enrollments allow us to retain the desired 5% for reserves. True break-even points where there is no surplus are at 184 and 223 students, respectively.

Financial Priorities and Alignment with Mission:
Custom Class's financial priorities are carefully structured to support its core mission of

providing a personalized, mastery-based educational experience while ensuring operational sustainability and long-term growth. The key financial priorities outlined in the budget documents are as follows:

- **Investing in Staffing**: A major financial priority for the school is ensuring that highly qualified educators and support staff are hired and retained. This is reflected in the significant allocation toward salaries and benefits. In the preoperational year, $238,500 is allocated for staff salaries, ensuring that the leadership and instructional planning teams are in place. In the first operational year, at full enrollment, $1,578,000 is dedicated to teacher salaries alone, with an additional $435,750 for employee benefits. By ensuring that a strong staff is in place, the school is well-positioned to provide the personalized learning paths central to its mission.
- **Focus on Personalized Learning**: The school's financial model reflects its commitment to personalized education. This is evident in the funding dedicated to professional development and instructional support, ensuring that teachers are equipped to deliver customized learning experiences. The budget allocates significant resources to curriculum options and instructional materials, allowing the school to tailor its educational content to meet the unique needs of each student.
- **Facility and Infrastructure Development**: While Custom Class's educational model emphasizes flexible learning environments, the school has allocated funds to ensure that it has the necessary administrative and instructional spaces to support its mission. In the first operational year, $50,000 is set aside for property-related costs, and additional amounts for furniture, maker space equipment, and insurance ensuring that the school has a suitable administrative base. This will scale up as needed to meet the needs of enrolling students. By focusing on lean but effective facilities, the school can redirect additional resources to key educational elements such as staffing and curriculum.
- **Reserves and Financial Stability**: Another key financial priority is ensuring that the school maintains adequate reserves to manage any unforeseen challenges or fluctuations in enrollment. The preoperational year budget includes a reserve of $32,903, and the first operational year budget has a net asset balance of $618,569, which represents 14% of total revenue. These reserves are critical for maintaining financial stability and flexibility, ensuring that the school can continue to operate smoothly even in the face of unexpected events.

In alignment with the school's mission, these financial priorities ensure that the resources are focused on delivering high-quality education while maintaining operational efficiency and financial stability.

Realistic Revenue and Expenditure Assumptions for the First Three Fiscal Years:
Custom Class's revenue assumptions for the first three fiscal years are based on conservative estimates for state and federal funding, adjusted for both full enrollment and break-even enrollment scenarios. The school anticipates receiving state funding based on per-pupil allocations and federal for Title I and special education. The school will also apply for startup grants and the Utah Charter School Revolving Loan to cover initial operating costs.

Expenditures are carefully projected to match anticipated revenue, with teacher salaries, student instructional technology and materials comprising the largest portions of the budget. The school's leadership will continuously monitor expenditures, adjusting the staffing plan and other costs as needed to ensure alignment with actual enrollment figures. For example, in the event of lower-than-expected enrollment, the school will reduce its hiring of non-essential staff and delay certain discretionary expenditures until revenue levels increase.

Understanding of Facilities Acquisition and Financing Options:
Custom Class has explored multiple options for facilities acquisition for our family service center sites across the state. The school plans to lease office space in the preoperational year to house administrative staff and store student materials and technology. In the operational years we will aim to provide spaces for Family Service Centers within an hour drive of 85% of our students. The school's leadership has a clear understanding of the requirements for facility E-occupancy and acquisition through consultations with the Fire Marshal's office, commercial real estate experts, and legislators. This includes the importance of maintaining flexibility in space planning to accommodate enrollment growth over time. A sample of these properties are included as **Appendix L: Statewide Family Service Center Lease Options**

Viable Strategies for Meeting Budget and Cash Flow Challenges:
To mitigate potential budget and cash flow challenges in the first three fiscal years, Custom Class will implement several proactive strategies:

- **Cash Reserves**: The school will build a reserve fund during the first operational year, aiming for a reserve of at least 5-7% of annual expenditures. This will provide a financial buffer in case of unforeseen expenses or revenue shortfalls.
- **Conservative Budgeting**: The school's budget is built on conservative revenue estimates, ensuring that actual funding levels are likely to meet or exceed projections. This approach provides additional flexibility in managing expenditures.
- **Staffing Adjustments**: The school's staffing plan is designed to be scalable, allowing for adjustments in staffing levels based on actual enrollment figures. In the event of lower-than-expected enrollment, the school will delay hiring additional staff until revenue levels are sufficient.
- **Cost Reduction Plans**: The school has identified non-essential costs that can be reduced or eliminated in the event of a budget shortfall, including professional development travel, technology upgrades, and non-essential administrative expenses.

Commitment to Financial Viability
Custom Class is fully committed to maintaining financial viability and ensuring the long-term success of the school. The leadership team, including the BA and Executive Director, will work closely with the governing board to monitor the school's financial health, making adjustments as necessary to ensure that the school operates within its means. The school will prioritize transparency in financial reporting, ensuring that all stakeholders, including the board and the Utah State Office of Education, have access to accurate and timely financial data.

In addition, the school will continue to explore new funding opportunities, including grants and partnerships with community organizations, to enhance its financial stability. By maintaining a strong focus on financial stewardship and accountability, Custom Class will ensure that it can continue to provide high-quality education to its students for years to come

FINANCE

Systems and Procedures for Managing the School's Finances:
Custom Class will have robust systems and procedures in place for managing its finances to ensure transparency, accountability, and compliance with state and federal regulations. The financial operations of the school will be overseen by the BA, with additional support provided by a financial secretary. Together, they will manage all financial functions, including budgeting, accounting, payroll, procurement, and financial reporting. The school will adopt industry-standard financial management software to maintain accurate records and ensure that all transactions are properly recorded and reported.

To maintain fiscal responsibility, Custom Class will implement the following procedures:

- **Monthly budget reviews**: The BA will prepare monthly financial reports for review by the Executive Director and the Board of Directors. These reviews will include analysis of revenue, expenses, and cash flow to ensure that the school stays within its budget and can make informed financial decisions.
- **Segregation of duties**: No single individual will control all aspects of financial transactions. This system of checks and balances will prevent fraud and ensure accuracy in the school's financial records.
- **Procurement process**: The school will utilize a purchase order system for managing purchases. All requisitions will require approval by the Executive Director or BA, ensuring that expenditures are aligned with the budget and the school's financial priorities.

Additionally, the Board of Directors will be involved in overseeing the financial management of the school. The Board Treasurer, appointed by the Board, will regularly review financial activities and ensure that the Executive Director and BA are adhering to the approved budget and financial policies. The Board Treasurer will also ensure that all financial reports are submitted in a timely manner to the Utah State Office of Education and other relevant state entities.

Responsibility for Financial and Student Record Management:
The BA will be responsible for managing the school's financial records, while the registrar will oversee the management of student records, including attendance, enrollment, and eligibility tracking for programs for grants and other programs such as special education and English Learner (EL) services.

The BA, financial secretary, and registrar will utilize secure, cloud-based financial and student information systems that comply with Family Educational Rights and Privacy Act (FERPA) and Health Insurance Portability and Accountability Act (HIPAA) standards. Access to these systems

will be restricted to authorized personnel, ensuring both the protection and accuracy of student and financial records.

Provisions for an Annual Audit (Consistent with LEA Status):
Custom Class will contract with an independent accounting firm to conduct an annual audit of its financial statements, consistent with its LEA status. This audit will assess the school's compliance with state and federal financial regulations, the accuracy of its financial reporting, and the effectiveness of its internal financial controls. The results of the audit will be submitted to the USBE, and any comments or concerns arising from the audit will be addressed by the Executive Director and BA. The Board of Directors will ensure that the management team acts on any findings from the audit and reports progress during Board meetings.

Development and Dissemination of an Annual Financial Report:
Custom Class will prepare and disseminate an **annual financial report** detailing the school's financial performance. This report will include a summary of revenue, expenses, and key financial metrics, and will be shared with the Board of Directors, parents, and the broader school community. The report will ensure transparency and provide an opportunity for stakeholders to understand how financial resources are being used to support the school's educational mission.

Liability Insurance for Tort Claims:
Custom Class will secure comprehensive liability insurance to protect the school, its Board, staff, and teachers against tort claims. This insurance will include general liability, professional liability, directors and officers (D&O) insurance, and other coverage necessary to mitigate financial and legal risks. The Board Treasurer will ensure that the school maintains adequate insurance coverage and renews policies as needed.

Adherence to Generally Accepted Accounting Practices (GAAP):
Custom Class is committed to adhering to Generally Accepted Accounting Principles (GAAP) in all of its financial operations. By following GAAP, the school ensures that its financial reporting is transparent, consistent, and in compliance with best practices. The BA will work closely with the governing board and external auditors to ensure that the financial procedures and reporting mechanisms are in line with GAAP standards.

The BA will be responsible for implementing financial procedures such as:

- **Accrual-based accounting**, where revenues and expenses are recorded when earned or incurred, rather than when cash is received or paid.
- **Internal controls** to safeguard assets and ensure accurate reporting, including the separation of duties, approval processes for expenditures, and monthly reconciliations of bank accounts.
- **Regular financial reviews** to monitor cash flow, budget performance, and adherence to financial policies.

Policies for Enrollment, Attendance, and Program Tracking:
Custom Class will have detailed policies and procedures in place to track student enrollment,

attendance, and participation in school programs, including students with disabilities (SWD) and English Learners (ELs). The registrar, in coordination with the BA and other administrative staff, will ensure that all necessary data is collected, maintained, and reported in compliance with state and federal regulations.

The school's Student Information System (SIS) will be used to track enrollment and attendance data in real-time, allowing for accurate reporting and monitoring. This data will be essential for funding applications, ensuring eligibility for federal and state grants, and tracking compliance with IEPs and other program requirements. Attendance will largely use learner validated attendance systems which focus more on learner's participation and demonstrated competency, rather than traditional metrics. This will allow for year-round participation in flexible terms as well as accurate accounting of average daily membership.

Financial Management Obligations:
Custom Class is fully prepared to meet its financial management obligations, including the completion of an annual independent audit, preparation of an Audited Financial Report (AFR), and securing appropriate insurance coverage. The school's BA will work closely with external auditors to ensure that the school's financial records are accurate and in compliance with state and federal regulations.

Annual Audit: The BA will ensure that the annual audit is conducted by an independent, certified accounting firm, and that the audit report is submitted to the USBE by the required deadlines. Any findings or recommendations from the audit will be addressed by the Executive Director and BA, with progress reported to the Board of Directors.

Audited Financial Report: The school will submit its Audited Financial Report annually to the state, summarizing the results of the audit and providing a detailed account of the school's financial performance.

Insurance Requirements: The school will maintain adequate insurance coverage to protect against risks related to school operations, including property damage, liability claims, and employee-related risks. The Board Treasurer will ensure that insurance policies are reviewed and renewed annually to maintain compliance with state regulations.

Administration of Grants and Federal Programs:
Custom Class will administer any grants or federal programs in accordance with all applicable guidelines. The BA will oversee the management and reporting of all grant funds, ensuring compliance with Title I for economically disadvantaged students, IDEA for students with disabilities, and other federal programs. The BA will be responsible for ensuring that all funds are used in alignment with program requirements, and that all necessary reports are submitted to the relevant authorities in a timely manner.

Grant administration procedures will include:

- **Clear tracking of expenditures** to ensure compliance with grant requirements.

- **Training for staff** involved in grant-funded programs to ensure that they are aware of the guidelines and can implement the programs effectively.
- **Timely submission of reports** to ensure that the school meets all federal and state deadlines including those within the Utah Grants platform.

Custom Class is committed to ensuring that all financial practices adhere to state and federal guidelines, maintaining the financial viability of the school while supporting its mission to deliver high-quality, personalized education.

FACILITIES

Facility Needs Based on Educational Program and Enrollment:
Custom Class's innovative educational program is designed to meet the unique needs of a diverse student population through personalized, mastery-based learning. To support this model and the anticipated enrollment, the school will require flexible, multi-functional spaces to accommodate various aspects of the program, including tutoring, counseling, wellness programs, and creative labs such as maker spaces. Given that the majority of our student interactions will occur online, the physical facilities will primarily serve as family service centers where students can access in-person support when needed. These centers will focus on key elements such as student wellness, counseling, collaboration, and hands-on learning opportunities such as makerspace equipment and materials..

Our facility needs will include spaces that are conveniently located within an hour's drive of 85% of our students, ensuring accessibility for most families while accommodating those who may require in-person support. The physical locations will provide opportunities for students to collaborate in person on projects, access counseling services, develop Utah's Portrait of a Graduate skills, and receive specialized tutoring or academic support as needed. These spaces will also host workshops and events to encourage student engagement and community building.

Potential Facilities Description:
We have identified several potential facility options within different regions of the state. These facilities include rental spaces in office complexes that offer the necessary infrastructure for tutoring rooms, counseling offices, collaborative maker spaces, and administrative support areas. The envisioned layout would include:

- **Tutoring rooms**: Flexible spaces that can be adapted for group or one-on-one tutoring sessions, providing a quiet and supportive environment for academic progress.
- **Counseling and wellness areas**: Private rooms where students can meet with counselors and wellness professionals to address mental health and well-being as well as spaces that promote physical wellness.
- **Maker spaces**: Creative workshops where students can engage in hands-on learning projects, such as robotics, 3D printing, and other STEAM-related activities, allowing them to apply the concepts learned online in a physical space.
- **Administrative offices**: Areas for staff to meet, manage records, and provide in-person support to students and families.

- **Community spaces**: Open areas for events, workshops, and student-driven activities that promote collaboration and engagement.

Meeting the Needs of Students, Including Accessibility:
The selected facilities will be designed to meet the needs of all students, including those with physical disabilities. All spaces will comply with the Americans with Disabilities Act, ensuring accessibility for students and families with mobility challenges. This includes wheelchair-accessible entrances, elevators (if necessary), restrooms, and appropriate seating arrangements in all areas of the facility.

These facilities will also provide a welcoming and inclusive environment that meets the diverse needs of our student body. Special accommodations will be made to ensure that students with disabilities can fully participate in all programs and activities offered in these spaces, whether they are academic, social, or creative.

Lease or Purchase Terms and Agreements:
Custom Class is currently in discussions with Neil Walter and NAI Excel, both reputable real estate firms specializing in educational and commercial properties. While no draft agreements have been signed yet, initial consultations have been positive, and we anticipate formalizing agreements as soon as the school's final facility needs are determined.

Our goal is to secure lease agreements for the family service centers that ensure stability and consistency for students and staff. The terms will likely include flexible leasing options to accommodate our anticipated growth, allowing for additional space as the school expands its services and increases enrollment.

Renovation or Build-Out Plans:
If the selected facility requires renovation or build-out, the primary focus will be on adapting the space for tutoring, counseling, and maker space activities. This may include creating additional rooms for private counseling sessions, soundproofing tutoring spaces to maintain a quiet learning environment, and outfitting maker spaces with the necessary tools and technology for hands-on learning projects.

The anticipated build-out cost for these renovations will be included in our facility budget, and we plan to complete any necessary work before Spring 2026 to ensure the space is fully functional by the time student services begin. The renovations will be minimal, focusing primarily on reconfiguring existing spaces rather than major construction projects, ensuring that costs and timelines remain manageable.

Facility Selection Process and Timeline:
Custom Class will follow a rigorous facility selection process to ensure the chosen space meets all educational and operational needs. The process will involve identifying potential locations, conducting site visits, and working with real estate professionals to secure an optimal space.

The timeline for facility selection and occupancy is as follows:

- **By Summer 2025**: Identify and evaluate potential locations, initiate lease negotiations.
- **By Fall 2025**: Secure the lease agreement, begin any necessary renovations or build-outs.
- **By Spring 2026**: Complete renovations and move into the facility, ready for occupancy.
- **By Summer 2026**: Fully operational facility in place for the upcoming school year.

This timeline ensures that the facility will be ready to meet the needs of students by the time they are anticipated to use the family service center regularly.

Compliance with E-Occupancy Requirements:
All facilities under consideration for Custom Class will meet e-occupancy requirements as dictated by the state of Utah. We have engaged in discussions with the Fire Marshal's office to ensure that any selected buildings comply with fire safety codes, including provisions for fire alarms, sprinklers, emergency exits, and evacuation plans. These requirements will be verified prior to signing any lease agreements, ensuring that the safety and well-being of our students and staff are prioritized.

Knowledge of Facility Costs:
Custom Class has researched the costs associated with leasing, renovating, and maintaining facilities that meet our needs. Based on estimates from Neil Walter and NAI Excel, we expect facility-related costs to include:

- **Lease payments**: Based on the size and location of the facility, monthly lease costs will vary but are expected to fall within the range outlined in our financial projections.
- **Furniture and equipment expenses**: Estimated at up to $55,000, depending on what each family service center requires to prepare the space for all services.
- **Insurance and maintenance costs:** We have budgeted for triple net lease costs, property insurance, general liability insurance, and maintenance services to ensure that the facility remains in good condition and is protected against potential risks.

These costs are reflected in our budget assumptions, ensuring that the facility expenses align with the overall financial plan for the school.

Facility Budget Assumptions:
The facility budget includes realistic assumptions about the costs of leasing, utilities, renovations, and ongoing maintenance. We have accounted for flexible leasing terms that allow for growth in student enrollment and usage over time. The break-even enrollment for our facility plan has been calculated based on the number of students we expect to serve in the first operational year, ensuring that we remain financially viable while providing necessary in-person services to students.

In the event that additional funding is needed for unforeseen renovation or facility-related expenses, Custom Class will explore options for capital financing through charter school bonds or grants that are specifically designated for facilities and infrastructure.

Adequacy of the Facility:
Custom Class is committed to ensuring that the selected facility is adequate and appropriate for our educational program and target population. Given the hybrid nature of our model, the facility will not need to accommodate large numbers of students on a daily basis, but it will serve as an important hub for academic support and student engagement.

To ensure the facility meets the needs of the student population, we will maintain a student-to-space ratio that allows for effective use of the tutoring, counseling, and maker space areas. Our projected enrollment figures have been factored into the facility plan, and we are confident that the selected spaces will provide the resources and support necessary to enhance the student experience.

Financial Viability of the Facility Plan:
The facility plan for Custom Class is financially viable, with projected costs falling within the parameters of the school's overall budget. We have prioritized cost-effective solutions that maximize the utility of the facility while minimizing unnecessary expenses. The school's financial reserves and contingency plans also provide a buffer against any unexpected costs related to the facility.

The flexibility in our facility approach, combined with a well-researched understanding of costs, ensures that the plan is sustainable and aligns with our mission of delivering personalized, high-quality education to our students.

PRE-OPENING PLAN

Custom Class's pre-opening plan outlines the critical tasks to be completed between the approval of the charter application and the school's opening in August 2026. This plan includes essential elements such as policy implementation, financial management systems, student data and reporting systems, staff recruitment, and curriculum development. The primary responsibility for each task is assigned to specific individuals or positions, ensuring accountability and efficiency throughout the pre-opening phase. The table below provides a detailed schedule of key tasks, responsible individuals, and required resources.

Pre-Opening Key Tasks and Responsibilities:

Recruiting Students

- **Task Initiation**: August 2025
- **Task Development**: Ongoing outreach through social media, local events, and partnerships with community organizations.
- **Task Completion**: July 2026
- **Primarily Responsible**: Executive Director, Marketing Professional Services
- **Anticipated Resources**: Marketing materials, advertising budget, enrollment management system

Implementation of Required Policies

- **Task Initiation**: September 2025
- **Task Development**: Drafting and approval of school policies, including student conduct, attendance, special education, and equity.
- **Task Completion**: March 2026
- **Primarily Responsible**: Board of Directors, Executive Director, BA
- **Anticipated Resources**: Legal consultation, policy templates, Board review meetings

Student Data Systems (Aspire)

- **Task Initiation**: November 2025
- **Task Development**: Implementation of the Aspire student information system (SIS) for enrollment, attendance tracking, and reporting.
- **Task Completion**: June 2026
- **Primarily Responsible**: Executive Director, Secretary/Registrar, IT Professional Service
- **Anticipated Resources**: Aspire system setup, IT support, staff training

Reporting Systems

- **Task Initiation**: November 2025
- **Task Development**: Establish reporting protocols for state and federal compliance, including attendance, academic progress, and special programs.
- **Task Completion**: July 2026
- **Primarily Responsible**: BA, Executive Director
- **Anticipated Resources**: Compliance guidelines, reporting software, training

Financial Management Systems

- **Task Initiation**: October 2025
- **Task Development**: Implement financial systems for budgeting, payroll, procurement, and financial reporting. Establish a process for ongoing financial oversight by the Board.
- **Task Completion**: March 2026
- **Primarily Responsible**: BA, Board Treasurer, Financial Secretary
- **Anticipated Resources**: Financial management software, external auditing services, staff training

Hiring of Staff

- **Task Initiation**: January 2026
- **Task Development**: Recruitment, interviews, and selection of teachers and administrative staff. Onboarding process to ensure all hires are trained in the school's educational model.
- **Task Completion**: June 2026
- **Primarily Responsible**: Executive Director
- **Anticipated Resources**: Job postings, interview panels, onboarding tools

Building and Facilities

- **Task Initiation**: October 2025
- **Task Development**: Lease agreements finalized, and any necessary facility modifications (*e.g.*, tutoring, counseling, maker spaces) completed.
- **Task Completion**: May 2026
- **Primarily Responsible**: Executive Director, BA
- **Anticipated Resources**: Real estate consultation, renovation contractors, permits, and inspections

Curriculum Contracts

- **Task Initiation**: November 2025
- **Task Development**: Finalize curriculum contracts for core subjects and personalized learning modules. Ensure all instructional materials align with Utah Core Standards.
- **Task Completion**: April 2026
- **Primarily Responsible**: Executive Director, Teachers
- **Anticipated Resources**: Curriculum providers, contracts, review and approval processes

Pre-Opening Schedule Overview:

Task	Initiation	Development	Completion	Primarily Responsible	Anticipated Resources
Recruiting Students	October 2025	Ongoing outreach	July 2026	Executive Director	Marketing materials, advertising budget
Implementation of Required Policies	September 2025	Drafting & approval	March 2026	Board, Executive Director, BA	Legal consultation, Board meetings
Student Data Systems (Aspire)	November 2025	System setup	June 2026	Executive Director	Aspire system setup, IT support
Reporting Systems	November 2025	Establish reporting protocols	July 2026	BA, Executive Director	Compliance guidelines, reporting software

Financial Management Systems	October 2025	Implement systems	March 2026	BA, Board Treasurer	Financial software, external audit services
Hiring of Staff	January 2026	Recruitment & interviews	June 2026	Executive Director,	Job postings, interview panels
Building and Facilities	October 2025	Lease agreements, build-out	May 2026	Executive Director, BA	Real estate, contractors, permits
Curriculum Contracts	November 2025	Finalize & review	April 2026	Executive Director, Teachers	Curriculum providers, review

Key Pre-Opening Tasks and Resource Needs:

- **Recruiting Students**: The school will launch a comprehensive marketing campaign to recruit students, utilizing online platforms, social media, community partnerships, and local events to reach families. Marketing materials, such as flyers, advertisements, and informational sessions, will be essential to generate interest and attract prospective students. A student enrollment system will be set up to track applications/enrollments.
- **Implementation of Required Policies**: The Board and Executive Director will finalize school policies on issues such as attendance, student conduct, special education, and data privacy. Legal consultation will ensure that all policies comply with state and federal regulations. Policies will be reviewed and approved at Board meetings.
- **Student Data Systems (Aspire)**: The Aspire system will be implemented to manage student enrollment, attendance, and academic progress. The IT team will ensure that the system is operational and that staff are trained to use it effectively. The system will be integrated with state reporting requirements to facilitate compliance.
- **Reporting Systems**: The financial and operational reporting systems will be put in place to ensure that the school meets its state and federal reporting obligations. Staff will receive training on how to generate required reports on student achievement, financial health, and other key performance indicators.
- **Financial Management Systems**: The BA will implement financial management software for budgeting, payroll, and procurement. These systems will be aligned with the school's budget to ensure sound fiscal management. An external auditing firm will be contracted to conduct annual audits and ensure compliance with Generally Accepted Accounting Principles (GAAP).

- **Hiring of Staff**: A comprehensive recruitment strategy will be rolled out to attract highly qualified teachers and support staff who align with Custom Class's mission. The Executive Director will oversee the hiring process, and all new staff members will undergo onboarding and training in mastery-based education, personalized learning, and online instruction.
- **Building and Facilities**: The Executive Director and BA will secure appropriate facilities to serve as family service centers. Renovations, if necessary, will focus on creating spaces for tutoring, wellness, counseling, and maker-space activities. Real estate consultations and contractor bids will be reviewed, and final agreements will be signed by Spring 2026.
- **Curriculum Contracts**: Contracts with curriculum providers will be finalized to ensure that all instructional materials align with state standards and support the school's personalized learning model. Review processes will involve input from teachers to ensure that the curriculum supports student engagement and mastery-based learning.

Resource Allocation for Pre-Opening Tasks:
Each of the tasks above has been carefully considered in terms of resource needs. Funding for marketing, staff recruitment, curriculum contracts, and facility improvements has been allocated in the pre-operational budget. Technology needs for data systems, financial management, and reporting are included as part of the IT infrastructure investment.

By coordinating these efforts efficiently and ensuring that key stakeholders are held accountable, Custom Class will be fully prepared for a successful opening in August 2026, providing a seamless transition from planning to implementation.

CLOSURE PLAN

Custom Class recognizes the importance of being fully prepared for any potential closure scenario, whether it be due to a voluntary decision by the school or as a result of charter termination by the USBE or the State Charter School Board. This plan outlines the steps and responsibilities involved in the event of a closure, ensuring that the needs of students, staff, and stakeholders are addressed effectively and in compliance with all legal requirements.

Key Tasks in the Event of Charter Termination or Surrender:
If Custom Class's charter is terminated or voluntarily surrendered, several critical tasks will need to be completed to ensure a smooth and orderly closure. These tasks include notifying stakeholders, transferring student records, liquidating assets, and preparing final financial reports. The closure process will be designed to minimize disruptions to students' education while ensuring legal and regulatory compliance. Key tasks include:

- **Notification to Stakeholders**: The school community, including students, families, staff, and community partners, will be promptly informed of the closure through email, physical

letters, and website announcements. The Utah State Charter School Board will collaborate with the school to ensure effective communication.
- **Transfer of Student Records**: Student records, including IEPs, attendance records, and transcripts, will be transferred to the receiving schools or the district in which the student resides.
- **Financial and Asset Liquidation**: A complete inventory of assets will be conducted, and steps will be taken to liquidate or transfer assets in compliance with federal and state regulations. Any debts will be paid, and remaining assets will be disposed of according to state law.

Self-Evaluation Process:
To ensure ongoing compliance and quality education, Custom Class will implement a self-evaluation process based on the minimum standards and specific performance targets established by the Board of Directors. This process will be conducted annually and involve the following steps:

- **Individuals Responsible**: The Executive Director and a committee of board members will oversee the evaluation process.
- **Frequency**: Self-evaluations will occur annually, with interim progress reviews every quarter.
- **Action Plan**: Following each evaluation, an action plan will be developed to address any areas of concern. Milestones and deadlines will be set for implementing improvements.
- **Notification to Authorizer**: If the school is at risk of not meeting any performance or financial targets, the authorizer will be notified immediately to allow for timely intervention.

Dissemination of Evaluation Results:
Results from the annual self-evaluation will be disseminated to key stakeholders, including staff, parents, and community members. This dissemination will occur via:

- **Annual Reports**: The school will publish an annual report summarizing its academic performance, financial health, and overall progress toward its mission and goals. This report will be available on the school's website and shared at board meetings.
- **Parent Communication**: Parents will receive updates through newsletters and parent-teacher meetings, ensuring transparency in how the school is performing and addressing challenges.

Support for Students and Families During Closure:
In the event of closure, Custom Class will prioritize providing comprehensive support to students and their families. This support will include:

- **School Choice Assistance**: The school will help families identify alternative educational options, providing information about neighboring district schools, charter schools, and private institutions.
- **Records Transfer**: The school will facilitate the transfer of student records to ensure seamless registration at new schools. Follow-up will occur during the subsequent school year to ensure all students are properly enrolled.
- **Individualized Support**: Counseling and transition support services will be offered to students with special needs and their families to ensure they find appropriate educational placements.

Support for Employees During Closure:
Custom Class is committed to providing adequate support to employees in the event of closure. This will include:

- **Job Search Assistance**: The school will assist employees in finding new positions by offering resume workshops, references, and job placement services. Partnerships with local districts and other charter schools will be leveraged to facilitate smooth transitions.
- **Compensation and Benefits**: Employees will be informed of the timeline for their final paychecks, COBRA benefits, and other employment-related matters, ensuring they have adequate information to transition to new employment.

Records Archiving and Maintenance:
Custom Class will appoint a Registrar to oversee the archiving and maintenance of student and employment records in accordance with Utah law (53G-5-403) and federal regulations (34 CFR 80.32). The Registrar will ensure that:

- **Student Records**: All student records, including IEPs, transcripts, and attendance records, are securely transferred to receiving schools or districts.
- **Employee Records**: Employment records will be maintained and made accessible to former employees as needed for future employment verification.
- **Archiving**: Records will be archived with the Utah State Archives for long-term retention in compliance with the Government Records Access and Management Act (GRAMA).

Continued Submission of Required Reports:
Even after closure, Custom Class will continue to fulfill all reporting obligations. The **BA** and **Registrar** will be responsible for:

- **Final Financial Audit**: Conducting and submitting a final audit to the USBE and ensuring that all financial records are in order.

- **Grant Reports**: Completing any outstanding grant reports and ensuring that federal funds are accounted for.
- **End-of-Year Reports**: Submitting final attendance, academic performance, and enrollment reports to the necessary state and federal agencies.

Appointed Individuals for Closure Tasks:
The following individuals will be appointed to ensure the closure process is completed effectively:

- **Executive Director**: Will oversee the overall closure process, including communication with stakeholders and compliance with state and federal regulations.
- **Registrar**: Will handle student record transfers, archiving, and ensuring compliance with record retention requirements.
- **BA**: Will manage financial audits, asset liquidation, and final reporting obligations.

Closure Reserves:
Custom Class has budgeted for closure-related costs, with a reserve fund of $75,000 allocated in the school's financial plan. These funds will be used to cover the costs associated with record transfers, legal fees, final audits, and other necessary closure activities. This ensures that the school can close in an orderly and responsible manner, even in the event of unforeseen financial difficulties.

Custom Class’s closure plan ensures that all necessary tasks will be completed in compliance with state and federal regulations, and with the least possible disruption to students and their families. The school's Board and leadership are fully prepared to take the appropriate steps to protect stakeholders’ interests and ensure a smooth transition for all involved parties.

SECTION 8: Contracts

Custom Class has not entered into any contracts, binding or otherwise, prior to the submission of this application and does not intend to contract with an education service provider directly after approval. Any contracts we enter into in the future will follow state law for procurement as outlined in 63G-6a and all related board rules for the use of third party providers.

Appendices

APPENDIX A: Background Information Sheets

APPENDIX B: Articles of Incorporation

APPENDIX C: Governing Board Bylaws

APPENDIX D: Minutes from Governing Board Meetings

APPENDIX G: Start-Up Grant Application

APPENDIX I: Utah Portrait of a Graduate Competency Model Rubrics

APPENDIX J: Learning Goals and Success Criteria Templates

APPENDIX K: USBE Next Generation School Accountability Report

APPENDIX L: Statewide Family Service Center Lease Options

APPENDIX M: Custom Class Budget 2025-2028

Requested APPENDICES E, F, and H are not applicable and have therefore been omitted.

APPENDIX A:

BACKGROUND INFORMATION SHEETS FOR EACH GOVERNING BOARD MEMBER

Appendix A: Background Information Sheet
Complete this form for each governing board member. Do not include a resume. This page may be copied as many times as necessary.

Name:
Cory Henwood

Position on Board:
Board Chair

Area of Expertise:
LEA Systems Leadership, Utah Grants, Personalized Competency-Based Learning, Digital Teaching and Learning, Online Education

Statement of Intent Regarding Role on the Board:

I have had the opportunity to lead several innovative school models to success and intend to do the same with Custom Class. I was the principal of a redesigned private school before becoming the Innovation Director at Iron County School District. This position allowed me to start new schools, including the high performing Launch High School, and the rapidly growing Iron Online as well as scaling innovation in existing programs throughout Iron County. I will lend my experience in new school models and management to my expertise in online learning and personalized competency-based learning.

Not-for-Profit History Relevant to Board Role:

I have been fortunate to serve in leadership positions of several non-profit groups. I currently serve as the President of Red Rock Hockey League and have served in that position since its inception in 2022, leading the efforts of growing and managing the league's operations. I have also served as a director of the Panther Volleyball Club, a non-profit whose purpose was to develop high school volleyball players year round. I have also served in local leadership for the Church of Jesus Christ of Latter-Day Saints as Elder's Quorum President, Bishop, High Councillor, and Stake Young Men President to name a few leadership roles.

Employment History Relevant to Board Role:

I have had the experience of serving as the Innovation Director in Iron County School District for 8 years, where I have been able to start new schools and programs, manage grant programs within Utah Grants, and foster new pedagogical shifts including navigating the shift to online learning during CoVID-19 for all students and teachers, and the continuation of online programs through Iron Online. Additionally, I serve as a consultant for schools and districts trying to improve their innovation efforts and start new schools and programs. I work nationwide as a consultant and coach with KnowledgeWorks and Empower Education. Prior to this work I was a principal, math coach, department chair and teacher for over a decade.

Education History Relevant to Board Role:

I have an active educators license with endorsements in Educational Technology, and Secondary Mathematics. I completed a Bachelor's Degree in Science from University of Lethbridge before completing my graduate degree in Education from the same institution. I continue my education regularly with credit received from multiple conferences, workshops, and professional development classes primarily in innovative areas from digital teaching and learning to computer science.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO THE UTAH STATE CHARTER SCHOOL BOARD TO VERIFY ANY INFORMATION PROVIDED. I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

Applicant's Signature:

Date:

10/25/2024

Appendix A: Background Information Sheet
Complete this form for each governing board member. Do not include a resume. This page may be copied as many times as necessary.

Name:
Matthew J. Middione, Ph.D.

Position on Board:
Board Vice Chair

Area of Expertise:
Scientific Research, Charter Board Service, Fundraising, Higher Education Institutions, Grant Writing and Reporting

Statement of Intent Regarding Role on the Board:
I'm looking forward to bringing my scientific expertise and leadership directly to your board. Leading the Vista Charter Board's successful $13 million expansion project honed my skills in strategic planning and fundraising. This, coupled with my grant-writing experience, positions me to make a significant impact. As a collaborative and results-oriented leader, I'm confident I can help our organization achieve its goals and be a successful leader in education innovation.

Not-for-Profit History Relevant to Board Role:
For six years, I served on the board of Vista Charter School, culminating in a successful two-year term as Board Chair. During that time, I spearheaded their $13 million expansion project, demonstrating my ability to navigate complex initiatives and achieve impactful results. My dedication extends beyond academic roles. I currently coach and play a key role in fundraising for the Red Rock Hockey League, fostering a positive environment for youth development. These experiences have instilled in me strong leadership, collaboration, and fundraising skills, all of which I'm happy to contribute to the Custom Class Board.

Employment History Relevant to Board Role:
My career path has constituted a blend of science, research, and leadership. Currently, I work at GE HealthCare as the Director of Research and Scientific Affairs for National Accounts. In this role I manage relationships and engage in key collaborative research partnerships to generate scientific mindshare with major healthcare systems across the United States and Canada. Prior to my current role, I spent five years at Stanford as a Research Scientist in the Department of Radiology, culminating in 10 submitted grants to industry partners and government agencies, six published manuscripts, 32 published abstracts, seven presentations at international conferences, and one industry sponsored patent. Prior to Stanford, I held two consulting roles, one focusing on fundraising and another providing technical support for research projects. Prior to that, I spent four years as a Scientist at GE Healthcare, collaborating with various academic institutions across the United States to engage in new research that could lead to the development of new products. At the core of my skill set lies my desire to solve problems. Throughout my career, I've consistently demonstrated a drive to solve problems and the associated leadership and teamwork skills to get the job done.

Education History Relevant to Board Role:

My academic journey began at California State University, Fresno, where I earned a Bachelor of Science in Biomedical Physics. This was the first undergraduate Biomedical Physics Program offered in the United States. There, I thrived, receiving recognition on the Dean's list each year, a scholarship every year, a summer internship scholarship at UC Davis, and the Outstanding Undergraduate Physics Student award. My passion for research later blossomed at UCLA, where I earned both a Master's degree and Doctorate in Biomedical Physics. During this time, my groundbreaking work in cardiovascular MRI earned me the ISMRM Young Investigator Award and the top speaker prize at the annual UCLA Biomedical Physics Research Colloquium.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO THE UTAH STATE CHARTER SCHOOL BOARD TO VERIFY ANY INFORMATION PROVIDED. I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

Applicant's Signature:

Date:

10/25/2024

Appendix A: Background Information Sheet
Complete this form for each governing board member. Do not include a resume. This page may be copied as many times as necessary.

Name:
Tom Rupp

Position on Board:
Board Member

Area of Expertise:
Loans, Credit, Risk Analysis, Networking, Social Media Marketing, Home Schooling

Statement of Intent Regarding Role on the Board:
I'm eager to join the Custom Class Board and contribute my strengths. With 14+ years in mortgage lending, I possess a strong foundation in loan analysis, risk management, and financial oversight. My experience as Treasurer for the Red Rock Hockey League further demonstrates my commitment to fiscal responsibility in non-profits. Beyond finance, my social media marketing skills can bolster the program's online presence. As a homeschooling parent, I bring a valuable perspective on alternative education. I'm confident I can significantly contribute to the board's success.

Not-for-Profit History Relevant to Board Role:
I've been actively involved with the Red Rock Hockey League for the past year and a half, serving on the board as Treasurer and bringing my financial expertise to the table. In this role, I ensured responsible fiscal management of the league's resources. But my contributions extended beyond the boardroom. I also coached and spearheaded their social media marketing campaigns, combining my passion for the sport with my marketing skills to expand the league's reach and engagement.

Employment History Relevant to Board Role:
Leveraging over 14 years of experience in the mortgage industry, I've honed my skills across various roles. Currently, at Cardinal Financial, I excel as a Mortgage Underwriter, ensuring loan compliance and accuracy. Previously, at Academy Mortgage, I thrived as a Loan Officer, guiding clients through the entire loan process, from pre-approval to closing. My foundation lies in regional operations management at WJ Bradley Mortgage Capital Corp., where I streamlined loan flow and ensured efficient communication across departments. I'm confident this comprehensive experience positions me well to contribute to our team and make sure we are financially in tip top shape and have the support we need to make wise financial decisions.

Education History Relevant to Board Role:
I've complimented my extensive mortgage industry experience with a strong educational foundation. I hold certifications as a Direct Endorsement Underwriter and a VA SAR specialist, demonstrating my in-depth knowledge of loan compliance and regulations. Additionally, I possess my Mortgage Loan Officer license (NMLS ID 1384040), showcasing my well-rounded understanding of the entire loan process. This commitment to ongoing learning ensures I can confidently navigate the complexities of the financial industry and hope to bring this expertise and willingness to learn to the charter school industry.

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Applicant's Signature:

Date:

10/25/2024

Appendix A: Background Information Sheet
Complete this form for each governing board member. Do not include a resume. This page may be copied as many times as necessary.

Name:
Douglas Reed

Position on Board:
Board Member

Area of Expertise:
Trades work, Industry Certifications, Business Mentorship, Community Building and Networking

Statement of Intent Regarding Role on the Board:
I'm enthusiastic about the opportunity to join the Custom Class Board and ignite student success through my network. My passion for community building aligns perfectly with Custom Class' mission. I envision a robust network of mentors, business partners, and guest speakers – industry professionals offering real-world insights and businesses partnering on internships or apprenticeships. With my experience building connections and my own expertise, I'll bridge the gap between students and the professional world. I'm committed to building a network that empowers students, enriches their education, and prepares them to thrive.

Not-for-Profit History Relevant to Board Role:
I'm passionate about giving back to the community and have a strong track record in non-profit leadership. Since the Red Rock Hockey League's inception in 2022, I've served as Vice President, overseeing various aspects of the organization. In this role, I've also volunteered as a coach and director of officiating, demonstrating my dedication to youth development and program growth.

Employment History Relevant to Board Role:
My journey started with a passion for building – not just homes, but businesses. For two years, I owned and operated a Domino's franchise, after previously serving as a General Manager for 3 years. This experience was my proving ground, where I honed my leadership skills, mastered financial management, and learned the importance of exceptional customer service. My mechanical aptitude shone through in my 5 years as a senior technician at Mazda and Honda dealerships. Troubleshooting complex systems comes naturally to me. But the desire to create something entirely new led me to Prestige Woodworks. During these last 2.5 years as a cabinetmaker, I have meticulously crafted beautiful pieces, further developing my attention to detail and problem-solving abilities and every day I am encouraged to find new and more efficient ways to get my work done. This blend of hands-on skills and business acumen allows me to approach any challenge with a unique perspective and I am hopeful to help the team make the industry connections they need to help students of Custom Class find success.

Education History Relevant to Board Role:
My educational background reflects both a broad academic foundation and specialized technical expertise. I completed General Education courses at Brigham Young University-Idaho, fostering a well-rounded understanding of various disciplines. Building on that foundation, I pursued certifications as a Honda Technician and a Mazda Senior Technician. These certifications showcase my commitment to ongoing learning and my deep understanding of complex automotive systems. This blend of academic knowledge and technical expertise allows me to approach any challenge with a comprehensive perspective.

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Applicant's Signature:

Date:

10/25/2024

Appendix A: Background Information Sheet
Complete this form for each governing board member. Do not include a resume. This page may be copied as many times as necessary.

Name:
Cody Saulpaw

Position on Board:
Board Member

Area of Expertise:
Financial Planning, Chamber of Commerce, Business Development, Sponsorship, Networking

Statement of Intent Regarding Role on the Board:
The Custom Class Board's dedication to student success in life beyond academics is inspiring. I envision myself actively building a bridge between education and real-world experience. By leveraging my connections within local business groups, I can help create a robust internship and mentorship network for Custom Class students. I can advise the board financially on employee benefits, retirement planning, and custodial accounts for student businesses. I have mentored many students interested in or studying financial planning and business development. My passion for mentorship compels me to implement a program pairing students with experienced professionals, providing them with invaluable guidance and support as they launch their careers and learn transferable skills that will help them no matter what they do beyond school.

Not-for-Profit History Relevant to Board Role:
I'm passionate about giving back to the community and have a proven track record of building strong connections. For example, as head of sponsorship for the Red Rock Hockey League, I leveraged my network to secure valuable resources for the organization. Additionally, my experience as a coach demonstrates my commitment to youth development. Beyond sports, I thrived in leadership roles within both the BNI (Business Network International) and the Chamber of Commerce. As Communications Chair for BNI from 2018-2019, I spearheaded outreach efforts, connecting with local businesses in St. George and promoting the group's mission. Similarly, during my time with the Chamber of Commerce (2014-2016), I actively fostered connections within the business community. These experiences have honed my communication and networking skills, making me confident in my ability to build a robust network to benefit the Custom Class students.

Employment History Relevant to Board Role:
My career has been dedicated to empowering financial well-being. For over a decade, I ran my own financial advisory firm, Grayson Financial, LLC. During that time, I managed a significant portfolio of $65 million in assets, helping local families and businesses navigate the complexities of finance. My expertise spans a wide range of areas, including workplace insurance benefits, retirement plans for both public and private sectors, college savings strategies, and business

planning and development. I'm passionate about guiding individuals towards financial security, and this passion extends beyond individual clients. Early in my career, I participated in an internship at Vision Venture Capital. There, alongside a team of local business leaders, I played a key role in vetting potential investments for promising Utah startups. This experience instilled in me the importance of supporting local businesses and fostering economic growth within our community. I believe these combined experiences – managing personal finances, advising businesses, and supporting entrepreneurs – uniquely position me to contribute to the success of the Custom Class Board.

Education History Relevant to Board Role:
My educational background equips me to translate financial knowledge into actionable strategies. In 2012, I earned a Bachelor's in Business Administration and Finance from Dixie/Utah Tech, laying a strong foundation for my career. Building on this foundation, I hold both Series 7 and Series 66 investment licenses, demonstrating my commitment to rigorous financial expertise. I possess Utah Life and Health insurance licenses, showcasing my ability to provide comprehensive financial guidance. This combination of education, licensing, and experience allows me to confidently navigate the complexities of finance and empower others to do the same.

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Applicant's Signature:

Date:

10/25/2024

APPENDIX B:

ARTICLES OF INCORPORATION

Non-Profit Corporation Articles

ARTICLES OF INCORPORATION
OF
RED ROCK HOCKEY LEAGUE

We, the undersigned natural persons all being of the age of eighteen years or more, acting as incorporators under the Utah Non-Profit Corporation and Cooperative Association Act, adopt the following Articles of Incorporation for such Corporation:

Article I

NAME OF CORPORATION

The name of the corporation is Red Rock Hockey League

Article II

PURPOSE

Red Rock Hockey League's purpose is to help people develop the confidence and skills to enjoy and find success in life through education, sport, and beyond.

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.

1. **No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to, its members, trustees, officers, or other persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered to the corporation and to make payments and distributions in furtherance of the purposes set forth herein;**
2. **no substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in , or intervene in (including the publishing or distribution of statements) any political campaign on behalf of any candidate for public office except as authorized under the Internal Revenue Code of 1954, as amended;**
3. **the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from Federal income tax under 501(c)(3) of the Internal Revenue Code of 1954, as amended (or the corresponding provision of any future United States Internal Revenue law).**

Article III

NAME AND ADDRESS OF REGISTERED AGENT

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

3083 E 2890 S Circle

St George, UT 84790

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

Cory Henwood

Article IV

NAME AND ADDRESS OF INCORPORATORS

Incorporator #1

Cory Henwood

3083 E 2890 S Circle

St George, UT 84790

Cory Henwood

Signature

In Witness Whereof, We have executed these amended Articles of Incorporation in duplicate this 4th day of May, 2024, 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

VOTING MEMBERS

The non profit corporation will have voting members

Article VI

SHARES

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

Article VII

ASSETS

Upon dissolution assets of the corporation will be distributed in a manner consistent with law. Should the governing body decide to take on debt on behalf of the corporation, neither the charter school authorizer nor the state, including an agency of the state, is liable for the debts or financial obligations of the charter school or persons or entities that operate the charter school.

Article VIII

PRINCIPAL ADDRESS

3083 E 2890 S Circle

St George, UT 84790

Article IX

NAME AND ADDRESS OF DIRECTORS / TRUSTEES / OFFICERS

Director #1

Cory Henwood

3083 E 2890 S Circle

St George, UT 84790

Cory Henwood

Signature

President #2

Cory Henwood

3083 E 2890 S Circle

St George, UT 84790

Cory Henwood

Signature

Director #3

Douglas Reed

3083 E 2890 S Circle

St George, UT 84790

Douglas Reed

Signature

Vice President #4

Douglas Reed

3083 E 2890 S Circle

St George, UT 84790

Douglas Reed

Signature

Director #5

Tom Rupp

3083 E 2890 S Circle

St George, UT 84790

Tom Rupp

Signature

Treasurer #6

Tom Rupp

3083 E 2890 S Circle

St George, UT 84790

Tom Rupp

Signature

Secretary #7

Cory Henwood

3083 E 2890 S Circle

St George, UT 84790

Cory Henwood

Signature

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.

APPENDIX C:

GOVERNING BOARD BYLAWS

BYLAWS
of
RED ROCK HOCKEY LEAGUE

a Not-For-Profit Corporation

ARTICLE I
Company Formation

1.01. **FORMATION**. This Corporation is formed pursuant to the laws of the state of incorporation, as stated in the Articles of Incorporation for the Corporation.

1.02. **CORPORATE CHARTER COMPLIANCE.** The Board of Directors (the "Board") acknowledges and agrees that they caused the Articles of Incorporation to be filed with the respective state office and all filing fees have been paid and satisfied.

1.03. **REGISTERED OFFICE & REGISTERED AGENT.** The registered office of the corporation shall be located within the state of incorporation and may be, but need not be, identical with the principal office. The address of the registered office may be changed from time to time. The Board is obligated to maintain and update the corporate records on file with the Corporation's registered agent.

1.04. **OTHER OFFICES.** The Corporation may have other offices, either within or outside of its state of incorporation, as selected by the Board.

1.05. **CORPORATE SEAL.** The Board may adopt a corporate seal with the form and inscription of their choosing, however, the adoption and use of a corporate seal is not required.

1.06. **PURPOSE.** Consistent with the Articles of Incorporation, and until such time that the Articles of Incorporation have been amended, this Corporation is formed to engage in any lawful public tax-exempt not-for-profit business purpose.

1.07. **ADOPTION OF BYLAWS.** These corporate Bylaws have been adopted by the Board on behalf of the Corporation.

ARTICLE 2
Board of Directors

2.01. **INITIAL MEETING OF THE BOARD.** The Board has conducted and completed the initial meeting necessary to begin the business operations of the Corporation, including the adoption of these Bylaws. At the initial meeting of the Board, the initial directors were appointed to their respective staggered terms, and at least one director was appointed to an abbreviated term set to expire upon occurrence of the first annual meeting of the Board whereby that director can either be re-elected or replaced by the Board pursuant to these Bylaws.

2.02. **POWERS AND NUMBERS.** The management of all the Corporation's affairs, property, and interests shall be managed by or under the direction of the Board. Directors need not be members of the Corporation or residents of the state of incorporation to qualify and serve the Corporation as a director.

Until these Bylaws are amended, the Board consists of up five (5) directors who are elected for the term of three (3) years, and will hold office until their successors are duly elected and qualified at the following annual meeting of the Board. One of the initial directors shall serve an initial term of one (1) year, the second initial director shall serve an initial term of two (2) years, and the third initial director shall serve an initial term of the full three (3) years. Successor directors will be elected each year to replace or re-elect the incumbent director.

2.03. **DIRECTOR LIABILITY.** Each director is required, individually and collectively, to act in good faith, with reasonable and prudent care, and in the best interest of the Corporation. If a director acts in good faith and in a manner that is reasonably in line with the best interests of the Corporation as determined by a reasonably prudent person situated in similar circumstances, then they shall be immune from liability arising from official acts on behalf of the Corporation. Directors who fail to comply with this section of these Bylaws shall be personally liable to the Corporation for any improper acts and as otherwise described in these Bylaws.

2.04. **CLASSES OF DIRECTORS**. Until such time as these Bylaws are accordingly amended, the Corporation does not have classes of directors.

2.05. **CHANGE OF NUMBER.** The Board may increase or decrease the number of directors at any time by amendment of these Bylaws, pursuant to the process outlined in Article 8 of these Bylaws. A decrease in number does not have the effect of shortening the term of any incumbent director. If the established number of directors is decreased, the directors shall hold their positions until the next meeting of the Board occurs and new directors are elected and qualified.

The Corporation must have at least three (3) directors.

2.06. **ELECTION OF DIRECTORS.** Directors are to be voted on and elected at each annual meeting of the Board, unless a special meeting is expressly called to remove a director or fill a vacancy. If a director is elected, but is not yet qualified to hold office, then the previous director shall holdover until such time that the newly elected director is so qualified.

2.07. **REMOVAL OF DIRECTORS.** At any meeting of the Board called expressly for that purpose, any director, including the entire Board, may be removed by an affirmative majority vote by the current Board. If the Board votes to remove the entire Board, then the President, Treasurer, and Secretary will serve as the interim Board until directors are duly elected to the Board pursuant to these Bylaws. If the Corporation has members, then the members must promptly have a special meeting to elect directors to the Board. As soon as practical, the members or the interim. Board must meet to elect directors via the process described in Section 2.02 of these Bylaws.

2.08. **VACANCIES.** All vacancies in the Board may be filled by the affirmative vote of a majority of the remaining directors, provided that any such director who fills a vacancy is qualified to be a director and shall only hold the office for the term specified in Section 2.02 of these Bylaws and until a new director is duly elected by the Board or members. Any vacancy to be filled due to an increase in the number of directors may be filled by the Board for a term lasting until the next annual election of directors by the Board at the annual meeting or a special meeting called for the purpose of electing directors. Any director elected to fill a vacancy which results from the removal of a director shall serve the remainder of the term of the removed director and until a successor is elected by the Board and qualified.

Any individual who fills a vacancy on the Board shall not be considered unqualified or disqualified solely by virtue of being an interim director.

2.09. **REGULAR MEETINGS.** Acting in accordance with the Utah Open and Public Meetings Act, the meetings of the Board or any committee may be held at the Corporation’s principal office or at any other place designated by the Board or its committee,including by means of remote communication. The board will hold at least eight (8) meetings a year.

2.10. **SPECIAL MEETINGS.** Special meetings of the Board may be held at any place and at any time and may be called by the President, Vice President, Secretary, or Treasurer, or any director. Any special meeting of the Board must be preceded by at least forty-eight (48) hours' notice of the date, time, place, and purpose of the meeting, unless these Bylaws require otherwise.

2.11. **ACTION BY DIRECTORS WITHOUT A MEETING**. Any action which may be taken at a meeting of the Board (or its committee) may be taken without a meeting, provided all directors (or committee members) unanimously agree, and such unanimous consent is included in the minutes of the proceeding, filed with the corporate books/records, and sets forth the action taken by the Board.

2.12. **NOTICE OF MEETINGS.** Regular meetings of the Board must be held with reasonable notice of the date, time, place, or purpose of the meeting. Notice may be given personally, by email, by facsimile, by mail, or in any other lawful manner, so long as the method for notice comports with Article 6 of these Bylaws. Oral notification is sufficient only if accompanied by a written record of the notice in the corporate books/records. Notice is effective at the earliest of:
a. Receipt;
b. Delivery to the proper address or telephone number of the director(s) as shown in the Corporation's records; or
c. Five (5) days after its deposit in the United States mail, as evidenced by the postmark, if correctly addressed and mailed with first-class postage prepaid.

2.13. **QUORUM**. A simple majority of the current directors present prior to the start of a meeting constitutes a quorum, and a quorum is necessary at all meetings creating an action to transact business on behalf of the Corporation.

2.14. **MANNER OF ACTING.** Subject to the laws of the state of incorporation, as may be amended from time to time, the act of the majority of the directors present at a meeting at which a quorum is present when the vote is taken shall be the act of the Board unless the Articles of Incorporation require a greater percentage.

2.15. **WAIVER OF NOTICE**. A director waives the notice requirement if that director attends or participates in the meeting, unless a director attends the meeting for the express purpose of promptly objecting to the transaction of any business because the meeting was not lawfully called or convened. A director may waive notice by a signed writing, delivered to the Corporation for inclusion in the minutes, before or after the meeting.

2.16. **REGISTERING DISSENT.** A director who is present at a meeting at which an action on a corporate matter is taken is presumed to have assented to such action, unless the director expressly dissents to the action. A valid dissent must be entered in the meeting's minutes, filed with the meeting's acting Secretary before its adjournment, or forwarded by registered mail to the Corporation's Secretary within twenty-four (24) hours after the meeting's adjournment. These options for dissent do not apply to a director who voted in favor of the action or failed to express such dissent at the meeting.

2.17. **EXECUTIVE AND OTHER COMMITTEES.** The Board may create committees to delegate certain powers to act on behalf of the Board, provided the Board passes a resolution indicating such creation or delegation. The Board may delegate to a committee the power to appoint directors to fill vacancies on the Board. All committees must record regular minutes of their meetings and keep the minute book at the corporation's office. The creation or appointment of a committee does not relieve the Board or individual directors from their standard of care described in Section 2.03 of these Bylaws.

2.18. **REMUNERATION.** The Board may adopt a resolution which results in directors being paid a reasonable compensation for their services rendered as directors of the Corporation, provided the compensation is less than the operating costs of the Corporation. Directors may also be paid a fixed sum and expenses, if any, for attendance at each regular or special meeting of such Board. Nothing contained in these Bylaws precludes a director from receiving compensation for serving the Corporation in any other capacity, including any services rendered as an officer, employee, or third party service provider. If the Board accordingly passes a resolution related to committees of the Board, then committee members may be allowed like compensation for attending committee meetings. At any time, a resolution of the Board that grants compensation to a director may be challenged by another director, provided the challenging director requests a special Board meeting specifically addressing the resolution related to director compensation.

Any director who votes for a resolution related to director compensation may be held liable under Section 2.03 of these Bylaws if the resolved director compensation is unreasonably excessive, violates any section of Article 2 of these Bylaws, or unreasonably jeopardizes the nonprofit or tax-exempt status of the Corporation.

2.19. **LOANS.** No loans may be made by the Corporation to any director.

2.20. **INDEMNIFICATION.** Provided the director complies with the standard of care described in Section 2.03 of these Bylaws, the Corporation shall indemnify any director made a party to a proceeding, brought or threatened, as a consequence of the director acting in their official capacity. In the event a director is entitled to indemnification by the Corporation, the director shall be indemnified or compensated for reasonable expenses incurred as a consequence of being connected to the Corporation and serving in good faith on its behalf.

2.21. **ACTION OF DIRECTORS BY COMMUNICATIONS EQUIPMENT.** Any action which may be taken at a meeting of the Board, or a committee, may be taken by means of a telephone or video conference or similar communications equipment which allows all persons participating in the meeting to hear each other at the same time. A director participating in a meeting by remote means is deemed to be present in person at the meeting.

ARTICLE 3
Members

3.01. **MEMBERSHIP.** Until such time that the Corporation's Articles of Incorporation or these Bylaws are amended, the Corporation has no members.

ARTICLE 4
Officers

4.01. **DESIGNATIONS.** The Corporation shall have a President, a Secretary, and a Treasurer, who will be elected by the Board. The Corporation may also have one or more Vice-Presidents (one shall serve as Executive Vice-President) and Assistant Secretaries and Assistant Treasurers as the Board may designate. Per these Bylaws, an elected officer will hold office for one (1) year or until a successor is elected and qualified. The same person may hold any two or more offices concurrently, with exception to the offices of President, Vice-President (if any), and Secretary which shall be held by separate individuals.

4.02. **REMOVAL AND RESIGNATION OF OFFICERS.** Any officer or agent may be removed by the Board at any time, with or without cause. Such removal shall be without prejudice to the contract rights, if any of the person so removed. Appointment of an officer or agent does not, by itself, create contract rights.

Any officer may resign at any time by giving written notice to the Board, the President, or the Secretary. Any such resignation shall take effect upon receipt of such notice or at any later time specified therein, and unless otherwise specified in the notice, the acceptance of such resignation shall not be necessary to make it effective.

4.03. **THE PRESIDENT OR CHAIR.** The President or Chair shall have general supervision of the Corporation's daily affairs and perform all other duties as are incident to the office or are properly required by a resolution passed by the Board.

4.04. **VICE PRESIDENT OR VICE CHAIR.** During the absence or disability of the President, the Executive Vice-President (if any) may exercise all functions of the President. Each Vice-President shall have such powers and fulfill such duties as may be assigned by a resolution of the Board.

4.05. **SECRETARY AND ASSISTANT SECRETARIES.** The Secretary must:
a. Issue notices for all meetings and actions of the Board;
b. Accept all requests for special meetings of the Board;
c. Accept all notices of proxy appointments and revocations;
d. Keep the minutes of all meetings;
e. Accept delivery of any dissent announced at any meeting of the Board;
f. Have charge of the corporate seal and books; and
g. Make reports and perform duties as are incident to the office, or are properly required of him or her by the Board.
The Assistant Secretary, or Assistant Secretaries (in the order designated by the Board), shall perform all of the duties of the Secretary during the absence or disability of the Secretary, and at other times perform such duties as are directed by the Secretary, the President, or the Board.

4.06. **THE TREASURER.** The Treasurer shall:
a. Have custody of all the Corporation's monies and securities and keep regular books of account;
h. Disburse the Corporation's funds in payment of the just demands against the Corporation or as may be ordered by the Board, taking proper vouchers for such disbursements; and
i. Provide the Board with an account of all his or her transactions as Treasurer and of the financial conditions of the office properly required of him or her by the Board.
The Assistant Treasurer, or Assistant Treasurers (in the order designated by the Board), shall perform all of the duties of the Treasurer in the absence or disability of the Treasurer, and at other times perform such duties as are directed by the Treasurer, the President, or the Board. In the event of the absence or disability of the President and Vice President, then the Treasurer shall perform such duties of the President.

4.07. **DELEGATION.** In the absence or inability to act of any officer and of any person authorized to act in their place, the Board may delegate the officer's powers or duties to any other officer, director, or other person, subject to Section 4.01 of these Bylaws. Vacancies in any office arising from any cause may be filled by the Board, subject to Section 4.01 of these Bylaws, at any regular or special board meeting.

4.08. **OTHER OFFICERS.** The Board may appoint other officers and agents as they deem necessary or expedient. The term, powers, and duties of such officers will be determined by the Board and described in the resolution authorizing the appointment or designation.

4.09. **LIABILITY.** Each officer is required, individually and collectively, to act in good faith, with reasonable and prudent care, and in the best interest of the Corporation. If an officer acts in good faith and in a manner that is reasonably in line with the best interests of the Corporation as determined by a reasonably prudent person situated in similar circumstances, then they shall be immune from liability arising from official acts on behalf of the Corporation.
Officers who fail to comply with this section of these Bylaws shall be personally liable to the Corporation for any improper acts and as otherwise described in these Bylaws.

4.10. **LOANS.** No loans may be made by the Corporation to any officer.

4.11. **BONDS.** The Board may resolve to require any officer to give bonds to the Corporation, with sufficient surety or sureties, conditioned upon the faithful performance of the duties of their offices and compliance with other conditions as required by the Board.

4.12. **SALARIES.** Officers' salaries will be fixed from time to time by the Board. Officers are not prevented from receiving a salary by reason of the fact that he or she is also a director of the Corporation.

4.13. **INDEMNIFICATION**. Officers shall be indemnified by the Corporation, so long as the officer acted in a manner substantially similar to and consistent with the standard of care required for directors, as described in Section 4.09 of these Bylaws. Any officer indemnification shall be limited to proceedings that are directly related to or have arisen out of the officer's acts on behalf of the Corporation.

ARTICLE 5
Books and Records

5.01. **MEETING MINUTES.** As required by these Bylaws, the Corporation must keep a complete and accurate accounting and minutes of the proceedings of the Board within the corporate books/records.

5.02. **RETENTION OF RECORDS.** The Corporation shall keep as permanent records all meeting minutes of the Board, all actions taken without a meeting by the Board, all actions taken by committee on behalf of the Board, and all waivers of notices of meetings.

5.03. **ACCOUNTING RECORDS.** The Corporation shall maintain appropriate accounting records.

5.04. **LEGIBILITY OF RECORDS.** Any books, records, and minutes may be in any form capable of being converted into written form within a reasonable time upon request.

5.05. **RIGHT TO INSPECT.** Any director or director representative has the right, upon written request delivered to the Corporation, to inspect and copy during usual business hours the following documents of the Corporation:

a. Articles of Incorporation;
b. These Bylaws;
c. Minutes of the Board proceedings;
d. Annual statements of affairs; and
e. The other documents held at the principal address pursuant to these Bylaws.

The Corporation acknowledges and agrees that any obligation to produce corporate documents under this Article of these Bylaws shall attach to the Secretary as part of the duties described in Section 4.05 of these Bylaws.

ARTICLE 6
Notices

6.01. **MAILING OF NOTICE.** Except as may otherwise be required by law, any notice to any officer or director may be delivered personally or by mail. If mailed, the notice will be deemed to have been delivered on the close of business of the fifth business day following the day when deposited in the United States mail with postage prepaid and addressed to the recipient's last known address in the records of the Corporation.

6.02. **E-NOTICE PERMITTED.** Any communications required by the Act, these Bylaws, or any other laws may be made by digital or electronic transmission to the recipient's known electronic address or number as known to the Corporation at the time of notice.

6.03. **DUTY TO NOTIFY.** All directors, officers, employees, and representatives of the Corporation are required to notify the Corporation of any changes to the individual's contact information. Pursuant to the obligations under this Section of these Bylaws, the individual must notify the Corporation that electronic transmissions of notice are impracticable, impossible, frustrated, or otherwise improper and ineffective.

ARTICLE 7
Special Corporate Acts

7.01. **EXECUTION OF WRITTEN INSTRUMENTS.** All contracts, deeds, documents, and instruments that acquire, transfer, exchange, sell, or dispose of any assets of the Corporation must be executed by the President to bind the Corporation. If the President is incapacitated or otherwise unavailable, then the designated Vice-President may execute the respective documents to bind the Corporation. This Section does not apply to any checks, money orders, notes, or other financial instruments for direct payment of corporate funds which are subject to Section 7.02 of these Bylaws.

7.02. **SIGNING OF CHECKS OR NOTES**. All authorizations to distribute, pay, or immediately draw upon the financial resources of the Corporation must be signed by the Treasurer, including any expense reimbursement or compensation payments to directors, officers, employees, representatives, service providers, or contractors of the Company. If the Treasurer is incapacitated or otherwise unavailable, then the President may execute the respective documents to bind the Corporation.

7.03. **SPECIAL SIGNING POWERS.** If the President holds an interest which exists outside of the capacity of being President, then any agreement involving such interest must be signed by a separate individual officer to duly bind the Corporation to such an agreement or instrument.

7.04. **MERGERS.** Following the approval by the Board, in order for any consolidation or merger to be effective, it must follow the process set out under the laws of the state of incorporation. Any merger which would result in the loss of the Corporation's not-for-profit or tax-exempt status is not permitted under these Bylaws.

7.05. **CONVERSIONS**. Following the approval by the Board, in order for any conversion of the Corporation to another organizational structure to be effective, it must follow the processes set out under the laws of the state of incorporation. Any conversion which would result in the loss of the Corporation's not-for-profit or tax-exempt status is not permitted under these Bylaws.

7.06. **DISSOLUTION**. Following the approval by the Board, in order for the Corporation to be dissolved, it must follow the process set out under the laws of the state of incorporation.

7.07. **DISTRIBUTION OF ASSETS**. Upon the dissolution of the organization, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for the public purpose. Any such assets not disposed of shall be disposed of by the District Court of the county in which the principal office of the organization is then located, as said court shall determine.

ARTICLE 8
Amendments

8.01. **BY DIRECTORS**. The Board has the power to make, alter, amend, and repeal the Corporation's Bylaws. Any alteration, amendment, or repeal of the Bylaws, shall be effective following a majority vote of the Board.

8.02. **EMERGENCY BYLAWS.** The Board may adopt emergency Bylaws which operate during any emergency in the Corporation's conduct of business resulting from an attack on the United States, a nuclear or atomic disaster, or another force majeure incident.

8.03. **COMPLIANCE WITH STATE LAW**. Any amendment to the Corporation's Articles of Incorporation or these Bylaws shall comply with the respective laws, rules, and regulations of the jurisdictions in which the Corporation operates or conducts business.

These Bylaws are adopted by resolution of the Corporation's Board of Directors on this 25th day of October, 2024.

_____

Director - Cory Henwood

_____

Director - Douglas Reed

_____

Director - Tom Rupp

APPENDIX D:

MINUTES FROM GOVERNING BOARD MEETING

RED ROCK HOCKEY LEAGUE
BOARD MEETING
May 4th, 2024

MINUTES

Meeting called to order at 9:00 AM

Tom Rupp made a motion to amend our bylaws and articles of incorporation to meet the requirements of the State Charter School Board.

Douglas Reed seconded the motion

Motion carried unanimously

Cory Henwood leads a discussion on Utah's Portrait of a Graduate and it's alignment with our organizational purposes

Douglas Reed and Cody Saulpaw further the discussion about Involving community partners and professionals in these efforts.

Meeting adjourned 10:04 AM

RED ROCK HOCKEY LEAGUE
BOARD MEETING
October 25th, 2024

MINUTES

Meeting called to order at 6:00 PM

Matthew J. Middione, Ph.D. made a motion to amend our bylaws to meet the requirements of the State Charter School Board.

Tom Rupp seconded the motion

Motion carried unanimously

Cory Henwood leads a discussion on the full application for the State Charter School Board.

Meeting adjourned 7:46 PM

APPENDIX G:

START-UP GRANT APPLICATION

Utah State Charter School Board

Startup and Implementation Grant Application – New Charter Schools Revised June 19, 2024

250 East 500 South, P.O. 144200, Salt Lake City, UT 84042
(801) 538-7720
UtahSCSB.org

The Start Up and Implementation Grant provides financial assistance for planning, program design, and initial implementation of new charter schools. A new school is authorized to receive a minimum of $357,500 and maximum of $440,000 (based on enrollment and eligible funds) distributed over two years. Funding is based on projected and actual enrollment.

The Startup and Implementation Grant is based on UCA §53F-2-705 and USBE Rule R277-554-2.

	Base for up to 200 students	*Pupil Unit for students 201-599*	*Total Allocation 400 students*
Start Up	*$275,000*	*Additional 200 students x $137.50 = $27,500*	*$302,500*
Implementation	*$82,500*	*Additional 200 students x $68.75 = $13,750*	*$96,250*
TOTAL	***$357,500***	***$41,250***	***$398,750***

Grant Assurances

Grant funds may only be used for the following:

- Post-award planning and design of the educational program;
- Research-based professional learning activities for teachers, staff, and board;
- Informing the community about the school;
- Acquiring necessary equipment and educational materials and supplies;
- Acquiring, developing or aligning curriculum, and;
- Other initial operational costs, such as:
  - Costs associated with creating and implementing office functions;
  - Costs associated with the installation of computers, data systems, networks, and telephones;
  - Personnel expenses incurred either before or after the school's opening (not to exceed a total of $5,000 per month); and
  - Rental or occupancy costs for the school facility for a reasonable period of time in preparation for the school's opening.

The board understands that:

- Funding is based on projected authorized enrollment and corrected after the October 1 actual enrollment count.
- No funding level is guaranteed.
- The school shall participate in monitoring activities, including attendance at mandatory training, and compliance with statute and rule. Failure to comply may result in a loss of funds. After the application is approved, the SCSB will send out instructions for the mandatory training.
- A budget report on the expenditure of grant money is due to the SCSB at the end of each year and a final report is due at the end of the 2nd implementation year.
- Should the charter school change to non-charter status within ten years of receiving grant funds, grant funds must be reimbursed to SCSB.
- Email your completed application to Lisa.Cooper@schools.utah.gov and ensure that you receive an email response confirming receipt of your application.

10/25/2024

Board Chair Signature | Date

***Budget** - List total dollar amount required by category, as well as the details of what will be purchased in each category*

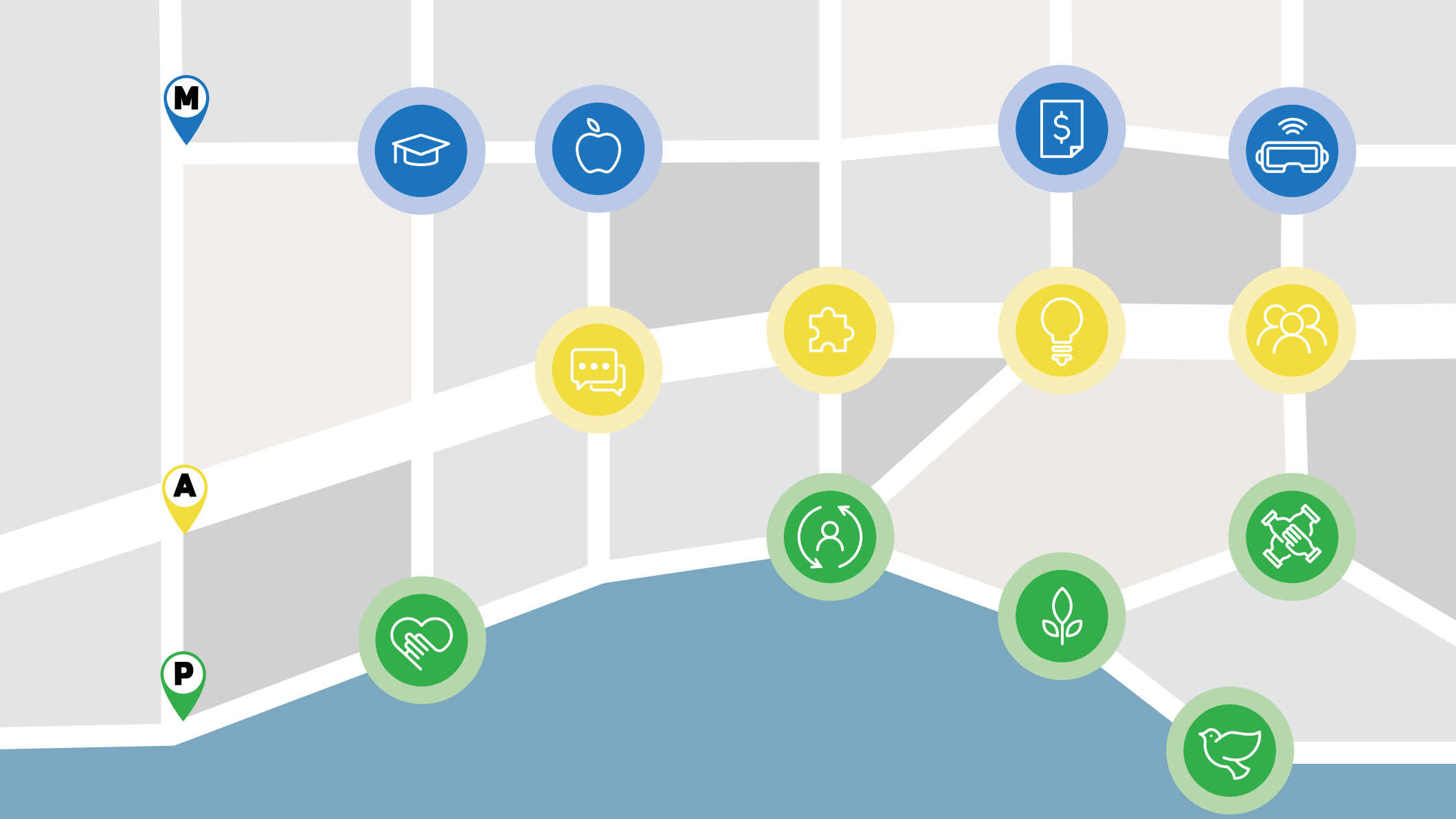
If the total amount budgeted in each category is the same at the end of the fiscal year, SCSB approval is not needed. However, if the school chooses to increase or decrease a category total, a new budget must be approved by the school's governing board and by SCSB staff.

Budget Categories	Startup Year	Implementation Year 1	Implementation Year 2	Total
Salaries (100)	$60,000	$60,000	$	$120,000
Additional info and Comments	Salaries for select teachers and administrative employees	Salaries for select administrative employees.		
Employee Benefits (200)		$	$	$
Additional info and Comments				
P & T Services (300)	$40,000	$	$	$40,000
Additional info and Comments	IT and Technical support services			
Property Services (400)	$25,000	$25,000	$	$25,000
Additional info and Comments	Lease of property	Lease of property		
Other Services (500)	$74,500	$11,250	$	$85,750
Additional info and Comments	Advertising, Insurance, and Communication	Advertising, Insurance, and Communication		
Travel (580)	$	$	$	$
Additional info and Comments				
Supplies and Materials (600)	$20,000	$	$	$20,000
Additional info and Comments	Admin and Operations Supplies			

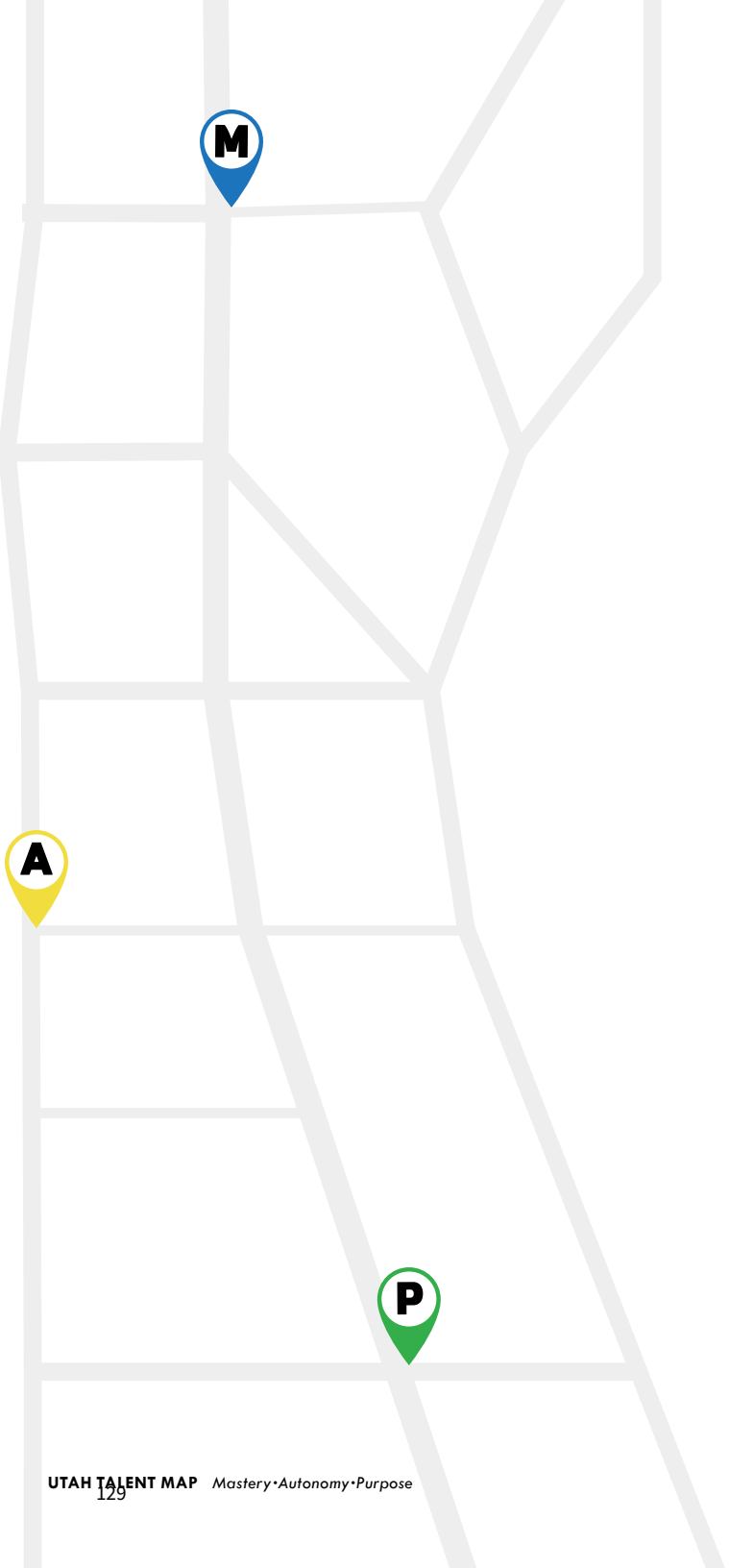
Property (700)	$83,000	$	$	$83,000
Additional info and Comments	Furniture and Maker Supplies			
Total	$302,500	$96,250	$	$398,750

APPENDIX I:

UTAH PORTRAIT OF A GRADUATE COMPETENCY MODEL RUBRICS



UTAH PORTRAIT OF A GRADUATE
COMPETENCY MODEL RUBRICS



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INTRODUCTION

Today's youth will face a world that looks dramatically different than that of their parents. In order to honor these new opportunities, Utah State Board of Education (USBE) led an extensive stakeholder engagement process in 2018 to identify the ideal characteristics of a Utah graduate. These characteristics formed the basis for USBE's Portrait of a Graduate, called the Utah Talent MAP. M-A-P stands for:

- **MASTERY** is the ability to demonstrate depth of knowledge and skill proficiency.
- **AUTONOMY** is having the self-confidence and motivation to think and act independently.
- **PURPOSE** guides life decisions, influences behavior, shapes goals, offers a sense of direction, and creates meaning.

Utah's Portrait of a Graduate, described above, identifies 13 characteristics that are cultivated in educational settings:

MASTERY

Academic mastery

Wellness

Civic, financial, and economic literacy

Digital literacy

AUTONOMY

Communication

Critical thinking and problem solving

Creativity and innovation

Collaboration and teamwork

PURPOSE

Honesty, integrity, and responsibility

Hard work and resilience

Lifelong learning and personal growth

Service

Respect

P-20 Competencies

USBE further developed this vision for graduates through the design of competencies for P-20 education in September 2020. The P-20 Competencies are aligned with Utah's Portrait of a Graduate and defines the competencies into grade bands that vertically align as learners build knowledge, skills, and dispositions from Pre-K through post-secondary.

P-20 Exemplars

The P-20 Exemplars represent how each competency within each grade band can be combined with core content standards, skills, and dispositions to provide educators ideas for how to leverage their content areas to help students achieve the vision of the Portrait of a Graduate. Competencies are intended to be integrated into each grade level and content area to support learners as they master the essential knowledge and skills to succeed and lead in an ever-changing world.

P-20 Rubrics

The P-20 Rubrics provide a model for creating intentional learning opportunities for students in alignment with the Utah Portrait of a Graduate. For each competency, the rubrics function as learning progressions through the continuum from Pre-K through post-secondary. The rubrics support student agency and self-assessment of their current application of knowledge and skills. The model rubrics are intended to be adapted by local communities to align with their LEA and school instruction. By having models available, the state promotes local implementation and supports access to the Utah Portrait of a Graduate for all stakeholders in PreK-12 education.

Utah Personalized, Competency-Based Learning Framework

Utah's Personalized, Competency-Based Learning Framework is the bridge between **Utah's Portrait of a Graduate** to the work of Utah's educators, students and families to achieve the learning outcomes as described in **Utah's Core Standards** and the **P-20 Competencies**.

This framework leverages six essential components necessary to create a personalized, competency-based learning approach. The six essential components are:

1. Purpose and Vision
2. Student Agency
3. Demonstrated Competency and Assessment
4. Customized Supports
5. Equity and
6. Social Emotional Learning

When these elements are used in concert with one another they set the learning conditions to support schools and districts in achieving the ideals of personalized, competency-based learning. Furthermore, this framework provides clear indicators and promising practices for educators, students and families needed to cultivate student learning aligned with Utah's Portrait of a Graduate.

UTAH PORTRAIT OF A GRADUATE
COMPETENCY MODEL RUBRICS

Organized by Competency

ACADEMIC MASTERY

Demonstrate a depth of knowledge in multiple subject areas to make informed decisions.

Pre-K	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to recognize, recall and sort academic content knowledge and foundational skills	Imitate foundational knowledge and skills Select foundational knowledge and skills from a group of choices Show foundational knowledge and skills	Attempt foundational knowledge and skills Identify foundational knowledge and skills found in a group Use models to show foundational academic knowledge and skills	Recognize foundational knowledge and skills Recall foundational knowledge and skills Sort foundational knowledge and skills	List foundational knowledge and skills Use foundational knowledge and skills Organize foundational academic knowledge and skills
Students will be able to use information to arrive at a conclusion or solution	Recognize a decision or choice from a list	Name information to make a conclusion or solution	Use information to arrive at a conclusion or solution	Describe information used to arrive at a conclusion or solution

ACADEMIC MASTERY

K-2	Emerging Competence	Approaching Competence	Competent	Extending Competence
With support, students will be able to retrieve, comprehend and analyze academic content knowledge and skills	Label academic knowledge and skills Show academic knowledge and skills Discern between important and less-important knowledge and skills	State knowledge and skills Describe knowledge and skills Sort specific content knowledge and skills	Recall knowledge and skills Paraphrase knowledge and skills Classify specific content knowledge and skills	Demonstrate knowledge and skills Model academic knowledge and skills Infer ideas based on content knowledge and skills
Students will be able to make observations and use information to prepare for an evidence-based conclusion or solution	Recognize information from a list based on observations to prepare for an evidence-based conclusion or solution Label information to prepare for an evidence-based conclusion or solution	List information from observation to prepare for an evidence-based conclusion or solution State information to prepare for an evidence-based conclusion or solution	Discern information through observations to prepare for an evidence-based conclusion or solution Use information to prepare for an evidence-based conclusion or solution	Categorize information through observations to prepare for an evidence-based conclusion or solution Describe information to prepare for an evidence-based conclusion or solution

ACADEMIC MASTERY

3-5	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to comprehend and infer to analyze academic content knowledge and skills across multiple disciplines	Recall academic knowledge and skills across multiple disciplines Summarize ideas from knowledge and skills across multiple disciplines	Demonstrate academic knowledge and skills across multiple disciplines Compare and contrast ideas from knowledge and skills across multiple disciplines	Describe academic knowledge and skills across multiple disciplines Infer new ideas from knowledge and skills across multiple disciplines	Organize academic knowledge and skills across multiple disciplines Predict new ideas from knowledge and skills across multiple disciplines
Students will be able to organize and select information to reach an evidence-based conclusion or solution	Summarize information to reach an evidence-based conclusion or solution Identify information from a list that could support an evidence-based conclusion or solution Model an evidence-based conclusion or solution	Compare and contrast information to reach an evidence-based conclusion or solution Select information from a list to support an evidence-based conclusion or solution Construct an evidence-based conclusion or solution	Organize information to reach an evidence-based conclusion or solution Select information to support an evidence-based conclusion or solution Establish an evidence-based conclusion or solution	Evaluate information to reach an evidence-based conclusion or solution Use information to support an evidence-based conclusion or solution Defend conclusions or solutions through use of evidence

ACADEMIC MASTERY

6-8	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to analyze, adapt and apply academic content knowledge, skills and dispositions across multiple disciplines in teacher-driven contexts	Represent academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Describe relationships between familiar and new academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Identify potential uses for academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts	Organize academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Compare and contrast relationships between familiar and new academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Differentiate appropriate uses for academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts	Analyze academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Adapt familiar academic content knowledge, skills and dispositions to accommodate new learning across multiple disciplines within teacher-driven contexts Apply academic content knowledge,skills and dispositions across multiple disciplines within teacher-driven contexts	Establish conclusions and elaborate upon implications of acquired academic content, knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Think through the implications of relationships between academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Generate uses for academic content knowledge,skills and dispositions across multiple disciplines within teacher-driven contexts
Students will be able to evaluate, organize and differentiate information to reach an evidence-based conclusion or solution	Sort, diagram and describe information to be used to arrive at an evidence-based conclusion or solution Identify a conclusion or solution based on evidence	Classify, categorize and discern information to be used to arrive at an evidence-based conclusion or solution Infer a conclusion or solution based on evidence	Evaluate, organize and differentiate information to be used to arrive at evidence-based conclusions or solutions Argue for a conclusion or solution based on evidence	Judge, critique and organize information to be used to arrive at evidence-based conclusions or solutions Defend a conclusion or solution based on evidence

ACADEMIC MASTERY

9-12	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to analyze, synthesize and transfer academic content knowledge, skills and dispositions independently across multiple disciplines and contexts	Represent content knowledge, skills and dispositions across multiple disciplines Depict and connect academic knowledge, skills and dispositions across contexts Identify connections in academic knowledge, skills and dispositions across contexts	Organize content knowledge, skills and dispositions across multiple disciplines Compare and contrast academic knowledge, skills and dispositions and across contexts Connect and Integrate academic knowledge, skills and dispositions across contexts	Analyze content knowledge, skills and dispositions independently across multiple disciplines Synthesize academic knowledge, skills and dispositions independently across contexts Transfer academic knowledge, skills and dispositions independently across contexts	Establish conclusions and elaborate upon implications of acquired content knowledge, skills and dispositions independently across multiple disciplines Defend arguments using academic knowledge, skills and dispositions independently within and across contexts Generate arguments using academic knowledge, skills and dispositions independently across contexts
Students will be able to curate information to arrive at an evidence-based conclusion or solution	Categorize information by summarizing sources in order to arrive at evidence-based conclusions or solutions Revise conclusions or solutions based on evidence	Classify information by distinguishing sources to be used to arrive at evidence-based conclusions or solutions Establish evidence-based conclusions or solutions	Curate information by selecting and organizing sources to be used to arrive at evidence-based conclusions or solutions Decide on an evidence-based conclusion or solution	Deduce information by critiquing sources to be used to arrive at evidence-based conclusions or solutions Experiment on evidence-based conclusions or solutions

ACADEMIC MASTERY

Postsecondary	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to utilize prior knowledge to emerge as contributors in their field of expertise or profession and apply this knowledge across diverse settings and new contexts	Identify, explore and organize prior and new knowledge towards a desired field of expertise or profession	Represent academic content knowledge, skills and dispositions Describe relationships between familiar and new academic content knowledge, skills and dispositions Identify potential uses for academic content knowledge, skills and dispositions	Contribute new knowledge and perspectives in field of expertise or profession	Research and report results with mastery in field of expertise or profession
Lifelong learners will be able to curate information to reach evidence-based outcomes, advancing their field of expertise or profession and adding to the collective knowledge base	Summarize information that advances a field of expertise or profession in order to arrive at evidence-based outcomes and contribute to the collective knowledge base	Organize information that advances a field of expertise or profession in order to arrive at evidence-based outcomes and contribute to the collective knowledge base	Curate information that advances a field of expertise or profession in order to arrive at evidence-based outcomes and contribute to the collective knowledge base	Generate information that advances a field of expertise or profession in order to arrive at evidence-based outcomes and contribute to the collective knowledge base

WELLNESS

Develop self-awareness, self-advocacy skills and the knowledge to maintain healthy lifestyles that provide balance in life and improve physical, mental and social-emotional well-being.

Pre-K		Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to identify emotions, recognize physical and social needs, ask for help and participate in guided wellness activities	**Physical**	Determine what physical needs are Observe activities that meet physical needs	Identify what personal physical needs are and when to ask for help Discuss activities that fit personal physical needs	Recognize physical needs and when to ask for help Participate in guided activities that meet physical needs	Select physical activities to meet needs Engage with a variety of physical activities
	Mental	Discuss what emotions are	Participate in lessons or activities that help recognize emotions	Identify a range of emotions Ask for help when support is needed	Describe connections between physical, social-emotional health and mental well-being Understand how mental health impacts behaviors
	Social-Emotional	Determine what social needs are	Discuss social activities and the importance of relationships	Participate in social activities that support relationship building	Select social activities that support building relationships with others Invite others to participate in social activities

WELLNESS

K-2		Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to explore self-awareness, participate in wellness activities and develop self-advocacy skills to express physical and social-emotional needs appropriately with trusted adults	**Physical**	List physical needs Recognize the benefits of physical activity	Match physical needs with resources and activities Name trusted adults to express physical needs with	Participate in a wide variety of physical activities to determine interests and strengths Identify physical needs and communicate them with trusted adults	Select physical activities based on interests and strengths Understand how physical health impacts engagement in other activities
	Mental	Identify personal emotions Discuss a variety of coping skills	Notice personal emotions and reactions Recognize when to use coping skills Name the trusted adults that feelings can be shared with	Understand the effects of different emotions and reactions Use coping skills, including speaking with a trusted adult, to respond to emotions	Describe connections between physical, social-emotional health and mental well-being Identify the causes of emotions and express them to a trusted adult
	Social-Emotional	Recognize the benefits of relationships	Describe various types of relationships	Develop relationships that strengthen social-emotional well-being	Initiate social activities that support relationship-building

WELLNESS

3-5		Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to develop self-awareness, participate in wellness routines and practice self-advocacy skills by asking for help with mental, physical and social-emotional needs from trusted relationships	**Physical**	Define personal physical health and wellness routines Compare healthy and unhealthy routines and who to turn to discuss physical needs	Identify how physical health can be developed through wellness routines Self-advocate for physical needs by asking for help from a trusted adult	Develop physical health through participation in wellness routines Practice self-advocacy by asking for help with physical needs from a trusted adult	Modify wellness routines to improve physical health Determine which trusted relationships are most applicable to help with personal physical needs
	Mental	Define positive and negative stress and how each feels Compare healthy and unhealthy ways to cope with emotions and minimize stress	Recognize healthy and unhealthy routines for coping with stress and uncomfortable emotions Explore a variety of healthy stress management routines and coping techniques, including self-advocacy to a trusted adult	Practice healthy stress management routines Ask for help from a trusted adult when struggling to cope with stress or other uncomfortable emotions	Reflect on the connections between physical, social-emotional and mental health Understand how to address mental health when it impacts engagement with others and activities
	Social-Emotional	Identify the characteristics of trusted relationships Explore social-emotional needs and routines	Compare a trusted relationship and a non-trusted relationship Identify supports for social-emotional needs Connect a social-emotional routine to needs	Develop trusted relationships Ask for help with social-emotional needs Incorporate social-emotional routines	Reflect on trusted relationships and explore relationship boundary-setting Utilize help and continue asking for help around social-emotional needs Maintain social-emotional routines consistently

WELLNESS

6-8		Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to practice self-awareness and self-advocacy, set goals and build routines towards balance through mental, physical and social-emotional wellness	**Physical**	Identify physical health needs Explore accessible resources to help support physical health	Prioritize physical health needs Explore different support avenues to advocate for physical health Review a variety of example goals for physical health	Set goals and build routines to meet physical health needs and work towards balance Practice identifying obstacles to learn how to overcome them and achieve goals Advocate appropriately for the supports needed to meet physical goals	Evaluate physical health accomplishments when goal-setting and reflect on the balance between mental and social-emotional health
	Mental	Define mental health needs Explore accessible mental health resources and supports	Prioritize mental health needs and potential goals and routines Identify available resources that are most applicable to support personal needs Explore different ways to advocate for mental health supports needed	Set goals and build routines to address mental health needs Identify obstacles and how to overcome them to achieve those goals Advocate appropriately for the supports needed to meet mental health goals	Evaluate mental health accomplishments when goal-setting and reflect on the balance between physical and social-emotional health
	Social-Emotional	Identify characteristics of positive, healthy relationships Discuss social-emotional wellness routines and goals	Understand social-emotional balance and identify positive, healthy relationships Begin to practice social-emotional wellness routines and goals	Establish positive, healthy relationships Implement social-emotional wellness routines and goals	Foster positive, healthy relationships by establishing boundaries and building consistency in social-emotional wellness routines and goals

WELLNESS

9-12		Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to apply self-awareness to assess and monitor needs, set goals and routines and self-advocate for the supports they need to develop balance through mental, physical and social-emotional wellness	**Physical**	Recognize physical needs and strategies to address them	Prioritize strategies to work toward goal-setting and routines that effectively address physical needs	Implement strategies to develop goals and routines that effectively address physical needs	Adapt strategies, goals and routines based on personal reflection so physical needs are addressed
	Mental	Recognize healthy and unhealthy routines for coping with stress and uncomfortable emotions Explore a variety of healthy stress management routines and coping techniques, including advocating for needs with someone trusted	Prioritize mental health needs by setting goals and implementing strategies that are most effective for strengthening mental health Engage with appropriate resources and positive relationships	Apply strategies to develop routines and meet goals while monitoring changing mental health needs Act promptly when in need or treated unfairly by seeking out the most appropriate resources, including relationships	Revise routines so that they effectively address mental health needs and help develop balance with physical and social-emotional wellness Seek out new resources, including relationships, as they become available or as needs arise
	Social-Emotional	Research wellness strategies to cultivate personal growth and positive, healthy relationships	Employ wellness strategies to cultivate personal growth and set goals that prioritize positive, healthy relationships	Refine wellness strategies by working toward goals that provide balance and cultivate personal growth and continue positive, healthy relationships	Reflect on wellness strategies by creating and accomplishing new goals to cultivate personal growth, balance and positive, healthy relationships

WELLNESS

Postsecondary		Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to evaluate and adjust self-awareness and self-advocacy skills, be adept in achieving goals, maintain wellness habits and seek out supports to create lifelong balance through mental, physical and social-emotional well-being	**Physical**	Reflect on physical health needs, wellness habits and goals Research community supports for physical wellness	Set attainable goals to build physical wellness habits Recognize community supports for physical wellness	Evaluate and adjust goals to maintain physical wellness habits Seek out community supports for personal physical wellness	Adapt goals to create lifelong physical wellness habits Participate in community supports for physical wellness
	Mental	Reflect on mental health needs Research the mental health resources available in the community and determine when professional health services may be required	Apply measurable and timely goals to design and implement a plan for maintaining lifelong mental health habits Recognize enhanced role in advocating for mental health during the transition from minor to adult	Evaluate and adjust how to determine mental health needs and how to advocate for the supports needed to maintain mental health well-being	Adapt goals, routines and self-advocacy skills to create a lifelong balance in mental health well-being
	Social-Emotional	Reflect on current relationships Determine present and future social-emotional needs and goals	Recognize positive and negative aspects of current relationships Strategize how to achieve present and future social-emotional needs and goals	Evaluate and adjust current relationships Seek out social-emotional supports from relationships Achieve present social-emotional needs and goals	Maintain and adapt positive healthy relationships that assist in achieving present and future social-emotional needs and goals

CIVIC, FINANCIAL AND ECONOMIC LITERACY

Understand various governmental and economic systems and develop practical financial skills.

Pre-K	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to interact cooperatively with adults and peers of diverse backgrounds and will contribute to the classroom community	Identify classroom rules for how to cooperate with others Determine from a list appropriate examples of how one could contribute to their classroom community	Explain classroom rules for how to cooperate with others from diverse backgrounds Describe ways to contribute to the classroom community	Cooperate with others from diverse backgrounds by sharing, taking turns with a partner and problem solving Contribute to the classroom community by fulfilling jobs, recognizing needs and participating in group activities	Cooperate with others from diverse backgrounds by sharing, taking turns with a large group and planning conflict resolution with peers Defend their perspective to peers about the importance of contributing to the classroom community Establish ideas for contributions that meet the needs of the classroom community
Students will be able to distinguish between a want and a need and will explain how jobs meet the needs of individuals in the classroom community	Recall basic needs and wants Match from a list different jobs to the individual needs they meet	Classify basic needs and wants Recognize that different jobs meet different needs within the community	Compare and contrast needs and wants Explain how people have jobs that meet diverse needs of individuals and their communities	"Design a list of individual needs and wants and evaluate why each is in its appropriate category Infer what jobs would meet needs for individuals and communities Develop different examples of jobs for individuals and communities

CIVIC, FINANCIAL AND ECONOMIC LITERACY

K-2	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to identify the structure of and roles within a diverse community and will explain how their individual role contributes to the community	Define a community Recognize personal strengths	Compare and contrast the structures of and roles within a diverse community Describe how each participant in a community has a determinant role and how to contribute to the community	Identify the structure of and roles within a diverse community Explain and discuss how individuals' personal strengths contribute to the community	Explain the importance of a classroom community and begin to participate in democratic processes within that community Establish a list of individual roles that would contribute to the classroom community based on personal strengths and enact those roles
Students will be able to identify and assign value to personal assets according to individual wants and needs	Differentiate between a need and a want Select from a list which needs and wants would be the most useful for an individual or community	Identify personal assets according to individual needs and wants Compare and contrast the relative value of individual needs and wants	Evaluate the value of personal strengths based on individual needs and wants	Evaluate peers' lists of strengths in comparison with their own Infer which personal assets would be most valuable and least valuable in a variety of real-world situations

CIVIC, FINANCIAL AND ECONOMIC LITERACY

3-5	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to develop societal awareness at the local, state and national level by expanding participation in diverse civic activities	Identify societal systems at local, state and national level Recognize civic engagement opportunities	Describe societal systems at local, state or national levels Explore ways to personally participate in diverse civic activities	Investigate and explain the relationship between the individual and societal systems at the local, state and national level Analyze opportunities and participate in diverse civic activities at the local, state or national level	Take a position on the impact of the individual and societal systems at the local, state or national level Reflect on their role in acting and participating in civic activities
Students will be able to justify wants and needs by evaluating the relationship between earning, saving and spending	Differentiate between needs and wants, as well as earning, saving and spending	Determine whether an asset is a need or a want by drawing connections between earning, saving and spending	Justify wants and needs by evaluating the relationship between earning, saving and spending	Critique the pressures that promote wants as needs Evaluate opportunities that come from budgeting, saving, earning and spending

CIVIC, FINANCIAL AND ECONOMIC LITERACY

6-8	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to understand and evaluate the role of government and economy as it relates to citizen rights and responsibilities	Identify different types and roles of governments and economies Summarize citizen rights and responsibilities	Distinguish the roles of governments and economies as it relates to citizen rights and responsibilities	Evaluate and critique the role of our government and economy as it relates to citizen rights and responsibilities	Exercise citizen rights and responsibilities with appropriate and informed actions Justify the role of our government and economy and predict the impact as it relates to citizen rights and responsibilities
Students will be able to prioritize wants and needs by allocating time, resources and assets	Classify wants and needs Measure and compare the cost of time, resources and assets	Differentiate pros and cons of wants and needs Establish conclusions regarding the cost of time, resources and assets	Prioritize wants and needs by allocating time, resources and assets	Predict and evaluate the outcome of prioritization of wants and needs

CIVIC, FINANCIAL AND ECONOMIC LITERACY

9-12	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to use their knowledge of government and economic systems to defend civic choices and analyze and evaluate options	Identify government and economic systems Explain civic choices	Compare and contrast different types of government and economic systems Draw conclusions about civic options	Use knowledge of government and economic systems to analyze and evaluate civic choices Defend civic and economic choices	Apply knowledge of civic choices with appropriate and informed action Reflect on and adapt civic choices based on community implications
Students will be able to develop sustainable plans based on financial priorities using saving strategies and asset management skills	Identify financial priorities, saving strategies and asset management skills Describe key elements of a sustainable financial plan	Critique financial priorities and asset management skills Compare and contrast elements of sustainable and non-sustainable financial plans	Establish financial priorities using saving strategies and asset management Develop a sustainable financial plan	Reflect on and adapt financial priorities, saving strategies and asset management choices Set goals and make decisions to apply a sustainable financial plan for long-term financial stability

CIVIC, FINANCIAL AND ECONOMIC LITERACY

Postsecondary	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to integrate diverse civic choices by advocating for their individual belief system within their community and society	Clarify their individual belief system by investigating community and societal issues and possible civic choices	Research and take positions on diverse civic choices based on their individual belief system in order to impact their community and society	Integrate diverse civic choices into everyday life and advocate for their individual belief system within their community and society	Assess and evaluate the implications of their civic choices and adjust their belief system or actions to continue to impact the civic processes within their community and society
Lifelong learners will be able to implement and manage individual fiscal priorities	Establish fiscal priorities and create an initial financial plan	Refine a financial plan with fiscal priorities including personal budgeting	Implement and manage individual fiscal priorities	Reflect and continue to adapt a detailed financial plan based on outcomes and implications of implementing the plan

DIGITAL LITERACY

Adapt, create, consume and connect in productive, responsible ways to utilize technology in social, academic and professional settings.

Pre-K	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to identify various digital devices and understand basic terminology	Identify digital versus non-digital devices from options	Recognize there are different types of devices	Name various digital devices with correct terminology	Describe different purposes for digital devices with correct terminology
With support, students will be able to use digital technology properly to learn and communicate with others	Attempt to use technology to learn and communicate with full support	Attempt to use technology appropriately to learn and communicate with moderate support	Use technology appropriately to learn and communicate with others with some support	Use technology appropriately to learn and communicate under supervision

DIGITAL LITERACY

K-2	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to operate digital devices safely in social and academic settings and understand the appropriate disclosure of personal information	Recognize rules for operating digital devices safely Recognize the concept of personal information	Use rules for operating digital devices safely Identify personal information	Demonstrate rules for operating digital devices safely Identify personal information and know not to share it without supervision	Explain how to operate a digital device safely Discern when and where disclosure of personal information is appropriate with supervision
Students will be able to use digital tools to find information and identify types of sources, develop creative ideas and demonstrate basic technology skills to accomplish educational goals	Use, with support, digital tools to find information Show creativity in a digital setting while learning	Use digital tools to find information and identify types of sources with minimal support Demonstrate creativity while working toward an educational goal	Use digital tools and demonstrate basic technology skills to find information and identify types of sources Develop creative ideas to accomplish an educational goal	Use digital tools and demonstrate technology skills consistently to find information and identify types of sources Generate a variety of creative ideas to complete educational goals

DIGITAL LITERACY

3-5	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to describe and model digital safety practices and respect the rights of others in social and academic settings	Recognize digital safety practices Identify ways to respect the rights of others in social and academic settings	Explain digital safety practices Demonstrate, with support, how to respect the rights of others in social and academic settings	Depict and model digital safety practices Describe and model how actions online can impact others and themselves in social and academic settings	Compare and contrast digital safety practices Adapt to changing social and academic settings while respecting the rights of others
Students will be able to identify credible digital sources, operate technology to organize and present information, create evidence of learning and communicate and collaborate to meet the needs of their audience	Choose the credible teacher-provided source with scaffolding Find information to present using technology Recognize appropriate communication and collaboration	Distinguish credibility between teacher-provided sources Collect information to demonstrate evidence of learning using technology Demonstrate appropriate communication and collaboration	Identify credible digital sources Organize and present information to show evidence of learning using technology Communicate and collaborate to meet the needs of a target audience	Discriminate the credibility of various digital sources Justify learning using technology to organize and present information Adapt appropriate communication and collaboration to meet the needs of a variety of audiences

DIGITAL LITERACY

6-8	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to use technology safely, legally and ethically, and to explain the rights, responsibilities and opportunities of participating in the digital world	Recognize rights and responsibilities of participating in the digital world Use, with support, technology safely, legally and ethically	Summarize the rights and responsibilities of participating in the digital world Demonstrate using technology safely, legally and ethically	Explain the rights, responsibilities and opportunities of participating in the digital world Apply rules for using technology safely, legally and ethically	Evaluate how different practices impact the rights, responsibilities and opportunities of participating in the digital world Model rules for using technology safely, legally and ethically
Students will be able to critically analyze digital sources, use technology to create and communicate with a variety of audiences and collaborate for education and other projects while using digital tools	Recognize rights and responsibilities of participating in the digital world Use, with support, technology safely, legally and ethically	Evaluate credibility of digital sources with minimal support Use appropriate technology to complete a task with minimal support Use digital tools to communicate and collaborate for educational purposes with minimal support	Critically analyze the credibility of digital sources Use technology to create and accomplish a goal Communicate with a variety of audiences Collaborate for education and other projects using digital tools	Defend the credibility of digital sources Utilize technology consistently to create and accomplish goals Initiate communication with a variety of audiences Lead collaboration for education and other projects using digital tools

DIGITAL LITERACY

9-12	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to engage with people and ideas using technology safely, ethically and responsibly	Identify safe and ethical practices for using technology and engaging with others	Decide how to safely, ethically and responsibly engage with technology and ideas	Justify what is safe, ethical and responsible use of technology when engaging with people and ideas	Defend their choices for using technology safely, ethically and responsibly
Students will be able to investigate and evaluate digital sources, leverage appropriate technology to create innovative solutions and effectively communicate and collaborate while in social, academic and professional settings	Select and use digital sources Identify and use appropriate technology to complete a task Communicate and collaborate, with support, in social and academic settings	Collect and compare digital sources Select and use appropriate technology to create original works Communicate and collaborate appropriately in social and academic settings with minimal support	Investigate and evaluate digital sources Leverage appropriate use of technology to create innovative solutions Communicate and collaborate effectively while in social, academic and professional settings	Investigate, analyze and organize digital sources Justify the use of appropriate technology to create innovative solutions Initiate communication with a variety of audiences Lead collaboration in social, academic and professional settings

DIGITAL LITERACY

Postsecondary	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to select and use appropriate technology and digital sources safely, ethically and productively in school, work and life	Classify types of technology and digital sources to determine the appropriate option for use in school, work and life	Evaluate types of technology and digital sources to determine the appropriate option for use in school, work and life	Adapt to new conditions by selecting and using appropriate technology and digital sources safely, ethically and productively in school, work and life	Research new technology and ethical approaches and adapt them to school, work and life
Lifelong learners will be able to independently apply current best practices and think critically when using technology in social, academic and professional settings	Recognize current best practices Identify implications of using technology in social, academic and professional settings	Explain current best practices Describe the implications of using technology in social, academic and professional settings	Apply current best practices Think critically about implications of using technology in social, academic and professional settings	Research and adapt best practices for evolving situations Raise awareness of the implications of using technology in social, academic and professional settings

COMMUNICATION

Communicate effectively through reading, writing, speaking and listening to understand information in a variety of contexts, media and languages.

Pre-K	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to convey information through expression of words, sentences, pictures and gestures for different purposes	Recognize information	Label and describe information	Deliver information through expression of words, sentences, pictures and gestures for different purposes	Use knowledge of different communication forms to select appropriate form for different purposes and audiences
Students will be able to process information and respond verbally and/or nonverbally in an appropriate manner	Recognize information communicated verbally and/or nonverbally	Determine factual accuracy of information communicated verbally and nonverbally	Process information and respond verbally and/or nonverbally in an appropriate manner	Demonstrate understanding of information by adapting responses to an audience

COMMUNICATION

K-2	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to recognize that the way things are expressed or written affects others	Identify that pictures and written and/or verbal words have meaning	Recognize, with support, how things expressed or written affect others	Recognize and determine that the way things are expressed or written affects others	Describe how expressed ideas affect others and the way others' ideas may affect them
Students will be able to describe and analyze information from others' verbal and/or nonverbal communications, responding appropriately in most settings	Describe others' verbal and/or nonverbal communications, with support	Describe others' verbal and/or nonverbal communications and respond appropriately in familiar settings	Describe and explain information from others' verbal and/or nonverbal communications, responding appropriately in most settings	Describe and explain the reason for others' verbal and/or nonverbal communications, responding appropriately in both familiar and unfamiliar settings

COMMUNICATION

3-5	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to differentiate and share specific information appropriate to the environment and/or audience	Describe the difference between general and specific communication Experiment with different types of communication methods (written, oral, digital, picture symbols, etc.) to learn features of them	Decide what kind of information should and should not be shared with audience Identify the benefits of different communication methods	Distinguish the needs of the audience and/or environment to present information Determine the correct method of communication for the audience/environment	Adjust the delivery and method of communication as the needs of the audience fluctuate Demonstrate awareness when engaging with people from other cultures
Students will be able to integrate meaning from other's verbal and/or nonverbal communication by responding purposefully within a given context	Identify the meanings of others' communication and respond	Evaluate meaning from others' verbal and/or nonverbal communication and respond purposefully	Integrate meaning from others' verbal and/or nonverbal communication by responding purposefully within a given context	Generate and explain meaning from others' verbal and/or nonverbal communication and respond purposefully within a given context

COMMUNICATION

6-8	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to organize and express purposeful information in a modality appropriate to the environment and audience	Describe and organize information in different formats	Describe information and relationships between pieces of information in different formats to an audience	Organize and express purposeful information appropriate to the environment and audience	Organize and express purposeful information appropriate to the environment and audience while revising thinking based on audience feedback
Students will be able to interpret meaning from others' communications and respond effectively within different contexts	Distinguish between communicated ideas Sort through communicated ideas to process their own thinking	Identify categories of information from communicated ideas Process communicated ideas to construct a purposeful response	Interpret meaning from others' communications Respond effectively within different contexts	Draw conclusions and predict outcomes based on other's communication Use their own conclusions and predictions to form an arguable stance

COMMUNICATION

9-12	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to develop and initiate communication through a variety of modalities appropriate for different environments and audiences	Specify communications that are appropriate to a designated environment and audience	Adapt communication modalities to fit the needs of the audience and environment	Develop and initiate communication through a variety of styles appropriate for different environments and audiences	Investigate different forms of communication, such as formal versus informal, to resolve and overcome obstacles for various audiences and environments
Students will be able to interpret meaning from others' communications, adapt their responses and apply understanding in relevant contexts	Discern meaning from others' communications Distinguish appropriate responses based on their understanding of the specific context	Classify meaning from others' communications Adapt their responses appropriately to relevant contexts	Interpret meaning from others' communications Adapt their responses and apply understanding in relevant contexts	Think through implications of meanings from others communications Develop responses to properly apply and clearly communicate in different contexts

COMMUNICATION

Postsecondary	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to generate and initiate communication effectively and professionally, through a variety of modalities, adapting their understanding with application to novel concepts, forms and contexts within various environments and audiences	Determine and decide the intended meanings from others' communications and develop and/or select a strategy for responding using different professional modalities	Selectively choose a form of communication to reach a specified audience and goal and adjust based on results	Generate and initiate communication effectively and professionally, through a variety of modalities, adapting their understanding with application to novel concepts, forms and contexts within various environments and audiences	Think through implications of complex communication scenarios, develop creative communication strategies and determine solutions for communication challenges in an advancing society
Lifelong learners will be able to consistently evaluate the meaning of others' communications, modify responses and effectively communicate within a global and technologically advancing society	Experiment with and clarify the intended meanings from others' communication Develop their responses to properly communicate using different modalities	Predict and clarify intended meanings of others' communications Generate responses based on new methods of information sharing	Consistently evaluate the meaning of others' communications Modify responses to others' communications in order to effectively communicate within a global and technologically advancing society	Think through the implications and meaning of complex messages in both professional and nonprofessional settings Select the best method of communication to deliver messages and creatively use new and evolving forms of communication in order to resolve challenges

CRITICAL THINKING AND PROBLEM SOLVING

Access, evaluate and analyze information to make informed decisions, recognize bias and find solutions.

Pre-K	Emerging Competence	Approaching Competence	Competent	Extending Competence
With support, students will be able to identify, categorize and sequence information to make choices based on new learning and real-life experiences	Recognize that action is needed to solve a problem	Seek appropriate support people and state the problem in a constructive way	Demonstrate, with support, appropriate action to solve the problem	Complete the action independently

CRITICAL THINKING AND PROBLEM SOLVING

K-2	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to find key information, make inferences and form generalizations	Search for and collect information	Separate relevant from non-relevant information	Utilize the relevant information to make inferences and form generalizations	Compare your generalizations with those of others
Students will be able to explain reasons for making a decision based on new learning and real-life experiences	Demonstrate use of previously-known information	Combine newly-learned information with previously-known information to reach a decision	Describe how or why the decision was made	Compare and contrast individual decisions with the decisions of others

CRITICAL THINKING AND PROBLEM SOLVING

3-5	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to evaluate the relevance and importance of key information presented from a variety of reliable sources to justify solutions and claims	Find information from provided sources List useful ideas Generate a partial solution	Select important information from provided sources Choose ideas from one source Generate a solution	Prioritize the importance of information Combine ideas from two reliable resources Generate a solution	Prioritize the relevance and importance of key information Combine ideas from three or more reliable resources Generate two or more solutions
Students will be able to consider multiple sides of an issue, seek alternative solutions and make decisions based on new learning	Identify more than one side of an issue Generate steps towards a solution	Describe more than one side of an issue Organize ideas to find a solution using prior knowledge or learned information	Organize multiple ideas and perspectives of an issue Utilize new and learned information to make decisions and find multiple solutions	Evaluate multiple perspectives of an issue to justify solutions Make decisions based on new learning

CRITICAL THINKING AND PROBLEM SOLVING

6-8	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to analyze and select key information and data from a variety of reliable sources to solve problems in a variety of situations across contexts	Identify key components of a problem Generate viable solutions to a problem List information from credible sources	Understand and demonstrate key components of a simple problem Choose viable solution(s) Use credible sources	Assess all components of a complex problem Justify viable solution(s) Cite evidence from multiple sources	Investigate multiple perspectives from credible resources Determine how solutions are applied to multiple scenarios based on new ideas, and thoughts Select most relevant evidence to formulate an optimal solution
Students will be able to critique issues, identify constraints and barriers and evaluate multiple perspectives to make and defend judgments and actions	Use concrete statements to describe key elements of an issue Make a judgement List obstacles	Ask questions to understand elements of an issue Develop a credible judgment Categorize obstacles and determine an action plan	Reflect and generate additional questions based on self- and/ or group-evaluation Identify obstacles from multiple perspectives Defend judgements and actions	Evaluate self and group perspectives Examine biases to predict obstacles Explain credible judgements and actions from various points of view

CRITICAL THINKING AND PROBLEM SOLVING

9-12	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to analyze and synthesize multiple perspectives of an issue to solve problems and be able to cite valid, reliable data and evidence that apply in a variety of situations across contexts	Acknowledge problems can have multiple perspectives Identify sources and resources to gather information and ideas Demonstrate how to find evidence	Identify multiple perspectives of an identified problem Collect information and ideas on potential solutions Gather sources of evidence and identify valid resources	Analyze multiple perspectives to solve a problem Synthesize ideas to solve a problem Cite evidence from multiple valid and reliable sources to solve a problem	Establish the most viable conclusions and solutions Implement ideas to realize solutions Integrate and document resources and knowledge to execute solutions
Students will be able to evaluate and defend their thinking, adjust their ideas based on new learning and create viable solutions to complex problems in unique and evolving situations	Identify ideas of self and others Demonstrate awareness of personal ideas and ideas of others Create a solution to a problem using information from credible sources	Establish ideas based on current thinking and points of view Formulate ideas of self and others Understand and demonstrate key components of a problem to generate a viable solution from a credible resource	Evaluate and defend thinking by describing the facts behind their point of view Develop questions that expand former thinking Elaborate about reasonable solutions	Explain the process of evaluating and defending ideas and perspectives Expand thoughts to infer new generalization of ideas Differentiate between viable and non-viable solutions and pursue realistic solutions

CRITICAL THINKING AND PROBLEM SOLVING

Postsecondary	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to investigate and take a stance on complex issues, making sure to address bias in information and beliefs and propose and defend solutions that lead to deliberate choices and actions	Explore issues Acknowledge different sides to issues exist Define bias Acknowledge multiple solutions could exist	Investigate issues using a variety of resources State different sides of an issue Recognize bias by differentiating facts from opinions Suggest different solutions	Investigate issues utilizing a variety of reliable resources Propose and defend solutions based on the evidence collected Address bias internally and externally Propose and defend solution(s)	Investigate issues utilizing reliable resources from multiple perspectives Articulate implications and their impact on solutions Explain bias Implement solution(s)

CREATIVITY AND INNOVATION

Imagine, visualize and demonstrate creative practices, innovative solutions and artistic expression.

Pre-K	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to use their imaginations in creative play	Imitate real-life actions appropriately with adult support Recognize others' play actions	Imitate and adapt real-life play, with minimal support Demonstrate increasingly positive interactions with others during play	Understand and engage in appropriate play using real-life and imaginary scenarios Participate in a variety of play scenarios alongside others	Initiate real-life and imaginary play scenarios with others Adjust interactions to accommodate others' feelings in a variety of creative play

CREATIVITY AND INNOVATION

K-2	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to use their imaginations, creatively explore new ideas and make original creations	Show interest in exploring new ideas with adult support Reproduce a model with new approaches or materials	Use ideas in new ways in a familiar or teacher-directed activities Categorize existing materials and reject less successful choices to make a product, process or solution	Explore a new idea or question using their imagination Create a product, process, or solution using their imagination	Evaluate creative process and product using a set criteria Extend a new idea to create a product, process or solution through cooperatively integrating others' ideas and perspectives

CREATIVITY AND INNOVATION

3-5	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to identify a need and brainstorm ideas within a group to design unique solutions and artistic expressions	Participate in discussions to identify needs or ideas Explore product, process or solution and considers novel approaches independently or collaboratively Recognize and contributes individual interests and strengths to design and develop an artistic expression or a solution	Identify a need or idea independently or collaboratively Recognize that there are different perspectives when identifying needs and ideas for designing a product, process or solution Recognize individual strengths, artistic expression and potential contributions to the project independently	Integrate others' ideas and perspectives to collaboratively identify a need or unique idea Integrate others' ideas and perspectives to collaboratively design a product, process or solution Contribute individual interests and strengths to design and develop a unique artistic expression or a solution	Initiate and seek input and information from a variety of sources to identify a need or unique idea Predict consequences of varying approaches while investigating a product, process or solution Evaluate results and adjust the design process for varying artistic expressions or solutions

CREATIVITY AND INNOVATION

6-8	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to think abstractly in creative and artistic endeavors while recognizing their own strengths and the divergent contributions of other group members	Discern essential from non-essential concepts to determine those that are real but not directly tied to a concrete object using a predetermined framework Participate in a collaborative group with limited determination of roles or strengths using a predetermined framework	Discern essential from non-essential concepts to determine those that are real but not directly tied to a concrete object Participate in a collaborative group with limited determination of roles or strengths independently	Determine creative or artistic concepts that are real but not directly tied to a concrete object Integrate personal creative or artistic strengths with others to support a collaborative team	Generate creative or artistic concepts that are more abstract than concrete Model various roles within the group and leverages strengths of others

CREATIVITY AND INNOVATION

9-12	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to collaboratively complete creative design/innovation projects that are vision-inspired and focused on the user experience	Participate in collaboration on project design with a predetermined framework Investigate new ideas or improvements with predictable ideas Develop steps to establish usability, purpose and functionality Construct a project where several design elements are unconnected	Collaborate to plan a creative or innovative project Organize conventional ideas in non-predictable ways Create a project that has some feasibility or applicability Construct a project with interesting elements that may be connected to the final use	Collaborate to complete a creative or innovative project Expand design conventions or uses common materials in new, clever or surprising ways Produce a creative design or project that appeals to the user experience Craft a complete project designed with a distinct style which applies to the identified purpose	Engage in student-guided collaboration where teammates are challenged to develop and complete a creative or innovative project Execute an unconventional design using familiar materials in new ways resulting in a unique end project Produce a project that focuses on applicability to the user experience or society Craft a project that has an innovative and striking design that is vision-inspired, well-crafted and exceeds expectations for purpose
Students will be able to identify a meaningful problem or opportunity, explore creative solutions with a team, produce original work and determine the best design to meet specific needs, testing and revising as necessary	Determine and research innovative concepts and others' innovations Clarify the problem within a group Identify innovations and their impacts using an existing framework Use a predetermined testing protocol and makes revisions to project without seeking feedback	Develop ideas about the purpose for innovation Imagine solutions to a problem in a collaborative setting while acknowledging others' perspectives Evaluate the ideas and solutions of others before selecting one Use an existing framework and feedback to test and revise project	Evaluate decisions regarding the purpose driving the process of innovation Generate different and creative perspectives during gathering of information Create a plan to investigate and evaluate different ideas and determine the best solution Utilize testing and revision to generate a well-crafted, useful project that is unique, surprising or inspiring	Explore and expands on the purpose for innovation Promote ways that divergent and creative perspectives impact creativity and innovation Investigate, experiment and test other implications or applications for the selected solution Evaluate the significance of well-crafted projects that are unique, surpringing, inspiring or positively affect society

CREATIVITY AND INNOVATION

Postsecondary	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to collaborate and problem solve in order to complete and manage real-world original or innovative projects	Recognize the value of collaboration and engages in creative decision making Construct a project that meets expectations for purpose Participate in collaboration to complete projects in a timely manner	Collaborate to problem solve and considers options when making creative decisions Produce an original or innovative project with a shared vision that meets expectations for purpose Engage in collaboration to complete projects in a timely manner	Collaborate in a variety of settings to problem solve and engage in creative decision making Craft an original and innovative project with a shared vision that exceeds expectations for purpose Manage collaboration to complete projects in a timely manner	Initiate a collaborative setting to generate creative decisions Distribute a real-world, innovative project with a shared vision that exceeds expectations for purpose Facilitate and monitor the creative and innovative process to reflect, revise and evaluate in a timely manner
Lifelong learners will be able to revolutionize and positively affect society as a result of their creative and innovative efforts	Identify needs based on social themes and historical context Recognize the need for well-crafted projects in society that are unique, surprising or inspiring	Investigate social themes, historical context and cultural components to identify user needs Explore the social impact of well-crafted projects that are unique, surprising or inspiring	Reflect on social themes, historical context and cultural components in order to transform information and ideas into creative solutions Evaluate continuously the significance of well-crafted projects that are unique, surprising, inspiring and revolutionary to positively affect society	Predict needs and synthesizes creative solutions while continually evaluating the value of the innovation for society Inspire others to innovate and design well-crafted projects or ideas that are unique, surprising, inspiring and revolutionary to positively affect society

COLLABORATION AND TEAMWORK

Contribute ideas, perspectives and experiences to cultivate a community of shared accountability and leadership.

Pre-K	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to engage in cooperative play and transition between activities and settings	Recognize whether an activity is solo or cooperative Identify the beginning and ending of an activity State which activities are done in various settings	Participate in solo and cooperative activities Interact with others during activities Model expected behaviors when transitioning between activities and settings	Engage in cooperative play by interacting with other people Differentiate behaviors for various activities and settings Perform expected behaviors consistently when transitioning between activities	Initiate and engage in cooperative play with others Adapt to unfamiliar activities and settings by using past knowledge Identify transitions between new or unfamiliar activities by using past knowledge
Students will be able to adapt to situations and make decisions while interacting with others	Identify similarities and differences for many types of people interacted with on a daily basis Identify the different types of relationships between self and others	Evaluate different types of interactions with others, including positive/ negative, formal/informal, small/large group, etc Select appropriate behavior based upon different interactions with others	Establish guidelines to identify obstacles when interacting with others Plan solutions to overcome obstacles when interacting with others	Recognize opportunities to generate ideas for how to work with others in new situations Try ideas for interacting with others in new situations

COLLABORATION AND TEAMWORK

K-2	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to follow group norms while working, playing and completing tasks and projects with peers	Identify on-task and off-task group behavior while working and playing Recognize the procedures to participate in projects alone and with a group	Display expected behavior while working and playing with limited teacher prompting Participate in projects individually and with groups while following procedures with limited prompting	Follow expected group behavior while working and playing Complete projects individually and in groups while following procedures without prompting	Model expected group behavior in different situations when working and playing Demonstrate expected behavior while transitioning into other assignments and projects
Students will be able to promote individual and shared outcomes while engaging in mutual feedback	Recognize the difference between individual and group needs Identify and label how you react to the positive and challenging behaviors of others	Practice meeting both individual and group needs Acknowledge how others react to your behavior in both positive and challenging ways and adjust behaviors to contribute to the team	Promote individual and group needs in a collaborative way Engage in mutual feedback by recognizing how group members' behaviors impact others while meeting the needs of the group	Cooperate in different group settings Evaluate and critique the impact of feedback both individually and in a group

COLLABORATION AND TEAMWORK

3-5	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to contribute to the development of group norms, build on the ideas of others and encourage equitable participation when working in a collaborative group	Participate in established group expectations Add own ideas to group activities Listen to the contributions of others in a group	Evaluate group expectations Revise individual ideas to align with group expectations and activities Participate in the group while collaborating with others	Contribute to the development of group expectations Build on the ideas of others when working within a group Encourage equitable participation when working in a collaborative group	Develop a strategy to ensure equitable collaboration when establishing group expectations Expand upon and adapt personal contribution to generate new ideas for the group Recognize and resolve obstacles to ensure equitable participation within the collaborative group
Students will be able to take on a given role, encourage others to complete necessary goals and apply problem-solving practices for high-level outcomes	Explore different roles within a group and recognize the functions of each role Discuss possible solutions to problems that may arise when working with others	Understand various roles within a group and take on a given role to reach group goals Practice probable solutions to specific challenges that arise while working collaboratively with others	Determine individual roles while encouraging each other to complete group goals Utilize problem-solving practices to achieve positive outcomes while working collaboratively with others	Recognize obstacles and adapt group roles and strategies to overcome obstacles and achieve group goals Investigate problem-solving practices and solutions to determine the best course of action for achieving successful outcomes while working with others

COLLABORATION AND TEAMWORK

6-8	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to create appropriate group norms by preparing in advance for effective collaboration and engage by taking ownership of their individual responsibilities for a given role	Evaluate ideas for group norms in advance of collaboration Perform individual responsibilities in a collaborative group	Elaborate upon the ideas of others for group norms in advance of collaboration Critique actions to meet needs of individual responsibilities for a collaborative role	Establish appropriate group norms in advance of collaboration Enhance individual engagement by predicting how to meet the needs of that individual role	Generate new ideas for group norms in various settings Engage by taking ownership of individual responsibilities and supporting others in their roles
Students will be able to negotiate problem-solving practices through the solicitation of team members' perspectives and lead when appropriate to accomplish shared group goals	Establish possible solutions when negotiating a problem Participate within a team to accomplish shared goals	Predict solutions and come to a consensus to negotiate problem-solving when working as a team Collaborate with team members to create shared goals	Solve problems by using team members' perspectives to reach an agreement Lead team when appropriate to accomplish and create shared group goals	Develop solutions to multiple problems when leading a team Facilitate the development of group goals with the intention to include diverse perspectives when negotiating solutions to multiple problems

COLLABORATION AND TEAMWORK

9-12	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to contribute to and work effectively in teams by leveraging various tools and resources, adapting to multiple roles and facilitating connections of diverse perspectives to accomplish shared goals	Identify what it means to contribute as an effective team member Select various tools to utilize as a team to accomplish shared goals Recognize there are multiple roles within a team Acknowledge your own perspective and how it fits in with the team to accomplish shared goals	Practice what it means to contribute as an effective team member Establish criteria for which tools are most useful to the team Develop a strategy for supporting and performing various roles within the team Understand the importance of diverse perspectives within a team to help accomplish shared goals	Contribute in specific ways and work effectively in teams Leverage various tools and resources to accomplish shared goals Perform and adapt to multiple roles within a team as needed Facilitate connections of diverse perspectives to accomplish shared goals	Experiment in ways that stretch you as a contributor within a team Research new tools and resources Generate and practice new roles within a team Distinguish and explain features of diverse perspectives that helped accomplish shared goals
Students will be able to create shared responsibility for collaborative work and value the individual contributions made by each team member to cultivate a culture of community	Set goals for assigned role in collaborative work Make a plan aligned to expectations for fulfilling specific roles and establish criteria for successful individual contributions	Reach individual goals within a collaborative work setting Recognize obstacles to individual contributions that can be removed and adapt accordingly to build group cohesiveness	Create shared responsibility in working collaboratively toward group goals Respect and acknowledge the individual contributions made by each team member to cultivate a culture of community	Research and implement best practices for participating in collaborative work experiences Distinguish features of collaborative communities and how to deliberately support individuals in the future

COLLABORATION AND TEAMWORK

Postsecondary	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to create, contribute and analyze the work of diverse teams in a variety of contexts by vetting current and evolving tools and resources, adapting to multiple roles and connecting various perspectives to accomplish a shared goal	Evaluate the work of diverse teams and roles in consideration of various perspectives Organize tools and resources for use across various contexts Proactively navigate opportunities to leverage individual strengths while developing shared goals	Establish criteria for incorporating various perspectives into multiple roles within a diverse team Analyze tools and resources for effectiveness across various contexts Distinguish the use of essential information, such as vetting resources and integrating multiple roles to identify a shared goal	Adapt the work of diverse teams and multiple roles in response to various perspectives both within and beyond the group Establish criteria for the effectiveness of current and evolving tools and resources for use across diverse teams and various contexts Recognize obstacles for the use of essential information, such as vetting resources for multiple roles to develop shared goals	Predict the work of diverse teams and multiple roles in response to various perspectives both within and beyond the group Generate a comprehensive bank of current and evolving tools and resources for use across diverse teams and various contexts Explain the impact of obstacles in relation to vetting resources and various perspectives for multiple roles in the accomplishment of shared goals
Lifelong learners will be able to elevate the work of others, share ownership of collaborative work, value the individual contributions made by each team member and create cultures of community in a variety of situations	Utilize work of others Assume responsibility and ownership for individual role Recognize contributions of some members Contribute to the culture of community by identifying and sharing values and expectations to be used as norms that contribute to a culture of community	Elaborate on the work of others Actively incorporates individual contributions into collective work Recognize contributions by all members Foster a culture of community by referencing and referring to team culture and norms in a variety of situations	Highlight and emphasize the work of others Assume collective ownership of the work with all members of the team Appreciate contributions of all members Champion and defend the community of culture in a variety of situations	Develop arguments to promote contributions of others Share ownership by acknowledging the interdependent nature of the collaborative work Praise and critique contributions of all members Evaluate team dynamics in new groups and develop strategies to promote a culture of community

HONESTY, INTEGRITY AND RESPONSIBILITY

Are trustworthy, ethical, reliable and are accountable for the results they produce.

Pre-K	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to know the difference between a truth and a lie, while practicing truthfulness	Recognize, with guidance, when something is the truth	Describe what it means to tell the truth	Compare the difference between a truth and a lie while practicing truthfulness	Explain why telling truth is important
Students will be able to begin work and follow directions	Understand where to start work Listen to directions	Begin work with guidance Follow directions with guidance	Begin work independently Follow directions	Complete work independently Be an example in following directions

HONESTY, INTEGRITY AND RESPONSIBILITY

K-2	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to make sense of a situation by recalling what did and did not happen and express their emotions appropriately	Observe what happens in a situation Recognize emotions	Recognize what happens in a situation Identify personal emotions and those of others	Make sense of a situation by recalling what did and did not happen Express emotions appropriately	Analyze a situation from a different viewpoint Support others to express emotions appropriately
Students will be able to take ownership for their actions and complete tasks	Recognize with guidance how actions affect others Begin work with guidance on assigned tasks	Recognize how actions affect others Work on assigned tasks	Take ownership for personal actions Complete tasks	Predict how personal actions could affect others Help others complete tasks

HONESTY, INTEGRITY AND RESPONSIBILITY

3-5	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to assess a situation, apply empathy and articulate how their choices have positive and negative outcomes	Describe a situation Understand empathy Explain the impact of a choice	Summarize key details of a situation Recognize how to use empathy Describe possible outcomes of choices	Assess a situation Apply empathy Articulate how choices have positive and negative outcomes	Predict appropriate ways to respond to a situation Investigate ways to show empathy Reflect on choices and determine ways to avoid negative outcomes
Students will be able to identify the action steps needed to complete commitments, meet responsibilities and contribute productively to a group	Recognize beginning steps needed to complete commitments Describe responsibilities Recognize the various roles in the group	Follow suggested action steps needed to complete commitments Work to fulfill responsibilities Practice assigned role with guidance	Identify and create action steps needed to complete commitments Meet responsibilities Contribute productively to a group	Evaluate and adjust action steps throughout the process to complete commitments Exceed responsibilities and expectations by helping others Reflect on contribution to the group and adjust as needed

HONESTY, INTEGRITY AND RESPONSIBILITY

6-8	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to recognize and acknowledge that their choices have intended and unintended outcomes now and in the future	Recognize how to use empathy Describe possible outcomes of choices	Apply empathy Acknowledge that choices have intended and unintended outcomes	Investigate alternative ways to show empathy Recognize and acknowledge choices have intended and unintended outcomes now and in the future	Display empathy while making decisions Determine the best choices based on possible outcomes
Students will be able to be proactive, organized and accountable in order to complete responsibilities, in addition to making contributions that positively impact their peers	Complete responsibilities Understand that contributions will impact peers	Evaluate the best way to complete responsibilities Predict how contributions will impact peers	Be proactive, organized and accountable when completing responsibilities Make contributions that positively impact peers	Predict implications of completed responsibilities Invite others to positively impact peers

HONESTY, INTEGRITY AND RESPONSIBILITY

9-12	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to display empathy while making decisions, be accountable for their actions and consider the implications of their choices	Explain empathy Understand personal responsibility for actions Recognize that choices have implications for others	Recognize actions that show empathy while making decisions Accept responsibility for actions Reflect on another's perspective	Display empathy while making decisions Demonstrate accountability for actions Consider the implications of choices and how they affect others	Perceive broader impact of empathy on community or society Encourage accountable behaviors in others Use feedback to set goals and monitor choices in a variety of settings
Students will be able to follow through on commitments and make contributions that positively impact their peers and community	Accept given responsibilities Understand that contributions will impact peers and community	Make commitments to fulfill responsibilities Predict how contributions will impact peers and community	Follow through on commitments Make contributions that positively impact their peers and community	Use strategies to follow through on commitments Invite others to positively impact peers and community

HONESTY, INTEGRITY AND RESPONSIBILITY

Postsecondary	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to make decisions with intention and take accountability for their actions while modeling and advocating for others to do the same	Contemplate outcomes and display empathy when making decisions Take accountability for actions	Establish criteria when making decisions Model accountability for actions with others	Make decisions with intention using criteria Take accountability for actions while modeling and advocating for others to do the same	Make decisions with intention using established, self-identified criteria Use the opportunity to take accountability for actions to self-reflect and seek personal growth while advocating for others to do the same
Lifelong learners will be able to manage their time effectively in order to follow through on commitments and make contributions that positively impact their peers, community and global society	Follow through on commitments Understand that contributions will impact peers, community and global society	Determine strategies to effectively manage time to follow through on commitments Predict how contributions will impact peers, community and global society	Manage time effectively to follow through on commitments Make contributions that positively impact peers, community and global society	Theorize potential improvements while planning to follow through on commitments Invite others to positively impact peers, community and global society

HARD WORK AND RESILIENCE

Set personal goals, apply best efforts to achieve them and persevere when faced with challenges and setbacks. Have a well-grounded sense of confidence, optimism and self-efficacy.

Pre-K	Emerging Competence	Approaching Competence	Competent	Extending Competence
With support, students will be able to achieve adult-provided goals	State the actions toward achieving a given goal, with support	Take steps toward achieving a given goal	Complete a given goal, with support	Select the next goal from a list of given goals
Students will be able to develop maintained focus, with support, on tasks requiring more than one attempt and understand that choices matter and have consequences	Identify the purpose of focus Match choices with possible consequences or outcomes	Describe, with support, how focus helps to complete a task and practice attempting a repeated task State examples from their own experience of choices and possible consequences or outcomes	Develop persistence while attempting a repeated task, with support Describe the effects or outcomes of a choice	Demonstrate flexibility and focus while attempting a repeated task with minimum support Explain the relationship between consequences and choices

HARD WORK AND RESILIENCE

K-2	Emerging Competence	Approaching Competence	Competent	Extending Competence
With support, students will be able to set short-term personal and educational goals	Recognize the basic definition/idea of a goal	Identify and sort a generalized list of personal goals and educational goals	Name a current personal and educational goal, developed with adult support	Describe who, what, when and where of a current personal and educational goal, established with adult support
Students will be able to have age-appropriate, consistent educational interests while beginning to develop awareness and control of themselves and their social environments	List educational subjects or topics Identify ways to show self-control	Rank educational subjects or topics in order of preference Practice, with support, showing self-control with others	Describe an educational subject or topic that is interesting to the individual student Demonstrate self-control with others	Describe and provide reasons why an educational subject or topic is interesting to the individual student Recognize and explain a situation where a student displayed self-control with others

HARD WORK AND RESILIENCE

3-5	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to set and achieve short and long-term educational and personal goals, with prompting	Identify personal and educational goals, with prompting	Describe short- and long-term educational and personal goals, with prompting	Make and complete short- and long-term educational and personal goals, with prompting	Develop and complete short- and long-term educational and personal goals and reflect on the outcomes
Students will be able to understand that the learning process is increasingly challenging, requiring consistent interest and persistent effort through developing self-control and intrinsic motivation	Recognize that the learning process becomes increasingly challenging and will require consistent interest and persistent effort Identify what self-control and intrinsic motivation look like	Describe how the learning process is increasingly challenging while explaining how consistent interest and persistent effort leads to success State how self-control and intrinsic motivation lead to success	Describe how the learning process is increasingly challenging and represent how consistent interest and persistent effort leads to success Demonstrate self-control and intrinsic motivation to complete tasks	Differentiate between simpler and more challenging tasks while recognizing that consistent interest and persistent effort can be called productive struggle Model self-control and intrinsic motivation to ensure tasks are done on time and successfully

HARD WORK AND RESILIENCE

6-8	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to design and implement educational and personal goals as well as begin to monitor and adjust with minimal prompting while beginning to explore occupational goals	List educational and personal goals Identify ways goals could be measured, with minimal prompting	Establish criteria for educational and personal goals with measurable outcomes while reflecting on long-term ideas for their future Adapt the goals on personal reflection, recognize possible obstacles	Develop educational and personal goals with measureable outcomes and begin to explore ocupational goals Monitor and edit the goals with minimal prompting	Design educational, personal and occupational goals with measurable outcomes which reflect long-term ideas for their future Evaluate and adapt the goals, recognizing possible obstacles
Students will be able to engage in "productive struggle" while continuing to understand and apply consistent interest, persistent effort and self-efficacy as they explore their boundaries and motivations within their environment	Identify what productive struggle is and explain ways in which consistent interest, persistent effort and self-efficacy lead to success Describe what boundaries look like and how they might differ between environments	Describe examples in which productive struggle takes place with consistent interest, persistent effort and self-efficacy Distinguish their boundaries and motivations within their environment	Demonstrate productive struggle with consistent interest, persistent effort and self-efficacy Investigate their boundaries and motivations within their environment	Develop experience in "productive struggle" while establishing consistent interest, persistent effort and self-efficacy Think through the implications of personal boundaries and defend your choices of where your boundaries lie

HARD WORK AND RESILIENCE

9-12	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to design, implement, monitor and adjust measurable, multi-step educational, occupational and personal goals	Identify measurable educational, occupational and personal goals Organize goals into educational, occupational and personal categories	Decide measurable educational, occupational and personal goals with criteria established to measure success Recognize possible obstacles to the goals	Develop measurable and multi-step educational, occupational and personal goals with criteria established to measure success Adapt as new obstacles are observed to the goal	Generate several measurable multi-step educational, occupational and personal goals with criteria established to measure success Predict future obstacles to educational, occupational and personal goals
Students will be able to engage in "productive struggle" with consistent interest, persistent effort and self-efficacy as they refine their boundaries and motivations within their environment	Recognize opportunities for "productive struggle" and persistent effort in one's individual experiences Describe motivations for success	Establish criteria for "productive struggle" and persistent effort in learning from one's individual experiences Evaluate motivations for success	Develop purposeful effort with a sustained interest in learning Adjust, as needed, motivations for success	Explain self-efficacy and resilience as it relates to individual choices and experiences Predict motivations needed for success

HARD WORK AND RESILIENCE

Postsecondary	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to design, implement, monitor and adjust measurable, multifaceted educational, occupational and personal goals as they transfer their knowledge and skills to a variety of work and life events	Decide educational, occupational and personal goals with criteria established to measure success Predict possible knowledge and skills needed to a variety of work and life events	Develop educational, occupational and personal goals with criteria established to measure success Defend choices for the knowledge and skills needed to a variety of work and life events	Experiment with educational, occupational and personal goals with criteria established to measure success Test knowledge and skills through a variety of work and life events	Explain specific successes within their educational, occupational and personal goals Research the consequences of choices to discover different possible solutions to a variety of work and life events
Lifelong learners will be able to apply previous experiences of "productive struggle" to continue growing while managing boundaries and motivations within their environment	Recognize obstacles to "productive struggle" from previous experiences Establish boundaries and motivations needed for success within their environment	Generate specific goals to grow and learn from previous experiences Predict what boundaries and motivations are needed for success within their environments	Explain how "productive struggle" helps them to continue to grow and learn from their previous experiences Explain boundaries and motivations within their environment for success	Think through how "productive struggle" helps them learn from previous experiences Distinguish features of boundaries and motivations that help one achieve personal success

LIFELONG LEARNING AND PERSONAL GROWTH

Continue to seek knowledge and develop skills in all settings.

Pre-K	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to explore their environments and engage in learning opportunities	Explore familiar environments through guided opportunities for discovery	Explore familiar environments by interacting with other learners during opportunities to develop discovery	Explore familiar and unfamiliar environments by interacting independently during opportunities to display discovery	Explore additional unfamiliar environments by expressing motivation for learning and interacting with other learners during opportunities for discovery

LIFELONG LEARNING AND PERSONAL GROWTH

K-2	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to understand the purpose of personal improvement through goal-setting to increase knowledge, build decision-making skills and develop values across settings	Express awareness of self-improvement through identifying goals, increasing knowledge, practicing decision-making skills and exploring personal values across familiar environments	Express interest for self-improvement through guided goal setting, increasing knowledge, understanding decision-making skills and exploring personal values across familiar environments	Express the benefit for self-improvement through goal setting, increasing knowledge, improving decision-making skills and establishing personal values across familiar and unfamiliar environments	Apply self-improvement strategies through targeted goal setting, increasing knowledge, strengthening decision-making skills and establishing and reflecting on personal values across familiar and unfamiliar environments

LIFELONG LEARNING AND PERSONAL GROWTH

3-5	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to experience personal growth through self-direction and goal-setting to apply knowledge, skills and values to inform ideas and actions across settings	Experience personal growth by recognizing available opportunities and applying goals, knowledge, skills and values to establish ideas and behaviors across familiar settings	Experience personal growth by choosing to participate in available opportunities and applying goals, knowledge, skills and values to inform ideas and behaviors across a variety of familiar settings	Experience personal growth by sharing reasons for participating in available opportunities and applying goals, knowledge, skills and values to inform ideas and behavior across familiar and unfamiliar settings	Experience personal growth by adjusting decisions to participate in available opportunities and predict the application of goals, knowledge, skills and values to direct ideas and behaviors across familiar and unfamiliar settings

LIFELONG LEARNING AND PERSONAL GROWTH

6-8	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to develop personal growth through self-direction and goal-setting to utilize knowledge, skills and values to influence ideas and actions across settings	Develop personal growth by recognizing goals, knowledge, skills and values to influence ideas and actions across familiar settings	Develop personal growth by constructing goals, knowledge, skills and values to influence ideas and actions across familiar settings	Develop personal growth by utilizing goals, knowledge, skills and values to influence ideas and actions across familiar settings	Develop personal growth by integrating goals, knowledge, skills and values to impact ideas and actions across familiar and unfamiliar settings

LIFELONG LEARNING AND PERSONAL GROWTH

9-12	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to demonstrate personal growth through setting, monitoring and achieving goals to pursue knowledge, skills and values to guide ideas and actions across settings	Demonstrate personal growth by selecting goals, knowledge, skills and values to practice ideas and actions across a variety of familiar settings	Demonstrate personal growth by pursuing goals, knowledge, skills and values to guide ideas and actions across familiar and unfamiliar settings	Demonstrate personal growth by pursuing, monitoring and achieving goals, knowledge, skills and values to guide ideas and actions across a variety of familiar and unfamiliar settings	Demonstrate personal growth by modifying goals, knowledge, skills and values based on monitoring of progress to direct ideas and actions across a variety of familiar and unfamiliar settings

LIFELONG LEARNING AND PERSONAL GROWTH

Postsecondary	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners continuously pursue personal growth by setting and reflecting on goals to advance knowledge, skills and values to optimize decision-making across settings	Pursue lifelong learning by expanding personal growth opportunities, independent of outside influences, by establishing personal goals and advancing knowledge, skills and values to make decisions across unfamiliar settings	Pursue lifelong learning by experimenting with personal growth opportunities through assessing personal goals and advancing knowledge, skills and values to improve decision-making across unforseen settings	Pursue lifelong learning by reflecting on personal growth opportunities and goals while advancing and appraising knowledge, skills and values to optimize decision-making across all settings	Pursue lifelong learning by prioritizing personal growth and goals, investigating new opportunities and connecting knowledge, skills, and values to enhance decision-making in order to adapt to any setting

SERVICE

Seek opportunities to help when assistance is needed and act without expecting compensation or recognition.

Pre-K	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to, with prompting and support, show kindness through their words and actions as they help and serve in their home and classroom	Recognize examples of kind words and actions with prompting and support Recognize examples of helping and serving in their home and classroom with prompting and support	Plan to show kindness by using words and actions with prompting and support Plan to help and serve in their home and classroom with prompting and support	Show kindness through their words and actions with prompting and support Help and serve in their home and classroom with prompting and support	Encourage others to show kindness through words and actions with prompting and support Invite and encourage others to help and serve in their home and classroom with prompting and support

SERVICE

K-2	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to proactively show kindness through their words and actions as they help and serve in their school and local community	Identify kind words and actions Identify examples of helping and serving in their school and local community	Plan to show kindness through words and actions Plan to help and serve in their school and local community	Choose to show kindness through words and actions Choose to help and serve in their school and local community	Encourage others to show kindness through words and actions Invite and encourage others to help and serve in their school and local community

SERVICE

3-5	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to proactively show compassion by identifying, with support, informal service opportunities where assistance is needed	Develop compassion by describing, with support, informal service opportunities where assistance is needed	Develop compassion by providing examples, with support, of informal service opportunities where assistance is needed	Choose to show compassion by identifying, with support, informal service opportunities where assistance is needed	Choose to show compassion by selecting informal service opportunities where assistance is needed
Students will be able to participate in their communities by addressing identified needs and serving without expecting compensation (e.g., money or treats)	List and describe needs in their community	Plan to address identified needs in their community without expecting compensation	Address identified needs and serve in their community without expecting compensation	Invite and encourage others to address identified needs through service in their community without expecting compensation

SERVICE

6-8	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to show empathy by selecting informal or identified formal service opportunities where assistance is needed	Develop empathy by identifying informal or formal service opportunities where assistance is needed	Develop empathy by prioritizing identified informal or formal service opportunities where assistance is needed	Show empathy by selecting informal or identified formal service opportunities where assistance is needed	Show empathy by guiding others to select formal or informal service opportunities
Students will be able to play a role in their communities by addressing selected needs and serving without expecting compensation or formal recognition	Identify needs and consider opportunities to serve in their community	Prioritize needs and plan to serve in their community without expecting compensation	Address selected needs and serve in their community without expecting compensation or formal recognition	Collaborate with others to plan and execute service in their community without expecting compensation or recognition

SERVICE

9-12	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to show empathy by seeking and recognizing both informal and formal service opportunities where assistance is needed	Develop empathy by identifying informal and formal service opportunities	Develop empathy by recognizing and prioritizing informal and formal service opportunities where assistance is needed	Show empathy by independently seeking and selecting informal and formal service opportunities where assistance is needed	Show empathy by adapting prior service experience to engage others in new informal and formal service opportunities
Students will be able to engage civically in communities (local and global) by addressing recognized needs and serving without expecting compensation or recognition	Consider and identify opportunities to serve in local and global communities	Recognize and prioritize local and global community needs without expecting compensation	Address recognized needs and serve in local and global communities without expecting compensation or recognition	Organize and lead service in local and global communities without expecting compensation or recognition

SERVICE

Postsecondary	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to show empathy by investigating community needs and collaborating with stakeholders to determine and develop solutions for those needs	Develop empathy by listing possible resources and stakeholders to outline solutions for community needs	Develop empathy by determining best resources and most relevant stakeholders and predicting barriers to developing solutions for community needs	Show empathy by investigating community needs, collaborating with stakeholders and determining and developing solutions for community needs	Show empathy by leading a group to research community needs and determine and develop solutions for an identified project
Lifelong learners will be able to engage civically by reaching out and including community stakeholders in the execution and evaluation of their solution to community needs	List possible solutions to local and global community needs with stakeholders	Plan solutions to local and global community needs with stakeholders	Execute then evaluate solutions for local and global community needs by reaching out and including community stakeholders	Generate and organize, in partnership with stakeholders, a sustainable service protocol for future local and global community needs

RESPECT

Acknowledge differences by looking for the good in everyone, including oneself, and show due regard for feelings, rights, cultures and traditions.

Pre-K	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to show self-respect by using self-regulation and promoting self-advocacy through verbal and nonverbal expressions	Identify aspects of self-respect by selecting appropriate expressions for self-advocacy and self-regulation	Recognize and show self-respect through appropriate expressions for self-advocacy and self-regulation	Show self-respect by using self-regulation and promoting self-advocacy through appropriate expressions	Show self-respect and self-advocacy by establishing and demonstrating self-regulation through appropriate expressions
Students will be able to demonstrate the ability to show respect for their diverse community by recognizing and appreciating similarities and differences between themselves and their peers	From a list, select similarities and differences between themselves and their peers to demonstrate the ability to show respect for their diverse community	Recall and state similarities and differences between themselves and their peers to demonstrate the ability to show respect for their diverse community	Recognize and appreciate similarities and differences between themselves and their peers to demonstrate the ability to show respect for their diverse community	Identify why and how similarities and differences between themselves and their peers influence interpersonal skills to demonstrate the ability to show respect for their diverse community

RESPECT

K-2	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to show self-respect through practicing self-regulation and distinguishing appropriate communication of their needs to self-advocate	Show self-respect by describing self-regulation strategies and appropriately communicating needs through self-advocacy	Show self-respect and self-regulation by differentiating between appropriate types of communication to demonstrate their need to self-advocate	Show self-respect by practicing self-regulation and distinguishing appropriate communication to self-advocate	Explore self-respect by describing the effects of self-regulation together with the key parts of self-advocacy and appropriate communication
Students will be able to demonstrate recognition of and respect for the feelings and ideas of their diverse community members by applying interpersonal skill	Identify the value of interpersonal skills to show respect for the feelings and ideas of their diverse community members	Recognize and describe the importance of interpersonal skills to show respect for the feelings and ideas of their diverse community members	Apply interpersonal skills to show respect for the feelings and ideas of their diverse community members	Infer new generalizations from the application of interpersonal skills to demonstrate recognition of and respect for the feelings and ideas of their diverse community members

RESPECT

3-5	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to show self-respect by understanding and communicating their cultures, traditions, values, privileges and needs to their diverse community members	Show self-respect by recognizing their cultures, traditions, values, privileges and needs to their diverse community members	Show self-respect by describing their cultures, traditions, values, privileges and needs to their diverse community members	Show self-respect by understanding and communicating cultures, traditions, values, privileges and needs to their diverse community members	Show self-respect by discerning and appreciating their cultures, traditions, values, privileges and needs to share with their diverse community members
Students will be able to demonstrate the ability to show respect through collaborating with their diverse community members to understand, recognize and appreciate diverse cultures, traditions, values, privileges, needs and life experiences	Recognize diverse cultures, traditions, values, privileges, needs and life experiences to show respect through collaboration with diverse community members	Recognize and understand diverse cultures, traditions, values, privileges, needs and life experiences to show respect through collaboration with diverse community members	Recognize, understand and appreciate diverse cultures, traditions, values, privileges, needs and life experiences to show respect through collaboration with diverse community members	Recognize, understand, appreciate and promote diverse cultures, traditions, values, privileges, needs and life experiences to show respect through collaboration with diverse community members

RESPECT

6-8	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to model self-respect by understanding and appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Model self-respect by describing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Model self-respect by stating and demonstrating the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Model self-respect by understanding and appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Model self-respect by defending a position for appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy
Students will be able to model respect by utilizing supported adaptive strategies and interpersonal skills to recognize, understand, support and protect the rights associated with each member of their diverse community	Recognize the rights associated with each member of their diverse community by modeling respect and utilizing supported adaptive strategies and interpersonal skills	Recognize and understand the rights associated with each member of their diverse community through modeling respect by utilizing supported adaptive strategies and interpersonal skills	Recognize, understand, support and protect the rights associated with each member of their diverse community through modeling respect by utilizing supported adaptive strategies and interpersonal skills	Explain the need to support and protect the rights associated with each member of their diverse community through modeling respect by utilizing supported adaptive strategies and interpersonal skills

RESPECT

9-12	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to apply self-respect through establishing and expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Apply self-respect by identifying the unique values, privileges and needs associated with the student's own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Apply self-respect by identifying and establishing the unique values, privileges and needs associated with the student's own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Apply self-respect by establishing and expressing the unique values, privileges and needs associated with the student's own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Apply self-respect by expressing and explaining the unique values, privileges and needs associated with the student's own cultural, racial, political and interpersonal groups to advance personal well-being and self-advocacy
Students will be able to generate and utilize adaptive strategies, independently, for recognizing, understanding, supporting and advocating for the rights and the unique values, contributions and needs associated with each member of their diverse community	Recognize the rights and the unique values, contributions and needs associated with each member of their diverse community by generating and utilizing adaptive strategies, independently	Recognize and understand the unique values, contributions and needs associated with each member of their diverse community by generating and utilizing adaptive strategies, independently	Recognize, understand, support and advocate for the rights and the unique values, contributions and needs associated with each member of their diverse community by generating and utilizing adaptive strategies independently	Defend a position for the rights and the unique values, contributions and needs associated with each member of their diverse community, generating and utilizing adaptive strategies independently

RESPECT

Postsecondary	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to generalize self-respect by establishing and appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being, self-advocacy and contribution to their diverse community	Generate self-respect by exploring and appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to exercise personal well-being, self-advocacy and contribution to their diverse community	Generate self-respect by researching and appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being, self-advocacy and contribution to their diverse community	Generalize self-respect by establishing and appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to advance personal well-being, self-advocacy and contribution to their diverse community	Advance self-respect by appropriately expressing and thinking through the implications surrounding the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to solidify personal well-being, self-advocacy and contribution to their diverse community
Lifelong learners will be able to generate and utilize adaptive strategies and advocacy, independently, for recognizing and understanding the rights associated with all community members to contribute to the global community	Develop theories to recognize the rights associated with all community members in order to contribute to the global community by generating and utilizing adaptive strategies and advocacy independently	Experiment on the theories to recognize and understand the rights associated with all community members in order to contribute to the global community by generating and utilizing adaptive strategies and advocacy independently	Demonstrate the recognition and understanding of the rights associated with all community members in order to contribute to the global community by generating and utilizing adaptive strategies and advocacy independently	Defend a position for the recognition and understanding of the rights associated with all community members in order to contribute to the global community by generating and utilizing adaptive strategies and advocacy independently

UTAH PORTRAIT OF A GRADUATE
COMPETENCY MODEL RUBRICS

MAP by Grade Level

PRE-K MASTERY

Mastery is the ability to demonstrate depth of knowledge and skill proficiency.

Academic Mastery	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to recognize, recall and sort academic content knowledge and foundational skills	Imitate foundational knowledge and skills Select foundational knowledge and skills from a group of choices Show foundational knowledge and skills	Attempt foundational knowledge and skills Identify foundational knowledge and skills found in a group Use models to show foundational academic knowledge and skills	Recognize foundational knowledge and skills Recall foundational knowledge and skills Sort foundational knowledge and skills	List foundational knowledge and skills Use foundational knowledge and skills Organize foundational academic knowledge and skills
Students will be able to use information to arrive at a conclusion or solution	Recognize a decision or choice from a list	Name information to make a conclusion or solution	Use information to arrive at a conclusion or solution	Describe information used to arrive at a conclusion or solution

PRE-K MASTERY

Wellness		Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to identify emotions, recognize physical and social needs, ask for help and participate in guided wellness activities	**Physical**	Determine what physical needs are Observe activities that meet physical needs	Identify what personal physical needs are and when to ask for help Discuss activities that fit personal physical needs	Recognize physical needs and when to ask for help Participate in guided activities that meet physical needs	Select physical activities to meet needs Engage with a variety of physical activities
	Mental	Discuss what emotions are	Participate in lessons or activities that help recognize emotions	Identify a range of emotions Ask for help when support is needed	Describe connections between physical, social-emotional health and mental well-being Understand how mental health impacts behaviors
	Social-Emotional	Determine what social needs are	Discuss social activities and the importance of relationships	Participate in social activities that support relationship building	Select social activities that support building relationships with others Invite others to participate in social activities

PRE-K MASTERY

Civic, Financial and Economic Literacy	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to interact cooperatively with adults and peers of diverse backgrounds and will contribute to the classroom community	Identify classroom rules for how to cooperate with others Determine from a list appropriate examples of how one could contribute to their classroom community	Explain classroom rules for how to cooperate with others from diverse backgrounds Describe ways to contribute to the classroom community	Cooperate with others from diverse backgrounds by sharing, taking turns with a partner and problem solving Contribute to the classroom community by fulfilling jobs, recognizing needs and participating in group activities	Cooperate with others from diverse backgrounds by sharing, taking turns with a large group and planning conflict resolution with peers Defend their perspective to peers about the importance of contributing to the classroom community Establish ideas for contributions that meet the needs of the classroom community
Students will be able to distinguish between a want and a need and will explain how jobs meet the needs of individuals in the classroom community	Recall basic needs and wants Match from a list different jobs to the individual needs they meet	Classify basic needs and wants Recognize that different jobs meet different needs within the community	Compare and contrast needs and wants Explain how people have jobs that meet diverse needs of individuals and their communities	"Design a list of individual needs and wants and evaluate why each is in its appropriate category Infer what jobs would meet needs for individuals and communities Develop different examples of jobs for individuals and communities

PRE-K MASTERY

Digital Literacy	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to identify various digital devices and understand basic terminology	Identify digital versus non-digital devices from options	Recognize there are different types of devices	Name various digital devices with correct terminology	Describe different purposes for digital devices with correct terminology
With support, students will be able to use digital technology properly to learn and communicate with others	Attempt to use technology to learn and communicate with full support	Attempt to use technology appropriately to learn and communicate with moderate support	Use technology appropriately to learn and communicate with others with some support	Use technology appropriately to learn and communicate under supervision

PRE-K AUTONOMY

Autonomy is having the self-confidence and motivation to think and act independently.

Communication	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to convey information through expression of words, sentences, pictures and gestures for different purposes	Recognize information	Label and describe information	Deliver information through expression of words, sentences, pictures and gestures for different purposes	Use knowledge of different communication forms to select appropriate form for different purposes and audiences
Students will be able to process information and respond verbally and/or nonverbally in an appropriate manner	Recognize information communicated verbally and/or nonverbally	Determine factual accuracy of information communicated verbally and nonverbally	Process information and respond verbally and/or nonverbally in an appropriate manner	Demonstrate understanding of information by adapting responses to an audience

Critical Thinking and Problem Solving	Emerging Competence	Approaching Competence	Competent	Extending Competence
With support, students will be able to identify, categorize and sequence information to make choices based on new learning and real-life experiences	Recognize that action is needed to solve a problem	Seek appropriate support people and state the problem in a constructive way	Demonstrate, with support, appropriate action to solve the problem	Complete the action independently

PRE-K AUTONOMY

Creativity and Innovation	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to use their imaginations in creative play	Imitate real-life actions appropriately with adult support Recognize others' play actions	Imitate and adapt real-life play, with minimal support Demonstrate increasingly positive interactions with others during play	Understand and engage in appropriate play using real-life and imaginary scenarios Participate in a variety of play scenarios alongside others	Initiate real-life and imaginary play scenarios with others Adjust interactions to accommodate others' feelings in a variety of creative play

Collaboration and Teamwork	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to engage in cooperative play and transition between activities and settings	Recognize whether an activity is solo or cooperative Identify the beginning and ending of an activity State which activities are done in various settings	Participate in solo and cooperative activities Interact with others during activities Model expected behaviors when transitioning between activities and settings	Engage in cooperative play by interacting with other people Differentiate behaviors for various activities and settings Perform expected behaviors consistently when transitioning between activities	Initiate and engage in cooperative play with others Adapt to unfamiliar activities and settings by using past knowledge Identify transitions between new or unfamiliar activities by using past knowledge
Students will be able to adapt to situations and make decisions while interacting with others	Identify similarities and differences for many types of people interacted with on a daily basis Identify the different types of relationships between self and others	Evaluate different types of interactions with others, including positive/ negative, formal/informal, small/large group, etc Select appropriate behavior based upon different interactions with others	Establish guidelines to identify obstacles when interacting with others Plan solutions to overcome obstacles when interacting with others	Recognize opportunities to generate ideas for how to work with others in new situations Try ideas for interacting with others in new situations

PRE-K PURPOSE

Purpose guides life decisions, influences behavior, shapes goals, offers a sense of direction, and creates meaning.

Honesty, Integrity and Responsibility	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to know the difference between a truth and a lie, while practicing truthfulness	Recognize, with guidance, when something is the truth	Describe what it means to tell the truth	Compare the difference between a truth and a lie while practicing truthfulness	Explain why telling truth is important
Students will be able to begin work and follow directions	Understand where to start work Listen to directions	Begin work with guidance Follow directions with guidance	Begin work independently Follow directions	Complete work independently Be an example in following directions

Hard Work and Resilience	Emerging Competence	Approaching Competence	Competent	Extending Competence
With support, students will be able to achieve adult-provided goals	State the actions toward achieving a given goal, with support	Take steps toward achieving a given goal	Complete a given goal, with support	Select the next goal from a list of given goals
Students will be able to develop maintained focus, with support, on tasks requiring more than one attempt and understand that choices matter and have consequences	Identify the purpose of focus Match choices with possible consequences or outcomes	Describe, with support, how focus helps to complete a task and practice attempting a repeated task State examples from their own experience of choices and possible consequences or outcomes	Develop persistence while attempting a repeated task, with support Describe the effects or outcomes of a choice	Demonstrate flexibility and focus while attempting a repeated task with minimum support Explain the relationship between consequences and choices

PRE-K PURPOSE

Lifelong Learning and Personal Growth	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to explore their environments and engage in learning opportunities	Explore familiar environments through guided opportunities for discovery	Explore familiar environments by interacting with other learners during opportunities to develop discovery	Explore familiar and unfamiliar environments by interacting independently during opportunities to display discovery	Explore additional unfamiliar environments by expressing motivation for learning and interacting with other learners during opportunities for discovery

Service	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to, with prompting and support, show kindness through their words and actions as they help and serve in their home and classroom	Recognize examples of kind words and actions with prompting and support Recognize examples of helping and serving in their home and classroom with prompting and support	Plan to show kindness by using words and actions with prompting and support Plan to help and serve in their home and classroom with prompting and support	Show kindness through their words and actions with prompting and support Help and serve in their home and classroom with prompting and support	Encourage others to show kindness through words and actions with prompting and support Invite and encourage others to help and serve in their home and classroom with prompting and support

PRE-K PURPOSE

Respect	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to show self-respect by using self-regulation and promoting self-advocacy through verbal and nonverbal expressions	Identify aspects of self-respect by selecting appropriate expressions for self-advocacy and self-regulation	Recognize and show self-respect through appropriate expressions for self-advocacy and self-regulation	Show self-respect by using self-regulation and promoting self-advocacy through appropriate expressions	Show self-respect and self-advocacy by establishing and demonstrating self-regulation through appropriate expressions
Students will be able to demonstrate the ability to show respect for their diverse community by recognizing and appreciating similarities and differences between themselves and their peers	From a list, select similarities and differences between themselves and their peers to demonstrate the ability to show respect for their diverse community	Recall and state similarities and differences between themselves and their peers to demonstrate the ability to show respect for their diverse community	Recognize and appreciate similarities and differences between themselves and their peers to demonstrate the ability to show respect for their diverse community	Identify why and how similarities and differences between themselves and their peers influence interpersonal skills to demonstrate the ability to show respect for their diverse community

GRADES K-2 MASTERY

Mastery is the ability to demonstrate depth of knowledge and skill proficiency.

Academic Mastery	Emerging Competence	Approaching Competence	Competent	Extending Competence
With support, students will be able to retrieve, comprehend and analyze academic content knowledge and skills	Label academic knowledge and skills Show academic knowledge and skills Discern between important and less-important knowledge and skills	State knowledge and skills Describe knowledge and skills Sort specific content knowledge and skills	Recall knowledge and skills Paraphrase knowledge and skills Classify specific content knowledge and skills	Demonstrate knowledge and skills Model academic knowledge and skills Infer ideas based on content knowledge and skills
Students will be able to make observations and use information to prepare for an evidence-based conclusion or solution	Recognize information from a list based on observations to prepare for an evidence-based conclusion or solution Label information to prepare for an evidence-based conclusion or solution	List information from observation to prepare for an evidence-based conclusion or solution State information to prepare for an evidence-based conclusion or solution	Discern information through observations to prepare for an evidence-based conclusion or solution Use information to prepare for an evidence-based conclusion or solution	Categorize information through observations to prepare for an evidence-based conclusion or solution Describe information to prepare for an evidence-based conclusion or solution

K-2 MASTERY

Wellness		Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to explore self-awareness, participate in wellness activities and develop self-advocacy skills to express physical and social-emotional needs appropriately with trusted adults	**Physical**	List physical needs Recognize the benefits of physical activity	Match physical needs with resources and activities Name trusted adults to express physical needs with	Participate in a wide variety of physical activities to determine interests and strengths Identify physical needs and communicate them with trusted adults	Select physical activities based on interests and strengths Understand how physical health impacts engagement in other activities
	Mental	Identify personal emotions Discuss a variety of coping skills	Notice personal emotions and reactions Recognize when to use coping skills Name the trusted adults that feelings can be shared with	Understand the effects of different emotions and reactions Use coping skills, including speaking with a trusted adult, to respond to emotions	Describe connections between physical, social-emotional health and mental well-being Identify the causes of emotions and express them to a trusted adult
	Social-Emotional	Recognize the benefits of relationships	Describe various types of relationships	Develop relationships that strengthen social-emotional well-being	Initiate social activities that support relationship-building

K-2 MASTERY

Civic, Financial and Economic Literacy	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to identify the structure of and roles within a diverse community and will explain how their individual role contributes to the community	Define a community Recognize personal strengths	Compare and contrast the structures of and roles within a diverse community Describe how each participant in a community has a determinant role and how to contribute to the community	Identify the structure of and roles within a diverse community Explain and discuss how individuals' personal strengths contribute to the community	Explain the importance of a classroom community and begin to participate in democratic processes within that community Establish a list of individual roles that would contribute to the classroom community based on personal strengths and enact those roles
Students will be able to identify and assign value to personal assets according to individual wants and needs	Differentiate between a need and a want Select from a list which needs and wants would be the most useful for an individual or community	Identify personal assets according to individual needs and wants Compare and contrast the relative value of individual needs and wants	Evaluate the value of personal strengths based on individual needs and wants	Evaluate peers' lists of strengths in comparison with their own Infer which personal assets would be most valuable and least valuable in a variety of real-world situations

K-2 MASTERY

Digital Literacy	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to operate digital devices safely in social and academic settings and understand the appropriate disclosure of personal information	Recognize rules for operating digital devices safely Recognize the concept of personal information	Use rules for operating digital devices safely Identify personal information	Demonstrate rules for operating digital devices safely Identify personal information and know not to share it without supervision	Explain how to operate a digital device safely Discern when and where disclosure of personal information is appropriate with supervision
Students will be able to use digital tools to find information and identify types of sources, develop creative ideas and demonstrate basic technology skills to accomplish educational goals	Use, with support, digital tools to find information Show creativity in a digital setting while learning	Use digital tools to find information and identify types of sources with minimal support Demonstrate creativity while working toward an educational goal	Use digital tools and demonstrate basic technology skills to find information and identify types of sources Develop creative ideas to accomplish an educational goal	Use digital tools and demonstrate technology skills consistently to find information and identify types of sources Generate a variety of creative ideas to complete educational goals

K-2 AUTONOMY

Autonomy is having the self-confidence and motivation to think and act independently.

Communication	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to recognize that the way things are expressed or written affects others	Identify that pictures and written and/or verbal words have meaning	Recognize, with support, how things expressed or written affect others	Recognize and determine that the way things are expressed or written affects others	Describe how expressed ideas affect others and the way others' ideas may affect them
Students will be able to describe and analyze information from others' verbal and/or nonverbal communications, responding appropriately in most settings	Describe others' verbal and/or nonverbal communications, with support	Describe others' verbal and/or nonverbal communications and respond appropriately in familiar settings	Describe and explain information from others' verbal and/or nonverbal communications, responding appropriately in most settings	Describe and explain the reason for others' verbal and/or nonverbal communications, responding appropriately in both familiar and unfamiliar settings

Critical Thinking and Problem Solving	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to find key information, make inferences and form generalizations	Search for and collect information	Separate relevant from non-relevant information	Utilize the relevant information to make inferences and form generalizations	Compare your generalizations with those of others
Students will be able to explain reasons for making a decision based on new learning and real-life experiences	Demonstrate use of previously-known information	Combine newly-learned information with previously-known information to reach a decision	Describe how or why the decision was made	Compare and contrast individual decisions with the decisions of others

K-2 AUTONOMY

Creativity and Innovation	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to use their imaginations, creatively explore new ideas and make original creations	Show interest in exploring new ideas with adult support Reproduce a model with new approaches or materials	Use ideas in new ways in a familiar or teacher-directed activities Categorize existing materials and reject less successful choices to make a product, process or solution	Explore a new idea or question using their imagination Create a product, process, or solution using their imagination	Evaluate creative process and product using a set criteria Extend a new idea to create a product, process or solution through cooperatively integrating others' ideas and perspectives

Collaboration and Teamwork	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to follow group norms while working, playing and completing tasks and projects with peers	Identify on-task and off-task group behavior while working and playing Recognize the procedures to participate in projects alone and with a group	Display expected behavior while working and playing with limited teacher prompting Participate in projects individually and with groups while following procedures with limited prompting	Follow expected group behavior while working and playing Complete projects individually and in groups while following procedures without prompting	Model expected group behavior in different situations when working and playing Demonstrate expected behavior while transitioning into other assignments and projects
Students will be able to promote individual and shared outcomes while engaging in mutual feedback	Recognize the difference between individual and group needs Identify and label how you react to the positive and challenging behaviors of others	Practice meeting both individual and group needs Acknowledge how others react to your behavior in both positive and challenging ways and adjust behaviors to contribute to the team	Promote individual and group needs in a collaborative way Engage in mutual feedback by recognizing how group members' behaviors impact others while meeting the needs of the group	Cooperate in different group settings Evaluate and critique the impact of feedback both individually and in a group

K-2 PURPOSE

Purpose guides life decisions, influences behavior, shapes goals, offers a sense of direction, and creates meaning.

Honesty, Integrity and Responsibility	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to make sense of a situation by recalling what did and did not happen and express their emotions appropriately	Observe what happens in a situation Recognize emotions	Recognize what happens in a situation Identify personal emotions and those of others	Make sense of a situation by recalling what did and did not happen Express emotions appropriately	Analyze a situation from a different viewpoint Support others to express emotions appropriately
Students will be able to take ownership for their actions and complete tasks	Recognize with guidance how actions affect others Begin work with guidance on assigned tasks	Recognize how actions affect others Work on assigned tasks	Take ownership for personal actions Complete tasks	Predict how personal actions could affect others Help others complete tasks

K-2 PURPOSE

Hard Work and Resilience	Emerging Competence	Approaching Competence	Competent	Extending Competence
With support, students will be able to set short-term personal and educational goals	Recognize the basic definition/idea of a goal	Identify and sort a generalized list of personal goals and educational goals	Name a current personal and educational goal, developed with adult support	Describe who, what, when and where of a current personal and educational goal, established with adult support
Students will be able to have age-appropriate, consistent educational interests while beginning to develop awareness and control of themselves and their social environments	List educational subjects or topics Identify ways to show self-control	Rank educational subjects or topics in order of preference Practice, with support, showing self-control with others	Describe an educational subject or topic that is interesting to the individual student Demonstrate self-control with others	Describe and provide reasons why an educational subject or topic is interesting to the individual student Recognize and explain a situation where a student displayed self-control with others

Lifelong Learning and Personal Growth	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to understand the purpose of personal improvement through goal-setting to increase knowledge, build decision-making skills and develop values across settings	Express awareness of self-improvement through identifying goals, increasing knowledge, practicing decision-making skills and exploring personal values across familiar environments	Express interest for self-improvement through guided goal setting, increasing knowledge, understanding decision-making skills and exploring personal values across familiar environments	Express the benefit for self-improvement through goal setting, increasing knowledge, improving decision-making skills and establishing personal values across familiar and unfamiliar environments	Apply self-improvement strategies through targeted goal setting, increasing knowledge, strengthening decision-making skills and establishing and reflecting on personal values across familiar and unfamiliar environments

K-2 PURPOSE

Service	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to proactively show kindness through their words and actions as they help and serve in their school and local community	Identify kind words and actions Identify examples of helping and serving in their school and local community	Plan to show kindness through words and actions Plan to help and serve in their school and local community	Choose to show kindness through words and actions Choose to help and serve in their school and local community	Encourage others to show kindness through words and actions Invite and encourage others to help and serve in their school and local community

Respect	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to show self-respect through practicing self-regulation and distinguishing appropriate communication of their needs to self-advocate	Show self-respect by describing self-regulation strategies and appropriately communicating needs through self-advocacy	Show self-respect and self-regulation by differentiating between appropriate types of communication to demonstrate their need to self-advocate	Show self-respect by practicing self-regulation and distinguishing appropriate communication to self-advocate	Explore self-respect by describing the effects of self-regulation together with the key parts of self-advocacy and appropriate communication
Students will be able to demonstrate recognition of and respect for the feelings and ideas of their diverse community members by applying interpersonal skill	Identify the value of interpersonal skills to show respect for the feelings and ideas of their diverse community members	Recognize and describe the importance of interpersonal skills to show respect for the feelings and ideas of their diverse community members	Apply interpersonal skills to show respect for the feelings and ideas of their diverse community members	Infer new generalizations from the application of interpersonal skills to demonstrate recognition of and respect for the feelings and ideas of their diverse community members

GRADES 3-5 MASTERY

Mastery is the ability to demonstrate depth of knowledge and skill proficiency.

Academic Mastery	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to comprehend and infer to analyze academic content knowledge and skills across multiple disciplines	Recall academic knowledge and skills across multiple disciplines Summarize ideas from knowledge and skills across multiple disciplines	Demonstrate academic knowledge and skills across multiple disciplines Compare and contrast ideas from knowledge and skills across multiple disciplines	Describe academic knowledge and skills across multiple disciplines Infer new ideas from knowledge and skills across multiple disciplines	Organize academic knowledge and skills across multiple disciplines Predict new ideas from knowledge and skills across multiple disciplines
Students will be able to organize and select information to reach an evidence-based conclusion or solution	Summarize information to reach an evidence-based conclusion or solution Identify information from a list that could support an evidence-based conclusion or solution Model an evidence-based conclusion or solution	Compare and contrast information to reach an evidence-based conclusion or solution Select information from a list to support an evidence-based conclusion or solution Construct an evidence-based conclusion or solution	Organize information to reach an evidence-based conclusion or solution Select information to support an evidence-based conclusion or solution Establish an evidence-based conclusion or solution	Evaluate information to reach an evidence-based conclusion or solution Use information to support an evidence-based conclusion or solution Defend conclusions or solutions through use of evidence

3-5 MASTERY

Wellness		Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to develop self-awareness, participate in wellness routines and practice self-advocacy skills by asking for help with mental, physical and social-emotional needs from trusted relationships	**Physical**	Define personal physical health and wellness routines Compare healthy and unhealthy routines and who to turn to discuss physical needs	Identify how physical health can be developed through wellness routines Self-advocate for physical needs by asking for help from a trusted adult	Develop physical health through participation in wellness routines Practice self-advocacy by asking for help with physical needs from a trusted adult	Modify wellness routines to improve physical health Determine which trusted relationships are most applicable to help with personal physical needs
	Mental	Define positive and negative stress and how each feels Compare healthy and unhealthy ways to cope with emotions and minimize stress	Recognize healthy and unhealthy routines for coping with stress and uncomfortable emotions Explore a variety of healthy stress management routines and coping techniques, including self-advocacy to a trusted adult	Practice healthy stress management routines Ask for help from a trusted adult when struggling to cope with stress or other uncomfortable emotions	Reflect on the connections between physical, social-emotional and mental health Understand how to address mental health when it impacts engagement with others and activities
	Social-Emotional	Identify the characteristics of trusted relationships Explore social-emotional needs and routines	Compare a trusted relationship and a non-trusted relationship Identify supports for social-emotional needs Connect a social-emotional routine to needs	Develop trusted relationships Ask for help with social-emotional needs Incorporate social-emotional routines	Reflect on trusted relationships and explore relationship boundary-setting Utilize help and continue asking for help around social-emotional needs Maintain social-emotional routines consistently

3-5 MASTERY

Civic, Financial and Economic Literacy	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to develop societal awareness at the local, state and national level by expanding participation in diverse civic activities	Identify societal systems at local, state and national level Recognize civic engagement opportunities	Describe societal systems at local, state or national levels Explore ways to personally participate in diverse civic activities	Investigate and explain the relationship between the individual and societal systems at the local, state and national level Analyze opportunities and participate in diverse civic activities at the local, state or national level	Take a position on the impact of the individual and societal systems at the local, state or national level Reflect on their role in acting and participating in civic activities
Students will be able to justify wants and needs by evaluating the relationship between earning, saving and spending	Differentiate between needs and wants, as well as earning, saving and spending	Determine whether an asset is a need or a want by drawing connections between earning, saving and spending	Justify wants and needs by evaluating the relationship between earning, saving and spending	Critique the pressures that promote wants as needs Evaluate opportunities that come from budgeting, saving, earning and spending

3-5 MASTERY

Digital Literacy	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to describe and model digital safety practices and respect the rights of others in social and academic settings	Recognize digital safety practices Identify ways to respect the rights of others in social and academic settings	Explain digital safety practices Demonstrate, with support, how to respect the rights of others in social and academic settings	Depict and model digital safety practices Describe and model how actions online can impact others and themselves in social and academic settings	Compare and contrast digital safety practices Adapt to changing social and academic settings while respecting the rights of others
Students will be able to identify credible digital sources, operate technology to organize and present information, create evidence of learning and communicate and collaborate to meet the needs of their audience	Choose the credible teacher-provided source with scaffolding Find information to present using technology Recognize appropriate communication and collaboration	Distinguish credibility between teacher-provided sources Collect information to demonstrate evidence of learning using technology Demonstrate appropriate communication and collaboration	Identify credible digital sources Organize and present information to show evidence of learning using technology Communicate and collaborate to meet the needs of a target audience	Discriminate the credibility of various digital sources Justify learning using technology to organize and present information Adapt appropriate communication and collaboration to meet the needs of a variety of audiences

3-5 AUTONOMY

Autonomy is having the self-confidence and motivation to think and act independently.

Communication	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to differentiate and share specific information appropriate to the environment and/or audience	Describe the difference between general and specific communication Experiment with different types of communication methods (written, oral, digital, picture symbols, etc.) to learn features of them	Decide what kind of information should and should not be shared with audience Identify the benefits of different communication methods	Distinguish the needs of the audience and/or environment to present information Determine the correct method of communication for the audience/environment	Adjust the delivery and method of communication as the needs of the audience fluctuate Demonstrate awareness when engaging with people from other cultures
Students will be able to integrate meaning from other's verbal and/or nonverbal communication by responding purposefully within a given context	Identify the meanings of others' communication and respond	Evaluate meaning from others' verbal and/or nonverbal communication and respond purposefully	Integrate meaning from others' verbal and/or nonverbal communication by responding purposefully within a given context	Generate and explain meaning from others' verbal and/or nonverbal communication and respond purposefully within a given context

3-5 AUTONOMY

Critical Thinking and Problem Solving	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to evaluate the relevance and importance of key information presented from a variety of reliable sources to justify solutions and claims	Find information from provided sources List useful ideas Generate a partial solution	Select important information from provided sources Choose ideas from one source Generate a solution	Prioritize the importance of information Combine ideas from two reliable resources Generate a solution	Prioritize the relevance and importance of key information Combine ideas from three or more reliable resources Generate two or more solutions
Students will be able to consider multiple sides of an issue, seek alternative solutions and make decisions based on new learning	Identify more than one side of an issue Generate steps towards a solution	Describe more than one side of an issue Organize ideas to find a solution using prior knowledge or learned information	Organize multiple ideas and perspectives of an issue Utilize new and learned information to make decisions and find multiple solutions	Evaluate multiple perspectives of an issue to justify solutions Make decisions based on new learning

3-5 AUTONOMY

Creativity and Innovation	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to identify a need and brainstorm ideas within a group to design unique solutions and artistic expressions	Participate in discussions to identify needs or ideas Explore product, process or solution and considers novel approaches independently or collaboratively Recognize and contributes individual interests and strengths to design and develop an artistic expression or a solution	Identify a need or idea independently or collaboratively Recognize that there are different perspectives when identifying needs and ideas for designing a product, process or solution Recognize individual strengths, artistic expression and potential contributions to the project independently	Integrate others' ideas and perspectives to collaboratively identify a need or unique idea Integrate others' ideas and perspectives to collaboratively design a product, process or solution Contribute individual interests and strengths to design and develop a unique artistic expression or a solution	Initiate and seek input and information from a variety of sources to identify a need or unique idea Predict consequences of varying approaches while investigating a product, process or solution Evaluate results and adjust the design process for varying artistic expressions or solutions

3-5 AUTONOMY

Collaboration and Teamwork	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to contribute to the development of group norms, build on the ideas of others and encourage equitable participation when working in a collaborative group	Participate in established group expectations Add own ideas to group activities Listen to the contributions of others in a group	Evaluate group expectations Revise individual ideas to align with group expectations and activities Participate in the group while collaborating with others	Contribute to the development of group expectations Build on the ideas of others when working within a group Encourage equitable participation when working in a collaborative group	Develop a strategy to ensure equitable collaboration when establishing group expectations Expand upon and adapt personal contribution to generate new ideas for the group Recognize and resolve obstacles to ensure equitable participation within the collaborative group
Students will be able to take on a given role, encourage others to complete necessary goals and apply problem-solving practices for high-level outcomes	Explore different roles within a group and recognize the functions of each role Discuss possible solutions to problems that may arise when working with others	Understand various roles within a group and take on a given role to reach group goals Practice probable solutions to specific challenges that arise while working collaboratively with others	Determine individual roles while encouraging each other to complete group goals Utilize problem-solving practices to achieve positive outcomes while working collaboratively with others	Recognize obstacles and adapt group roles and strategies to overcome obstacles and achieve group goals Investigate problem-solving practices and solutions to determine the best course of action for achieving successful outcomes while working with others

3-5 PURPOSE

Purpose guides life decisions, influences behavior, shapes goals, offers a sense of direction, and creates meaning.

Honesty, Integrity and Responsibility	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to assess a situation, apply empathy and articulate how their choices have positive and negative outcomes	Describe a situation Understand empathy Explain the impact of a choice	Summarize key details of a situation Recognize how to use empathy Describe possible outcomes of choices	Assess a situation Apply empathy Articulate how choices have positive and negative outcomes	Predict appropriate ways to respond to a situation Investigate ways to show empathy Reflect on choices and determine ways to avoid negative outcomes
Students will be able to identify the action steps needed to complete commitments, meet responsibilities and contribute productively to a group	Recognize beginning steps needed to complete commitments Describe responsibilities Recognize the various roles in the group	Follow suggested action steps needed to complete commitments Work to fulfill responsibilities Practice assigned role with guidance	Identify and create action steps needed to complete commitments Meet responsibilities Contribute productively to a group	Evaluate and adjust action steps throughout the process to complete commitments Exceed responsibilities and expectations by helping others Reflect on contribution to the group and adjust as needed

3-5 PURPOSE

Hard Work and Resilience	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to set and achieve short and long-term educational and personal goals, with prompting	Identify personal and educational goals, with prompting	Describe short- and long-term educational and personal goals, with prompting	Make and complete short- and long-term educational and personal goals, with prompting	Develop and complete short- and long-term educational and personal goals and reflect on the outcomes
Students will be able to understand that the learning process is increasingly challenging, requiring consistent interest and persistent effort through developing self-control and intrinsic motivation	Recognize that the learning process becomes increasingly challenging and will require consistent interest and persistent effort Identify what self-control and intrinsic motivation look like	Describe how the learning process is increasingly challenging while explaining how consistent interest and persistent effort leads to success State how self-control and intrinsic motivation lead to success	Describe how the learning process is increasingly challenging and represent how consistent interest and persistent effort leads to success Demonstrate self-control and intrinsic motivation to complete tasks	Differentiate between simpler and more challenging tasks while recognizing that consistent interest and persistent effort can be called productive struggle Model self-control and intrinsic motivation to ensure tasks are done on time and successfully

Lifelong Learning and Personal Growth	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to experience personal growth through self-direction and goal-setting to apply knowledge, skills and values to inform ideas and actions across settings	Experience personal growth by recognizing available opportunities and applying goals, knowledge, skills and values to establish ideas and behaviors across familiar settings	Experience personal growth by choosing to participate in available opportunities and applying goals, knowledge, skills and values to inform ideas and behaviors across a variety of familiar settings	Experience personal growth by sharing reasons for participating in available opportunities and applying goals, knowledge, skills and values to inform ideas and behavior across familiar and unfamiliar settings	Experience personal growth by adjusting decisions to participate in available opportunities and predict the application of goals, knowledge, skills and values to direct ideas and behaviors across familiar and unfamiliar settings

3-5 PURPOSE

Service	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to proactively show compassion by identifying, with support, informal service opportunities where assistance is needed	Develop compassion by describing, with support, informal service opportunities where assistance is needed	Develop compassion by providing examples, with support, of informal service opportunities where assistance is needed	Choose to show compassion by identifying, with support, informal service opportunities where assistance is needed	Choose to show compassion by selecting informal service opportunities where assistance is needed
Students will be able to participate in their communities by addressing identified needs and serving without expecting compensation (e.g., money or treats)	List and describe needs in their community	Plan to address identified needs in their community without expecting compensation	Address identified needs and serve in their community without expecting compensation	Invite and encourage others to address identified needs through service in their community without expecting compensation

Respect	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to show self-respect by understanding and communicating their cultures, traditions, values, privileges and needs to their diverse community members	Show self-respect by recognizing their cultures, traditions, values, privileges and needs to their diverse community members	Show self-respect by describing their cultures, traditions, values, privileges and needs to their diverse community members	Show self-respect by understanding and communicating cultures, traditions, values, privileges and needs to their diverse community members	Show self-respect by discerning and appreciating their cultures, traditions, values, privileges and needs to share with their diverse community members
Students will be able to demonstrate the ability to show respect through collaborating with their diverse community members to understand, recognize and appreciate diverse cultures, traditions, values, privileges, needs and life experiences	Recognize diverse cultures, traditions, values, privileges, needs and life experiences to show respect through collaboration with diverse community members	Recognize and understand diverse cultures, traditions, values, privileges, needs and life experiences to show respect through collaboration with diverse community members	Recognize, understand and appreciate diverse cultures, traditions, values, privileges, needs and life experiences to show respect through collaboration with diverse community members	Recognize, understand, appreciate and promote diverse cultures, traditions, values, privileges, needs and life experiences to show respect through collaboration with diverse community members

GRADES 6-8 MASTERY

Mastery is the ability to demonstrate depth of knowledge and skill proficiency.

Academic Mastery	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to analyze, adapt and apply academic content knowledge, skills and dispositions across multiple disciplines in teacher-driven contexts	Represent academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Describe relationships between familiar and new academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Identify potential uses for academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts	Organize academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Compare and contrast relationships between familiar and new academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Differentiate appropriate uses for academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts	Analyze academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Adapt familiar academic content knowledge, skills and dispositions to accommodate new learning across multiple disciplines within teacher-driven contexts Apply academic content knowledge,skills and dispositions across multiple disciplines within teacher-driven contexts	Establish conclusions and elaborate upon implications of acquired academic content, knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Think through the implications of relationships between academic content knowledge, skills and dispositions across multiple disciplines within teacher-driven contexts Generate uses for academic content knowledge,skills and dispositions across multiple disciplines within teacher-driven contexts
Students will be able to evaluate, organize and differentiate information to reach an evidence-based conclusion or solution	Sort, diagram and describe information to be used to arrive at an evidence-based conclusion or solution Identify a conclusion or solution based on evidence	Classify, categorize and discern information to be used to arrive at an evidence-based conclusion or solution Infer a conclusion or solution based on evidence	Evaluate, organize and differentiate information to be used to arrive at evidence-based conclusions or solutions Argue for a conclusion or solution based on evidence	Judge, critique and organize information to be used to arrive at evidence-based conclusions or solutions Defend a conclusion or solution based on evidence

6-8 MASTERY

Wellness		Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to practice self-awareness and self-advocacy, set goals and build routines towards balance through mental, physical and social-emotional wellness	**Physical**	Identify physical health needs Explore accessible resources to help support physical health	Prioritize physical health needs Explore different support avenues to advocate for physical health Review a variety of example goals for physical health	Set goals and build routines to meet physical health needs and work towards balance Practice identifying obstacles to learn how to overcome them and achieve goals Advocate appropriately for the supports needed to meet physical goals	Evaluate physical health accomplishments when goal-setting and reflect on the balance between mental and social-emotional health
	Mental	Define mental health needs Explore accessible mental health resources and supports	Prioritize mental health needs and potential goals and routines Identify available resources that are most applicable to support personal needs Explore different ways to advocate for mental health supports needed	Set goals and build routines to address mental health needs Identify obstacles and how to overcome them to achieve those goals Advocate appropriately for the supports needed to meet mental health goals	Evaluate mental health accomplishments when goal-setting and reflect on the balance between physical and social-emotional health
	Social-Emotional	Identify characteristics of positive, healthy relationships Discuss social-emotional wellness routines and goals	Understand social-emotional balance and identify positive, healthy relationships Begin to practice social-emotional wellness routines and goals	Establish positive, healthy relationships Implement social-emotional wellness routines and goals	Foster positive, healthy relationships by establishing boundaries and building consistency in social-emotional wellness routines and goals

6-8 MASTERY

Civic, Financial and Economic Literacy	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to understand and evaluate the role of government and economy as it relates to citizen rights and responsibilities	Identify different types and roles of governments and economies Summarize citizen rights and responsibilities	Distinguish the roles of governments and economies as it relates to citizen rights and responsibilities	Evaluate and critique the role of our government and economy as it relates to citizen rights and responsibilities	Exercise citizen rights and responsibilities with appropriate and informed actions Justify the role of our government and economy and predict the impact as it relates to citizen rights and responsibilities
Students will be able to prioritize wants and needs by allocating time, resources and assets	Classify wants and needs Measure and compare the cost of time, resources and assets	Differentiate pros and cons of wants and needs Establish conclusions regarding the cost of time, resources and assets	Prioritize wants and needs by allocating time, resources and assets	Predict and evaluate the outcome of prioritization of wants and needs

6-8 MASTERY

Digital Literacy	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to use technology safely, legally and ethically, and to explain the rights, responsibilities and opportunities of participating in the digital world	Recognize rights and responsibilities of participating in the digital world Use, with support, technology safely, legally and ethically	Summarize the rights and responsibilities of participating in the digital world Demonstrate using technology safely, legally and ethically	Explain the rights, responsibilities and opportunities of participating in the digital world Apply rules for using technology safely, legally and ethically	Evaluate how different practices impact the rights, responsibilities and opportunities of participating in the digital world Model rules for using technology safely, legally and ethically
Students will be able to critically analyze digital sources, use technology to create and communicate with a variety of audiences and collaborate for education and other projects while using digital tools	Recognize rights and responsibilities of participating in the digital world Use, with support, technology safely, legally and ethically	Evaluate credibility of digital sources with minimal support Use appropriate technology to complete a task with minimal support Use digital tools to communicate and collaborate for educational purposes with minimal support	Critically analyze the credibility of digital sources Use technology to create and accomplish a goal Communicate with a variety of audiences Collaborate for education and other projects using digital tools	Defend the credibility of digital sources Utilize technology consistently to create and accomplish goals Initiate communication with a variety of audiences Lead collaboration for education and other projects using digital tools

6-8 AUTONOMY

Autonomy is having the self-confidence and motivation to think and act independently.

Communication	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to organize and express purposeful information in a modality appropriate to the environment and audience	Describe and organize information in different formats	Describe information and relationships between pieces of information in different formats to an audience	Organize and express purposeful information appropriate to the environment and audience	Organize and express purposeful information appropriate to the environment and audience while revising thinking based on audience feedback
Students will be able to interpret meaning from others' communications and respond effectively within different contexts	Distinguish between communicated ideas Sort through communicated ideas to process their own thinking	Identify categories of information from communicated ideas Process communicated ideas to construct a purposeful response	Interpret meaning from others' communications Respond effectively within different contexts	Draw conclusions and predict outcomes based on other's communication Use their own conclusions and predictions to form an arguable stance

6-8 AUTONOMY

Critical Thinking and Problem Solving	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to analyze and select key information and data from a variety of reliable sources to solve problems in a variety of situations across contexts	Identify key components of a problem Generate viable solutions to a problem List information from credible sources	Understand and demonstrate key components of a simple problem Choose viable solution(s) Use credible sources	Assess all components of a complex problem Justify viable solution(s) Cite evidence from multiple sources	Investigate multiple perspectives from credible resources Determine how solutions are applied to multiple scenarios based on new ideas, and thoughts Select most relevant evidence to formulate an optimal solution
Students will be able to critique issues, identify constraints and barriers and evaluate multiple perspectives to make and defend judgments and actions	Use concrete statements to describe key elements of an issue Make a judgement List obstacles	Ask questions to understand elements of an issue Develop a credible judgment Categorize obstacles and determine an action plan	Reflect and generate additional questions based on self- and/ or group-evaluation Identify obstacles from multiple perspectives Defend judgements and actions	Evaluate self and group perspectives Examine biases to predict obstacles Explain credible judgements and actions from various points of view

6-8 AUTONOMY

Creativity and Innovation	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to think abstractly in creative and artistic endeavors while recognizing their own strengths and the divergent contributions of other group members	Discern essential from non-essential concepts to determine those that are real but not directly tied to a concrete object using a predetermined framework Participate in a collaborative group with limited determination of roles or strengths using a predetermined framework	Discern essential from non-essential concepts to determine those that are real but not directly tied to a concrete object Participate in a collaborative group with limited determination of roles or strengths independently	Determine creative or artistic concepts that are real but not directly tied to a concrete object Integrate personal creative or artistic strengths with others to support a collaborative team	Generate creative or artistic concepts that are more abstract than concrete Model various roles within the group and leverages strengths of others

Collaboration and Teamwork	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to create appropriate group norms by preparing in advance for effective collaboration and engage by taking ownership of their individual responsibilities for a given role	Evaluate ideas for group norms in advance of collaboration Perform individual responsibilities in a collaborative group	Elaborate upon the ideas of others for group norms in advance of collaboration Critique actions to meet needs of individual responsibilities for a collaborative role	Establish appropriate group norms in advance of collaboration Enhance individual engagement by predicting how to meet the needs of that individual role	Generate new ideas for group norms in various settings Engage by taking ownership of individual responsibilities and supporting others in their roles
Students will be able to negotiate problem-solving practices through the solicitation of team members' perspectives and lead when appropriate to accomplish shared group goals	Establish possible solutions when negotiating a problem Participate within a team to accomplish shared goals	Predict solutions and come to a consensus to negotiate problem-solving when working as a team Collaborate with team members to create shared goals	Solve problems by using team members' perspectives to reach an agreement Lead team when appropriate to accomplish and create shared group goals	Develop solutions to multiple problems when leading a team Facilitate the development of group goals with the intention to include diverse perspectives when negotiating solutions to multiple problems

6-8 PURPOSE

Purpose guides life decisions, influences behavior, shapes goals, offers a sense of direction, and creates meaning.

Honesty, Integrity and Responsibility	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to recognize and acknowledge that their choices have intended and unintended outcomes now and in the future	Recognize how to use empathy Describe possible outcomes of choices	Apply empathy Acknowledge that choices have intended and unintended outcomes	Investigate alternative ways to show empathy Recognize and acknowledge choices have intended and unintended outcomes now and in the future	Display empathy while making decisions Determine the best choices based on possible outcomes
Students will be able to be proactive, organized and accountable in order to complete responsibilities, in addition to making contributions that positively impact their peers	Complete responsibilities Understand that contributions will impact peers	Evaluate the best way to complete responsibilities Predict how contributions will impact peers	Be proactive, organized and accountable when completing responsibilities Make contributions that positively impact peers	Predict implications of completed responsibilities Invite others to positively impact peers

6-8 PURPOSE

Hard Work and Resilience	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to design and implement educational and personal goals as well as begin to monitor and adjust with minimal prompting while beginning to explore occupational goals	List educational and personal goals Identify ways goals could be measured, with minimal prompting	Establish criteria for educational and personal goals with measurable outcomes while reflecting on long-term ideas for their future Adapt the goals on personal reflection, recognize possible obstacles	Develop educational and personal goals with measureable outcomes and begin to explore ocupational goals Monitor and edit the goals with minimal prompting	Design educational, personal and occupational goals with measurable outcomes which reflect long-term ideas for their future Evaluate and adapt the goals, recognizing possible obstacles
Students will be able to engage in "productive struggle" while continuing to understand and apply consistent interest, persistent effort and self-efficacy as they explore their boundaries and motivations within their environment	Identify what productive struggle is and explain ways in which consistent interest, persistent effort and self-efficacy lead to success Describe what boundaries look like and how they might differ between environments	Describe examples in which productive struggle takes place with consistent interest, persistent effort and self-efficacy Distinguish their boundaries and motivations within their environment	Demonstrate productive struggle with consistent interest, persistent effort and self-efficacy Investigate their boundaries and motivations within their environment	Develop experience in "productive struggle" while establishing consistent interest, persistent effort and self-efficacy Think through the implications of personal boundaries and defend your choices of where your boundaries lie

Lifelong Learning and Personal Growth	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to develop personal growth through self-direction and goal-setting to utilize knowledge, skills and values to influence ideas and actions across settings	Develop personal growth by recognizing goals, knowledge, skills and values to influence ideas and actions across familiar settings	Develop personal growth by constructing goals, knowledge, skills and values to influence ideas and actions across familiar settings	Develop personal growth by utilizing goals, knowledge, skills and values to influence ideas and actions across familiar settings	Develop personal growth by integrating goals, knowledge, skills and values to impact ideas and actions across familiar and unfamiliar settings

6-8 PURPOSE

Service	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to show empathy by selecting informal or identified formal service opportunities where assistance is needed	Develop empathy by identifying informal or formal service opportunities where assistance is needed	Develop empathy by prioritizing identified informal or formal service opportunities where assistance is needed	Show empathy by selecting informal or identified formal service opportunities where assistance is needed	Show empathy by guiding others to select formal or informal service opportunities
Students will be able to play a role in their communities by addressing selected needs and serving without expecting compensation or formal recognition	Identify needs and consider opportunities to serve in their community	Prioritize needs and plan to serve in their community without expecting compensation	Address selected needs and serve in their community without expecting compensation or formal recognition	Collaborate with others to plan and execute service in their community without expecting compensation or recognition

6-8 PURPOSE

Respect	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to model self-respect by understanding and appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Model self-respect by describing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Model self-respect by stating and demonstrating the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Model self-respect by understanding and appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Model self-respect by defending a position for appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy
Students will be able to model respect by utilizing supported adaptive strategies and interpersonal skills to recognize, understand, support and protect the rights associated with each member of their diverse community	Recognize the rights associated with each member of their diverse community by modeling respect and utilizing supported adaptive strategies and interpersonal skills	Recognize and understand the rights associated with each member of their diverse community through modeling respect by utilizing supported adaptive strategies and interpersonal skills	Recognize, understand, support and protect the rights associated with each member of their diverse community through modeling respect by utilizing supported adaptive strategies and interpersonal skills	Explain the need to support and protect the rights associated with each member of their diverse community through modeling respect by utilizing supported adaptive strategies and interpersonal skills

GRADES 9-12 MASTERY

Mastery is the ability to demonstrate depth of knowledge and skill proficiency.

Academic Mastery	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to analyze, synthesize and transfer academic content knowledge, skills and dispositions independently across multiple disciplines and contexts	Represent content knowledge, skills and dispositions across multiple disciplines Depict and connect academic knowledge, skills and dispositions across contexts Identify connections in academic knowledge, skills and dispositions across contexts	Organize content knowledge, skills and dispositions across multiple disciplines Compare and contrast academic knowledge, skills and dispositions and across contexts Connect and Integrate academic knowledge, skills and dispositions across contexts	Analyze content knowledge, skills and dispositions independently across multiple disciplines Synthesize academic knowledge, skills and dispositions independently across contexts Transfer academic knowledge, skills and dispositions independently across contexts	Establish conclusions and elaborate upon implications of acquired content knowledge, skills and dispositions independently across multiple disciplines Defend arguments using academic knowledge, skills and dispositions independently within and across contexts Generate arguments using academic knowledge, skills and dispositions independently across contexts
Students will be able to curate information to arrive at an evidence-based conclusion or solution	Categorize information by summarizing sources in order to arrive at evidence-based conclusions or solutions Revise conclusions or solutions based on evidence	Classify information by distinguishing sources to be used to arrive at evidence-based conclusions or solutions Establish evidence-based conclusions or solutions	Curate information by selecting and organizing sources to be used to arrive at evidence-based conclusions or solutions Decide on an evidence-based conclusion or solution	Deduce information by critiquing sources to be used to arrive at evidence-based conclusions or solutions Experiment on evidence-based conclusions or solutions

9-12 MASTERY

Wellness		Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to apply self-awareness to assess and monitor needs, set goals and routines and self-advocate for the supports they need to develop balance through mental, physical and social-emotional wellness	**Physical**	Recognize physical needs and strategies to address them	Prioritize strategies to work toward goal-setting and routines that effectively address physical needs	Implement strategies to develop goals and routines that effectively address physical needs	Adapt strategies, goals and routines based on personal reflection so physical needs are addressed
	Mental	Recognize healthy and unhealthy routines for coping with stress and uncomfortable emotions Explore a variety of healthy stress management routines and coping techniques, including advocating for needs with someone trusted	Prioritize mental health needs by setting goals and implementing strategies that are most effective for strengthening mental health Engage with appropriate resources and positive relationships	Apply strategies to develop routines and meet goals while monitoring changing mental health needs Act promptly when in need or treated unfairly by seeking out the most appropriate resources, including relationships	Revise routines so that they effectively address mental health needs and help develop balance with physical and social-emotional wellness Seek out new resources, including relationships, as they become available or as needs arise
	Social-Emotional	Research wellness strategies to cultivate personal growth and positive, healthy relationships	Employ wellness strategies to cultivate personal growth and set goals that prioritize positive, healthy relationships	Refine wellness strategies by working toward goals that provide balance and cultivate personal growth and continue positive, healthy relationships	Reflect on wellness strategies by creating and accomplishing new goals to cultivate personal growth, balance and positive, healthy relationships

9-12 MASTERY

Civic, Financial and Economic Literacy	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to use their knowledge of government and economic systems to defend civic choices and analyze and evaluate options	Identify government and economic systems Explain civic choices	Compare and contrast different types of government and economic systems Draw conclusions about civic options	Use knowledge of government and economic systems to analyze and evaluate civic choices Defend civic and economic choices	Apply knowledge of civic choices with appropriate and informed action Reflect on and adapt civic choices based on community implications
Students will be able to develop sustainable plans based on financial priorities using saving strategies and asset management skills	Identify financial priorities, saving strategies and asset management skills Describe key elements of a sustainable financial plan	Critique financial priorities and asset management skills Compare and contrast elements of sustainable and non-sustainable financial plans	Establish financial priorities using saving strategies and asset management Develop a sustainable financial plan	Reflect on and adapt financial priorities, saving strategies and asset management choices Set goals and make decisions to apply a sustainable financial plan for long-term financial stability

9-12 MASTERY

Digital Literacy	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to engage with people and ideas using technology safely, ethically and responsibly	Identify safe and ethical practices for using technology and engaging with others	Decide how to safely, ethically and responsibly engage with technology and ideas	Justify what is safe, ethical and responsible use of technology when engaging with people and ideas	Defend their choices for using technology safely, ethically and responsibly
Students will be able to investigate and evaluate digital sources, leverage appropriate technology to create innovative solutions and effectively communicate and collaborate while in social, academic and professional settings	Select and use digital sources Identify and use appropriate technology to complete a task Communicate and collaborate, with support, in social and academic settings	Collect and compare digital sources Select and use appropriate technology to create original works Communicate and collaborate appropriately in social and academic settings with minimal support	Investigate and evaluate digital sources Leverage appropriate use of technology to create innovative solutions Communicate and collaborate effectively while in social, academic and professional settings	Investigate, analyze and organize digital sources Justify the use of appropriate technology to create innovative solutions Initiate communication with a variety of audiences Lead collaboration in social, academic and professional settings

9-12 AUTONOMY

Autonomy is having the self-confidence and motivation to think and act independently.

Communication	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to develop and initiate communication through a variety of modalities appropriate for different environments and audiences	Specify communications that are appropriate to a designated environment and audience	Adapt communication modalities to fit the needs of the audience and environment	Develop and initiate communication through a variety of styles appropriate for different environments and audiences	Investigate different forms of communication, such as formal versus informal, to resolve and overcome obstacles for various audiences and environments
Students will be able to interpret meaning from others' communications, adapt their responses and apply understanding in relevant contexts	Discern meaning from others' communications Distinguish appropriate responses based on their understanding of the specific context	Classify meaning from others' communications Adapt their responses appropriately to relevant contexts	Interpret meaning from others' communications Adapt their responses and apply understanding in relevant contexts	Think through implications of meanings from others communications Develop responses to properly apply and clearly communicate in different contexts

9-12 AUTONOMY

Critical Thinking and Problem Solving	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to analyze and synthesize multiple perspectives of an issue to solve problems and be able to cite valid, reliable data and evidence that apply in a variety of situations across contexts	Acknowledge problems can have multiple perspectives Identify sources and resources to gather information and ideas Demonstrate how to find evidence	Identify multiple perspectives of an identified problem Collect information and ideas on potential solutions Gather sources of evidence and identify valid resources	Analyze multiple perspectives to solve a problem Synthesize ideas to solve a problem Cite evidence from multiple valid and reliable sources to solve a problem	Establish the most viable conclusions and solutions Implement ideas to realize solutions Integrate and document resources and knowledge to execute solutions
Students will be able to evaluate and defend their thinking, adjust their ideas based on new learning and create viable solutions to complex problems in unique and evolving situations	Identify ideas of self and others Demonstrate awareness of personal ideas and ideas of others Create a solution to a problem using information from credible sources	Establish ideas based on current thinking and points of view Formulate ideas of self and others Understand and demonstrate key components of a problem to generate a viable solution from a credible resource	Evaluate and defend thinking by describing the facts behind their point of view Develop questions that expand former thinking Elaborate about reasonable solutions	Explain the process of evaluating and defending ideas and perspectives Expand thoughts to infer new generalization of ideas Differentiate between viable and non-viable solutions and pursue realistic solutions

9-12 AUTONOMY

Creativity and Innovation	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to collaboratively complete creative design/innovation projects that are vision-inspired and focused on the user experience	Participate in collaboration on project design with a predetermined framework Investigate new ideas or improvements with predictable ideas Develop steps to establish usability, purpose and functionality Construct a project where several design elements are unconnected	Collaborate to plan a creative or innovative project Organize conventional ideas in non-predictable ways Create a project that has some feasibility or applicability Construct a project with interesting elements that may be connected to the final use	Collaborate to complete a creative or innovative project Expand design conventions or uses common materials in new, clever or surprising ways Produce a creative design or project that appeals to the user experience Craft a complete project designed with a distinct style which applies to the identified purpose	Engage in student-guided collaboration where teammates are challenged to develop and complete a creative or innovative project Execute an unconventional design using familiar materials in new ways resulting in a unique end project Produce a project that focuses on applicability to the user experience or society Craft a project that has an innovative and striking design that is vision-inspired, well-crafted and exceeds expectations for purpose
Students will be able to identify a meaningful problem or opportunity, explore creative solutions with a team, produce original work and determine the best design to meet specific needs, testing and revising as necessary	Determine and research innovative concepts and others' innovations Clarify the problem within a group Identify innovations and their impacts using an existing framework Use a predetermined testing protocol and makes revisions to project without seeking feedback	Develop ideas about the purpose for innovation Imagine solutions to a problem in a collaborative setting while acknowledging others' perspectives Evaluate the ideas and solutions of others before selecting one Use an existing framework and feedback to test and revise project	Evaluate decisions regarding the purpose driving the process of innovation Generate different and creative perspectives during gathering of information Create a plan to investigate and evaluate different ideas and determine the best solution Utilize testing and revision to generate a well-crafted, useful project that is unique, surprising or inspiring	Explore and expands on the purpose for innovation Promote ways that divergent and creative perspectives impact creativity and innovation Investigate, experiment and test other implications or applications for the selected solution Evaluate the significance of well-crafted projects that are unique, surpringing, inspiring or positively affect society

9-12 AUTONOMY

Collaboration and Teamwork	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to contribute to and work effectively in teams by leveraging various tools and resources, adapting to multiple roles and facilitating connections of diverse perspectives to accomplish shared goals	Identify what it means to contribute as an effective team member Select various tools to utilize as a team to accomplish shared goals Recognize there are multiple roles within a team Acknowledge your own perspective and how it fits in with the team to accomplish shared goals	Practice what it means to contribute as an effective team member Establish criteria for which tools are most useful to the team Develop a strategy for supporting and performing various roles within the team Understand the importance of diverse perspectives within a team to help accomplish shared goals	Contribute in specific ways and work effectively in teams Leverage various tools and resources to accomplish shared goals Perform and adapt to multiple roles within a team as needed Facilitate connections of diverse perspectives to accomplish shared goals	Experiment in ways that stretch you as a contributor within a team Research new tools and resources Generate and practice new roles within a team Distinguish and explain features of diverse perspectives that helped accomplish shared goals
Students will be able to create shared responsibility for collaborative work and value the individual contributions made by each team member to cultivate a culture of community	Set goals for assigned role in collaborative work Make a plan aligned to expectations for fulfilling specific roles and establish criteria for successful individual contributions	Reach individual goals within a collaborative work setting Recognize obstacles to individual contributions that can be removed and adapt accordingly to build group cohesiveness	Create shared responsibility in working collaboratively toward group goals Respect and acknowledge the individual contributions made by each team member to cultivate a culture of community	Research and implement best practices for participating in collaborative work experiences Distinguish features of collaborative communities and how to deliberately support individuals in the future

9-12 PURPOSE

Purpose guides life decisions, influences behavior, shapes goals, offers a sense of direction, and creates meaning.

Honesty, Integrity and Responsibility	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to display empathy while making decisions, be accountable for their actions and consider the implications of their choices	Explain empathy Understand personal responsibility for actions Recognize that choices have implications for others	Recognize actions that show empathy while making decisions Accept responsibility for actions Reflect on another's perspective	Display empathy while making decisions Demonstrate accountability for actions Consider the implications of choices and how they affect others	Perceive broader impact of empathy on community or society Encourage accountable behaviors in others Use feedback to set goals and monitor choices in a variety of settings
Students will be able to follow through on commitments and make contributions that positively impact their peers and community	Accept given responsibilities Understand that contributions will impact peers and community	Make commitments to fulfill responsibilities Predict how contributions will impact peers and community	Follow through on commitments Make contributions that positively impact their peers and community	Use strategies to follow through on commitments Invite others to positively impact peers and community

9-12 PURPOSE

Hard Work and Resilience	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to design, implement, monitor and adjust measurable, multi-step educational, occupational and personal goals	Identify measurable educational, occupational and personal goals Organize goals into educational, occupational and personal categories	Decide measurable educational, occupational and personal goals with criteria established to measure success Recognize possible obstacles to the goals	Develop measurable and multi-step educational, occupational and personal goals with criteria established to measure success Adapt as new obstacles are observed to the goal	Generate several measurable multi-step educational, occupational and personal goals with criteria established to measure success Predict future obstacles to educational, occupational and personal goals
Students will be able to engage in "productive struggle" with consistent interest, persistent effort and self-efficacy as they refine their boundaries and motivations within their environment	Recognize opportunities for "productive struggle" and persistent effort in one's individual experiences Describe motivations for success	Establish criteria for "productive struggle" and persistent effort in learning from one's individual experiences Evaluate motivations for success	Develop purposeful effort with a sustained interest in learning Adjust, as needed, motivations for success	Explain self-efficacy and resilience as it relates to individual choices and experiences Predict motivations needed for success

Lifelong Learning and Personal Growth	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to demonstrate personal growth through setting, monitoring and achieving goals to pursue knowledge, skills and values to guide ideas and actions across settings	Demonstrate personal growth by selecting goals, knowledge, skills and values to practice ideas and actions across a variety of familiar settings	Demonstrate personal growth by pursuing goals, knowledge, skills and values to guide ideas and actions across familiar and unfamiliar settings	Demonstrate personal growth by pursuing, monitoring and achieving goals, knowledge, skills and values to guide ideas and actions across a variety of familiar and unfamiliar settings	Demonstrate personal growth by modifying goals, knowledge, skills and values based on monitoring of progress to direct ideas and actions across a variety of familiar and unfamiliar settings

9-12 PURPOSE

Service	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to show empathy by seeking and recognizing both informal and formal service opportunities where assistance is needed	Develop empathy by identifying informal and formal service opportunities	Develop empathy by recognizing and prioritizing informal and formal service opportunities where assistance is needed	Show empathy by independently seeking and selecting informal and formal service opportunities where assistance is needed	Show empathy by adapting prior service experience to engage others in new informal and formal service opportunities
Students will be able to engage civically in communities (local and global) by addressing recognized needs and serving without expecting compensation or recognition	Consider and identify opportunities to serve in local and global communities	Recognize and prioritize local and global community needs without expecting compensation	Address recognized needs and serve in local and global communities without expecting compensation or recognition	Organize and lead service in local and global communities without expecting compensation or recognition

9-12 PURPOSE

Respect	Emerging Competence	Approaching Competence	Competent	Extending Competence
Students will be able to apply self-respect through establishing and expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Apply self-respect by identifying the unique values, privileges and needs associated with the student's own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Apply self-respect by identifying and establishing the unique values, privileges and needs associated with the student's own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Apply self-respect by establishing and expressing the unique values, privileges and needs associated with the student's own cultural, racial, political and interpersonal groups to promote personal well-being and self-advocacy	Apply self-respect by expressing and explaining the unique values, privileges and needs associated with the student's own cultural, racial, political and interpersonal groups to advance personal well-being and self-advocacy
Students will be able to generate and utilize adaptive strategies, independently, for recognizing, understanding, supporting and advocating for the rights and the unique values, contributions and needs associated with each member of their diverse community	Recognize the rights and the unique values, contributions and needs associated with each member of their diverse community by generating and utilizing adaptive strategies, independently	Recognize and understand the unique values, contributions and needs associated with each member of their diverse community by generating and utilizing adaptive strategies, independently	Recognize, understand, support and advocate for the rights and the unique values, contributions and needs associated with each member of their diverse community by generating and utilizing adaptive strategies independently	Defend a position for the rights and the unique values, contributions and needs associated with each member of their diverse community, generating and utilizing adaptive strategies independently

POSTSECONDARY MASTERY

Mastery is the ability to demonstrate depth of knowledge and skill proficiency.

Academic Mastery	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to utilize prior knowledge to emerge as contributors in their field of expertise or profession and apply this knowledge across diverse settings and new contexts	Identify, explore and organize prior and new knowledge towards a desired field of expertise or profession	Represent academic content knowledge, skills and dispositions Describe relationships between familiar and new academic content knowledge, skills and dispositions Identify potential uses for academic content knowledge, skills and dispositions	Contribute new knowledge and perspectives in field of expertise or profession	Research and report results with mastery in field of expertise or profession
Lifelong learners will be able to curate information to reach evidence-based outcomes, advancing their field of expertise or profession and adding to the collective knowledge base	Summarize information that advances a field of expertise or profession in order to arrive at evidence-based outcomes and contribute to the collective knowledge base	Organize information that advances a field of expertise or profession in order to arrive at evidence-based outcomes and contribute to the collective knowledge base	Curate information that advances a field of expertise or profession in order to arrive at evidence-based outcomes and contribute to the collective knowledge base	Generate information that advances a field of expertise or profession in order to arrive at evidence-based outcomes and contribute to the collective knowledge base

POSTSECONDARY MASTERY

Wellness		Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to evaluate and adjust self-awareness and self-advocacy skills, be adept in achieving goals, maintain wellness habits and seek out supports to create lifelong balance through mental, physical and social-emotional well-being	**Physical**	Reflect on physical health needs, wellness habits and goals Research community supports for physical wellness	Set attainable goals to build physical wellness habits Recognize community supports for physical wellness	Evaluate and adjust goals to maintain physical wellness habits Seek out community supports for personal physical wellness	Adapt goals to create lifelong physical wellness habits Participate in community supports for physical wellness
	Mental	Reflect on mental health needs Research the mental health resources available in the community and determine when professional health services may be required	Apply measurable and timely goals to design and implement a plan for maintaining lifelong mental health habits Recognize enhanced role in advocating for mental health during the transition from minor to adult	Evaluate and adjust how to determine mental health needs and how to advocate for the supports needed to maintain mental health well-being	Adapt goals, routines and self-advocacy skills to create a lifelong balance in mental health well-being
	Social-Emotional	Reflect on current relationships Determine present and future social-emotional needs and goals	Recognize positive and negative aspects of current relationships Strategize how to achieve present and future social-emotional needs and goals	Evaluate and adjust current relationships Seek out social-emotional supports from relationships Achieve present social-emotional needs and goals	Maintain and adapt positive healthy relationships that assist in achieving present and future social-emotional needs and goals

POSTSECONDARY MASTERY

Civic, Financial and Economic Literacy	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to integrate diverse civic choices by advocating for their individual belief system within their community and society	Clarify their individual belief system by investigating community and societal issues and possible civic choices	Research and take positions on diverse civic choices based on their individual belief system in order to impact their community and society	Integrate diverse civic choices into everyday life and advocate for their individual belief system within their community and society	Assess and evaluate the implications of their civic choices and adjust their belief system or actions to continue to impact the civic processes within their community and society
Lifelong learners will be able to implement and manage individual fiscal priorities	Establish fiscal priorities and create an initial financial plan	Refine a financial plan with fiscal priorities including personal budgeting	Implement and manage individual fiscal priorities	Reflect and continue to adapt a detailed financial plan based on outcomes and implications of implementing the plan

Digital Literacy	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to select and use appropriate technology and digital sources safely, ethically and productively in school, work and life	Classify types of technology and digital sources to determine the appropriate option for use in school, work and life	Evaluate types of technology and digital sources to determine the appropriate option for use in school, work and life	Adapt to new conditions by selecting and using appropriate technology and digital sources safely, ethically and productively in school, work and life	Research new technology and ethical approaches and adapt them to school, work and life
Lifelong learners will be able to independently apply current best practices and think critically when using technology in social, academic and professional settings	Recognize current best practices Identify implications of using technology in social, academic and professional settings	Explain current best practices Describe the implications of using technology in social, academic and professional settings	Apply current best practices Think critically about implications of using technology in social, academic and professional settings	Research and adapt best practices for evolving situations Raise awareness of the implications of using technology in social, academic and professional settings

POSTSECONDARY AUTONOMY

Autonomy is having the self-confidence and motivation to think and act independently.

Communication	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to generate and initiate communication effectively and professionally, through a variety of modalities, adapting their understanding with application to novel concepts, forms and contexts within various environments and audiences	Determine and decide the intended meanings from others' communications and develop and/or select a strategy for responding using different professional modalities	Selectively choose a form of communication to reach a specified audience and goal and adjust based on results	Generate and initiate communication effectively and professionally, through a variety of modalities, adapting their understanding with application to novel concepts, forms and contexts within various environments and audiences	Think through implications of complex communication scenarios, develop creative communication strategies and determine solutions for communication challenges in an advancing society
Lifelong learners will be able to consistently evaluate the meaning of others' communications, modify responses and effectively communicate within a global and technologically advancing society	Experiment with and clarify the intended meanings from others' communication Develop their responses to properly communicate using different modalities	Predict and clarify intended meanings of others' communications Generate responses based on new methods of information sharing	Consistently evaluate the meaning of others' communications Modify responses to others' communications in order to effectively communicate within a global and technologically advancing society	Think through the implications and meaning of complex messages in both professional and nonprofessional settings Select the best method of communication to deliver messages and creatively use new and evolving forms of communication in order to resolve challenges

POSTSECONDARY AUTONOMY

Critical Thinking and Problem Solving	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to investigate and take a stance on complex issues, making sure to address bias in information and beliefs and propose and defend solutions that lead to deliberate choices and actions	Explore issues Acknowledge different sides to issues exist Define bias Acknowledge multiple solutions could exist	Investigate issues using a variety of resources State different sides of an issue Recognize bias by differentiating facts from opinions Suggest different solutions	Investigate issues utilizing a variety of reliable resources Propose and defend solutions based on the evidence collected Address bias internally and externally Propose and defend solution(s)	Investigate issues utilizing reliable resources from multiple perspectives Articulate implications and their impact on solutions Explain bias Implement solution(s)

POSTSECONDARY AUTONOMY

Creativity and Innovation	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to collaborate and problem solve in order to complete and manage real-world original or innovative projects	Recognize the value of collaboration and engages in creative decision making Construct a project that meets expectations for purpose Participate in collaboration to complete projects in a timely manner	Collaborate to problem solve and considers options when making creative decisions Produce an original or innovative project with a shared vision that meets expectations for purpose Engage in collaboration to complete projects in a timely manner	Collaborate in a variety of settings to problem solve and engage in creative decision making Craft an original and innovative project with a shared vision that exceeds expectations for purpose Manage collaboration to complete projects in a timely manner	Initiate a collaborative setting to generate creative decisions Distribute a real-world, innovative project with a shared vision that exceeds expectations for purpose Facilitate and monitor the creative and innovative process to reflect, revise and evaluate in a timely manner
Lifelong learners will be able to revolutionize and positively affect society as a result of their creative and innovative efforts	Identify needs based on social themes and historical context Recognize the need for well-crafted projects in society that are unique, surprising or inspiring	Investigate social themes, historical context and cultural components to identify user needs Explore the social impact of well-crafted projects that are unique, surprising or inspiring	Reflect on social themes, historical context and cultural components in order to transform information and ideas into creative solutions Evaluate continuously the significance of well-crafted projects that are unique, surprising, inspiring and revolutionary to positively affect society	Predict needs and synthesizes creative solutions while continually evaluating the value of the innovation for society Inspire others to innovate and design well-crafted projects or ideas that are unique, surprising, inspiring and revolutionary to positively affect society

POSTSECONDARY AUTONOMY

Collaboration and Teamwork	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to create, contribute and analyze the work of diverse teams in a variety of contexts by vetting current and evolving tools and resources, adapting to multiple roles and connecting various perspectives to accomplish a shared goal	Evaluate the work of diverse teams and roles in consideration of various perspectives Organize tools and resources for use across various contexts Proactively navigate opportunities to leverage individual strengths while developing shared goals	Establish criteria for incorporating various perspectives into multiple roles within a diverse team Analyze tools and resources for effectiveness across various contexts Distinguish the use of essential information, such as vetting resources and integrating multiple roles to identify a shared goal	Adapt the work of diverse teams and multiple roles in response to various perspectives both within and beyond the group Establish criteria for the effectiveness of current and evolving tools and resources for use across diverse teams and various contexts Recognize obstacles for the use of essential information, such as vetting resources for multiple roles to develop shared goals	Predict the work of diverse teams and multiple roles in response to various perspectives both within and beyond the group Generate a comprehensive bank of current and evolving tools and resources for use across diverse teams and various contexts Explain the impact of obstacles in relation to vetting resources and various perspectives for multiple roles in the accomplishment of shared goals
Lifelong learners will be able to elevate the work of others, share ownership of collaborative work, value the individual contributions made by each team member and create cultures of community in a variety of situations	Utilize work of others Assume responsibility and ownership for individual role Recognize contributions of some members Contribute to the culture of community by identifying and sharing values and expectations to be used as norms that contribute to a culture of community	Elaborate on the work of others Actively incorporates individual contributions into collective work Recognize contributions by all members Foster a culture of community by referencing and referring to team culture and norms in a variety of situations	Highlight and emphasize the work of others Assume collective ownership of the work with all members of the team Appreciate contributions of all members Champion and defend the community of culture in a variety of situations	Develop arguments to promote contributions of others Share ownership by acknowledging the interdependent nature of the collaborative work Praise and critique contributions of all members Evaluate team dynamics in new groups and develop strategies to promote a culture of community

POSTSECONDARY PURPOSE

Purpose guides life decisions, influences behavior, shapes goals, offers a sense of direction, and creates meaning.

Honesty, Integrity and Responsibility	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to make decisions with intention and take accountability for their actions while modeling and advocating for others to do the same	Contemplate outcomes and display empathy when making decisions Take accountability for actions	Establish criteria when making decisions Model accountability for actions with others	Make decisions with intention using criteria Take accountability for actions while modeling and advocating for others to do the same	Make decisions with intention using established, self-identified criteria Use the opportunity to take accountability for actions to self-reflect and seek personal growth while advocating for others to do the same
Lifelong learners will be able to manage their time effectively in order to follow through on commitments and make contributions that positively impact their peers, community and global society	Follow through on commitments Understand that contributions will impact peers, community and global society	Determine strategies to effectively manage time to follow through on commitments Predict how contributions will impact peers, community and global society	Manage time effectively to follow through on commitments Make contributions that positively impact peers, community and global society	Theorize potential improvements while planning to follow through on commitments Invite others to positively impact peers, community and global society

POSTSECONDARY PURPOSE

Hard Work and Resilience	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to design, implement, monitor and adjust measurable, multifaceted educational, occupational and personal goals as they transfer their knowledge and skills to a variety of work and life events	Decide educational, occupational and personal goals with criteria established to measure success Predict possible knowledge and skills needed to a variety of work and life events	Develop educational, occupational and personal goals with criteria established to measure success Defend choices for the knowledge and skills needed to a variety of work and life events	Experiment with educational, occupational and personal goals with criteria established to measure success Test knowledge and skills through a variety of work and life events	Explain specific successes within their educational, occupational and personal goals Research the consequences of choices to discover different possible solutions to a variety of work and life events
Lifelong learners will be able to apply previous experiences of "productive struggle" to continue growing while managing boundaries and motivations within their environment	Recognize obstacles to "productive struggle" from previous experiences Establish boundaries and motivations needed for success within their environment	Generate specific goals to grow and learn from previous experiences Predict what boundaries and motivations are needed for success within their environments	Explain how "productive struggle" helps them to continue to grow and learn from their previous experiences Explain boundaries and motivations within their environment for success	Think through how "productive struggle" helps them learn from previous experiences Distinguish features of boundaries and motivations that help one achieve personal success

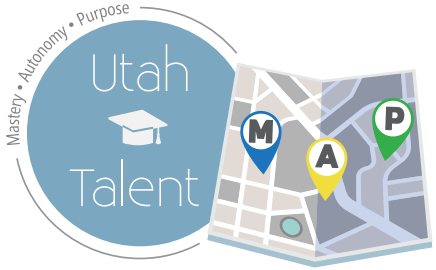
Lifelong Learning and Personal Growth	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners continuously pursue personal growth by setting and reflecting on goals to advance knowledge, skills and values to optimize decision-making across settings	Pursue lifelong learning by expanding personal growth opportunities, independent of outside influences, by establishing personal goals and advancing knowledge, skills and values to make decisions across unfamiliar settings	Pursue lifelong learning by experimenting with personal growth opportunities through assessing personal goals and advancing knowledge, skills and values to improve decision-making across unforseen settings	Pursue lifelong learning by reflecting on personal growth opportunities and goals while advancing and appraising knowledge, skills and values to optimize decision-making across all settings	Pursue lifelong learning by prioritizing personal growth and goals, investigating new opportunities and connecting knowledge, skills, and values to enhance decision-making in order to adapt to any setting

POSTSECONDARY PURPOSE

Service	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to show empathy by investigating community needs and collaborating with stakeholders to determine and develop solutions for those needs	Develop empathy by listing possible resources and stakeholders to outline solutions for community needs	Develop empathy by determining best resources and most relevant stakeholders and predicting barriers to developing solutions for community needs	Show empathy by investigating community needs, collaborating with stakeholders and determining and developing solutions for community needs	Show empathy by leading a group to research community needs and determine and develop solutions for an identified project
Lifelong learners will be able to engage civically by reaching out and including community stakeholders in the execution and evaluation of their solution to community needs	List possible solutions to local and global community needs with stakeholders	Plan solutions to local and global community needs with stakeholders	Execute then evaluate solutions for local and global community needs by reaching out and including community stakeholders	Generate and organize, in partnership with stakeholders, a sustainable service protocol for future local and global community needs

POSTSECONDARY PURPOSE

Respect	Emerging Competence	Approaching Competence	Competent	Extending Competence
Lifelong learners will be able to generalize self-respect by establishing and appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being, self-advocacy and contribution to their diverse community	Generate self-respect by exploring and appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to exercise personal well-being, self-advocacy and contribution to their diverse community	Generate self-respect by researching and appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to promote personal well-being, self-advocacy and contribution to their diverse community	Generalize self-respect by establishing and appropriately expressing the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to advance personal well-being, self-advocacy and contribution to their diverse community	Advance self-respect by appropriately expressing and thinking through the implications surrounding the unique values, privileges and needs associated with their own cultural, racial, political and interpersonal groups to solidify personal well-being, self-advocacy and contribution to their diverse community
Lifelong learners will be able to generate and utilize adaptive strategies and advocacy, independently, for recognizing and understanding the rights associated with all community members to contribute to the global community	Develop theories to recognize the rights associated with all community members in order to contribute to the global community by generating and utilizing adaptive strategies and advocacy independently	Experiment on the theories to recognize and understand the rights associated with all community members in order to contribute to the global community by generating and utilizing adaptive strategies and advocacy independently	Demonstrate the recognition and understanding of the rights associated with all community members in order to contribute to the global community by generating and utilizing adaptive strategies and advocacy independently	Defend a position for the recognition and understanding of the rights associated with all community members in order to contribute to the global community by generating and utilizing adaptive strategies and advocacy independently



Utah's Portrait of a Graduate identifies the ideal characteristics of a Utah graduate after going through the K-12 system. These are aspirations not necessarily meant to be quantified and measured. These characteristics begin at home and are cultivated in educational settings.

KnowledgeWorks

KnowledgeWorks is a national nonprofit organization advancing a future of learning that ensures each student graduates ready for what's next. For more than 20 years, we've been partnering with states, communities and leaders across the country to imagine, build and sustain vibrant learning communities. Through evidence-based practices and a commitment to equitable outcomes, we're creating the future of learning, together. Learn more at KnowledgeWorks.org.

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APPENDIX J:

LEARNING GOALS AND SUCCESS CRITERIA TEMPLATES

Meaningful Learning Goals *and* Success Criteria Checklists

Learning Goals Checklist

Are the Learning Goals:

Aligned to the standards?

Learning Goals often begin with verbs like *know*, *develop*, *become fluent*, *apply*, *understand*, *use*, or *extend*.

- ☐ **How does your Learning Goal's verb reflect the expectation of the standard?**

Learning Goals describe what students are going to learn.

- ☐ **What learning needs to occur for your students to meet the expectations of the standard?**

Achievable within the context of the lesson?

Learning Goals specify the learning that is intended for a lesson.*

- ☐ **Given the planned length of your instruction, is it possible for students to accomplish the Learning Goal within the timeframe of the lesson?**

* The word "lesson" may refer to the learning plan for a single class period or could reflect a learning plan that covers several days. It's a coherent set of learning opportunities focused on the same content and goals.

Written in language that is accessible to students?

Review the language of the Learning Goal.

- ☐ **Can each one of your students read the Learning Goal on their own and understand its meaning?**

Student access also relates to how the Learning Goal is communicated to students.

- ☐ **What is your plan for explicitly spending time discussing the Learning Goal with students and ensuring they have a clear picture of what they mean?**

A strategy for developing an accessible Learning Goal is the co-construction of Learning Goals with students.

- ☐ **How could students be involved in the creation of the Learning Goal?**

Focused on student learning?

Learning Goals become less useful when they focus on the context of the learning as opposed to the learning itself ("To understand the effects of fire on water" vs. "To understand the effects of heat on liquids").

- ☐ **Is your Learning Goal focused on the details or on the concepts and practices?**

Worth learning?

Learning Goals need to reflect worthwhile learning in the course of a lesson.

- ☐ **Does the Learning Goal communicate what student learning is important and valued?**

Learning Goals should be connected to the larger progression of learning.

- ☐ **How will you ensure that students understand the connection between Learning Goals and their prior learning?**

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Success Criteria Checklist

Are the Success Criteria:

Closely aligned to the Learning Goals?

A Learning Goal comes before the learning experience, meaning the Learning Goal must be established before the Success Criteria are considered.

- ☐ **Have you asked "Why will my students be learning this?" before asking "What will my students be doing?"?**

Success Criteria often begin with verbs like *explain, describe, model, show, write, justify,* or *create.*

- ☐ **How do the verbs in your Success Criteria reflect the expectation of the Learning Goal?**

The Success Criteria are indicators that both the teacher and students will use to know if students have actually met the Learning Goal.

- ☐ **Are the Success Criteria clear descriptions of the student learning performances that provide evidence that the Learning Goal was met?**

Observable?

Success Criteria should refer to a concrete learning performance.

- ☐ **Do your Success Criteria focus on something students will say, do, make, or write that indicates they are moving toward the Learning Goal?**

Able to be demonstrated within the lesson?

Students should be able to accomplish the Success Criteria within the context of, and time allocated for, the lesson.*

- ☐ **Is it reasonable to expect that each of your students can demonstrate their learning through the learning performances outlined in the Success Criteria given the time allotted for the lesson?**

* The word "lesson" may refer to the learning plan for a single class period or could reflect a learning plan that covers several days. It's a coherent set of learning opportunities focused on the same content and goals.

Written in language that is clear and accessible to students?

Student access also relates to how Success Criteria are communicated to students.

- ☐ **What is your plan for explicitly spending time discussing the Success Criteria with students and ensuring they have a clear picture of what Success Criteria mean?**

Review the language of the Success Criteria.

- ☐ **Can each one of your students read the Success Criteria on their own and understand what is expected of them?**

A strategy for developing accessible Success Criteria is the co-construction of Success Criteria with students.

- ☐ **How can students be involved in the creation of the Success Criteria?**

Focused on student learning?

Success Criteria need to reflect what students need to say, do, make, or write to show that they have met the Learning Goal.

- ☐ **Do the Success Criteria describe the student performances of a skill or understanding that will demonstrate that the Learning Goal has been accomplished?**

Credit to Kentucky Department of Education

CUSTOM CLASS
CHARTER SCHOOL

LEARNING goal

Students will learn to describe a character in depth using key details from a story.

ELA Standard 6.R.6

SUCCESS criteria

- **I can identify five key details about a character in a story**
- **I can determine what each detail shows about the character**
- **I can use each key detail to describe the character**

CUSTOM CLASS
CHARTER SCHOOL

LEARNING goal

Students will learn to describe and summarize a data set.

Math Standard 6.SP.5

SUCCESS criteria

- **I can identify the number of observations, what was observed, and in what units it is measured.**
- **I can describe the overall pattern of the data and any outliers.**
- **I can summarize the data by using measures of center, such as mean.**

CUSTOM CLASS
CHARTER SCHOOL

APPENDIX K:

USBE NEXT GENERATION SCHOOL ACCOUNTABILITY REPORT

Next Generation School Accountability in Utah

A Report of the Utah Accountability Redesign Advisory Committee to the Utah State Board of Education

Received by the Board on NOVEMBER 3, 2022

Utah State Board of Education

KnowledgeWorks

Center for Assessment

Passed ADA Accessibility November 2022

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EXECUTIVE SUMMARY

The report presents recommendations for the redesign of Utah's School Accountability System. The overarching goal of the redesign process was to create a system that supports schools in implementing a Personalized and Competency Based learning system and facilitating student achievement of the knowledge, skills, and dispositions represented by Utah's Portrait of a Graduate. Another key goal was to make the system as simple and transparent as possible while recognizing that evaluating school quality is a complex endeavor.

The recommendations stem from the Accountability Redesign Advisory Committee as well as from broad-based community input. The Advisory Committee engaged in almost a year-long deliberative process working through the development of a detailed theory of action, articulating clear principles to guide the selection of indicators and the system design, and offering policy recommendations to support the proposed system design. The 29 Advisory Committee members represented school and LEA leaders, LEA assessment directors, teachers, and parents. The Advisory Committee is composed of members from the following stakeholder groups: Assessment Directors, Teachers, LEA Specialists (Growth, Special Education, DTL, ALS, Ed Tech), Executive Directors, Superintendents, Assistant Superintendents, Local Board, principals, and Parents.

The Executive Committee was comprised of key Utah policymakers. The Executive Committee met three times to help establish the "ground rules" for the overall system and to review the early work of the Advisory Committee. The full Executive Committee was not able to meet during the fall of 2022 due to scheduling challenges. However, approximately half of the Executive Committee was able to convene and review this report on October 31, 2022. They did not think they should vote to accept or endorse the report without a quorum present, but one of the Committee co-chairs suggested that we note that the Executive Committee "received the report." All participating Executive Committee members agreed with that position.

The Committees put forth several important recommendations, but we present two of the most important ones in this summary:

- Inclusion of local indicators, and
- Use of a "profile approach" for reporting accountability results.

Inclusion of local indicators

The Advisory Committee recognized that if organizations are to improve, they must have some control over their goals, processes, and evaluations. Therefore, the system should require the full inclusion (i.e., they count) of local indicators in the following three domains.

A. **School Climate:** The Advisory Committee strongly favors including school climate as a local indicator because of the important role that a positive school climate plays in supporting PCBL implementation.
B. **Supporting Learner Agency:** Supporting learner agency and school climate are two important intermediate indicators in the theory of action, so the Committee thought it was important to require all schools to gather data on the degree to which they are supporting students in developing the ability to guide and monitor their own learning. Further, the Committee

recommended that USBE support the development and use of high-quality learner agency tools and processes.

C. **Portrait of a Graduate:** The Advisory Committee felt strongly that local LEAs should choose between one and three Portrait of Graduate characteristics as part of their local indicator system.

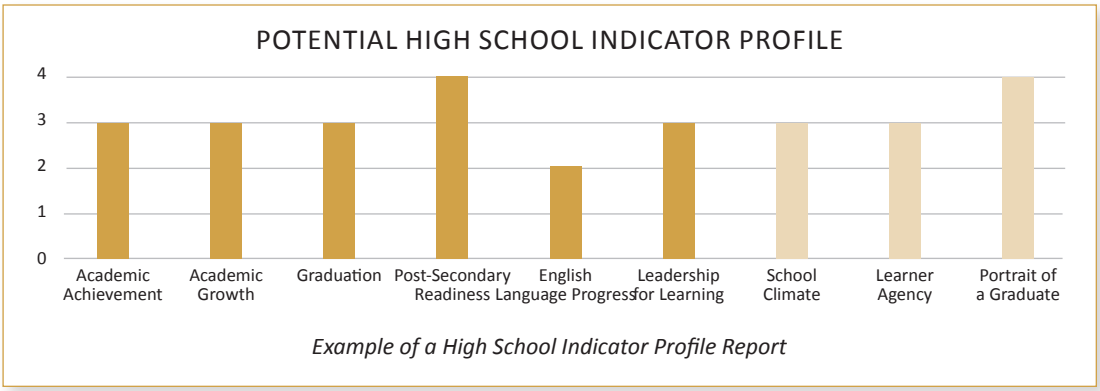
The Advisory Committee clearly supports the use of local indicators in the accountability system. But it also recognizes that it would be challenging for many of Utah's LEAs and schools to engage in this work meaningfully without considerable state support and guidance. Additionally, the Committee recommended phasing in the use of local indicators as school and LEAs developed the capacity to fully implement the new system.

Use of a "profile approach" for reporting accountability results

The Advisory Committee recommends using a "dashboard" or "profile" approach for displaying the results like the example for high school below. The advantage of this approach is the transparency that comes with prominently displaying every indicator rating, rather than obscuring such information in a total score and/or school grade. Many are familiar with the Consumer Reports rating scheme that offers a wealth of information about various products. For example, when evaluating automobiles, Consumer Reports generally includes information about predicted reliability and satisfaction, road test results, mileage, acceleration, braking distance, routine handling, emergency handling, and noise. While Consumer Reports produces a type of total score (e.g., "best buy"), they do not feature in the same ways as these distinct indicator scores. Someone who's interested in acceleration and emergency handling is likely to focus on different indicators than someone who's interested in reliability and mileage. The advantage of the profile approach is that it allows each user to tailor the report to their preferences, while making all indicator ratings fully visible, not obscured by a complex score calculation.

While the dashboard or profile approach does not rely on a total score to provide information to stakeholders, such an approach must have a clear and consistent way to evaluate each school's performance on each reported indicator. Typically, states report indicators using a 3, 4, or 5-point scale (or shaded parts of a circle, for Consumer Reports). The Advisory Committee recommended using a 4-point scale for each state and local indicator.

If the goal is to support Portrait of a Graduate and PCBL implementation, schools and LEAs need to be able to easily monitor their own progress on these indicators. The profile approach makes this easy to do so and to communicate with local stakeholders.



Example of a High School Indicator Profile Report

Policy Recommendations

Much of the current Utah accountability system is prescribed by state law. Therefore, many of the recommendations for a revised system will need to be permitted by changes in the existing statutes and regulations. The committees offered several recommendations in two major categories—accountability and school improvement—designed to facilitate the implementation of the design recommendations presented in this report.

INTRODUCTION AND CHARGE

The Utah State Board of Education (USBE) released a Request for Proposals (RFP) during the summer of 2021 for a firm to support the redesign of Utah's School Accountability System so that it's more aligned with Personalized, Competency-Based Learning and Utah's Portrait of a Graduate, but still simple and transparent. The National Center for the Improvement of Educational Assessment (Center for Assessment), along with KnowledgeWorks, was awarded the contract to lead this important work for USBE.

> Utah's Portrait of a Graduate identifies the ideal characteristics of a Utah graduate after going through the K-12 system. These are aspirations not necessarily meant to be quantified and measured. These characteristics begin at home and are cultivated in educational settings.
>
> Personalized, Competency-Based Learning (PCBL) moves the focus of the classroom from teaching to learning based on fixed and well-defined targets for all students. It provides equitable access for each student to demonstrate core knowledge and skills in personalized and differentiated ways and can also empower students to engage in opportunities for deeper learning. PCBL moves instruction beyond information dissemination to a focus on transferable skills necessary for success in the modern world.

The current Utah School Accountability System was established through S.B. 220 during the 2017 legislative session, prior to the Personalized, Competency-Based Learning and Portrait of a Graduate initiatives. The Utah State Board of Education (USBE) wanted to reexamine the theory of action that underpins Utah's school accountability system. In addition, the pandemic highlighted the shortcomings of a state accountability system's heavy reliance on state assessment results. Given these dynamics, USBE wanted to engage stakeholders to examine and recommend a redesigned school accountability system inclusive of the additional initiatives; be more comprehensive in its evaluation criteria; and support continuous school improvement in all schools.

This project was instituted to provide technical, practical and policy recommendations for an accountability system that can better attend to the holistic nature of learning and that supports real and sustained change through the use of a balanced and reciprocal accountability approach to support improvements in local educational systems.

COMMITTEE STRUCTURE AND MEETINGS

The Accountability Redesign Initiative employed a committee structure that recognizes the multiple responsibilities for school accountability in Utah. The Executive Committee was comprised of five members from the Utah Senate, four each from the Utah House, and State Board of Education, as well as four additional members representing several key political constituencies such as the Governor's office, the state school boards' association, and state superintendents' association. The Executive Committee met three times between November 12, 2021 and May 26, 2022 to help establish the "ground rules" for the overall system and to review the early work of the Advisory Committee. The 29 Advisory Committee members are school and LEA leaders, LEA assessment directors, teachers, and parents. The Advisory Committee is composed of members from the following stakeholder groups: Assessment Directors, Teachers, LEA Specialists (Growth, Special Education, DTL, ALS, Ed Tech), Executive Directors, Superintendents, Assistant Superintendents, Local Board, principals, and Parents.

The full Executive Committee was not able to meet during the fall of 2022 due to scheduling challenges. However, approximately half of the Executive Committee was able to convene and review this report on October 31, 2022. They did not think they should vote to accept or endorse the report without a quorum present, but one of the Committee co-chairs suggested that we note that the Executive Committee "received the report." All participating Executive Committee members agreed with that position.

The Advisory Committee met almost monthly from December 2021 through September 2022 and was responsible for creating a theory of action, design principles, selecting indicators, and creating the rules by which the system operates (e.g., how measures will be combined into indicators). Agendas and materials for all of the Executive and Advisory Committee meetings are available here and here.

THEORY OF ACTION

A theory of action is a critical tool when designing and evaluating a policy instrument. It can help illuminate alternatives and competing or contradictory claims about how a policy initiative should work. In the case of school accountability, policymakers and designers must very explicitly lay out what the proposed accountability indicators and design choices are intended to accomplish; in other words, *why* the accountability system is in place. In addition to the *why*, system designers and policymakers must also describe the *how*. For example, one might assert that holding schools accountable for increases in student test scores will lead to more focused instruction and ultimately improvements in student learning. But that is just an empty wish without specifying the processes and mechanisms necessary to bring about these learning gains, and the evidence that would be required to substantiate such claims.

Therefore, the Advisory Committee was charged with specifying the mechanisms by which these accountability uses will lead to the intended changes in teaching and learning. For example, one might postulate that incentivizing schools to begin incorporating performance-based assessments will help educators develop higher expectations for student learning. These higher expectations, in turn, will encourage deeper learning among students. Having to articulate both the aims and mechanisms of the

program in a theory of action will expose the weak points in proposed policies for evaluating schools, and shed light in fruitful ways to meet the major policy goals.

Theories of action are intimately linked to the purposes and uses of the accountability system. The system's purposes and uses of the accountability results should be aligned with its stated goals. The validity of the accountability system rides, in part, on how well its results drive intended improvements. Through this process—explicitly stating the crucial link between the purposes and uses of the accountability system, and how those processes will lead to what the accountability system is ultimately designed to achieve—theories of action can help us focus our designs on the right things and illuminate where we need to apply research-based approaches. By using this process, we gain another key benefit: seeing where a theory of action is falsifiable. The theory of action is not just a set of beliefs; it represents a series of hypotheses that should be based on research or previous practice. This explicit grounding is critical. When outlining the theory of action, the design team must ensure that connections among various aspects of the accountability system are not simply belief statements, but things that can be supported by research, ideally, or at least by best practice, if research is not available.

Overarching Vision

The Advisory Committee was committed to developing an accountability and reporting system that incentivized and supported schools in maximizing learning opportunities for students. Specifically, the Advisory Committee focused on learning opportunities tied to Utah's Portrait of a Graduate. The Portrait of a Graduate outlines a set of ambitious competencies for students grouped into three major categories: mastery, autonomy, and purpose. The Utah State Board of Education defines these three categories as follows:

- **Mastery** is the ability to demonstrate depth of knowledge and skill proficiency and includes the following characteristics:
  - Academic Mastery
  - Wellness
  - Civic, financial, and economic literacy
  - Digital literacy
- **Autonomy** is having the self-confidence and motivation to think and act independently. It is characterized by the following characteristics typically referred to as "21st Century Skills":
  - Communication
  - Critical thinking and problem solving
  - Creativity and innovation
  - Collaboration and teamwork
- **Purpose** guides life decisions, influences behavior, shapes goals, offers a sense of direction, and creates meaning. Purpose includes characteristics typically thought of as "21st Century" indicators including:
  - Honesty, integrity, and responsibility
  - Hard work and resilience
  - Lifelong learning and personal growth
  - Service
  - Respect

The Advisory Committee did not envision a system that held schools accountable for ensuring each learner achieves all of the Portrait of a Graduate competencies. Instead, it wanted to design a system that would incentivize and support schools as they worked toward deeper and more meaningful learning for all of Utah's students. The Committee recognized that there are multiple approaches that could help students attain Portrait of a Graduate competencies, but it noted that the state's own Personalized, Competency Based Learning (PCBL) framework offered a promising set of strategies. The Committee felt strongly that the current accountability system did not support, and even hindered, schools' efforts to implement PCBL systems to help students meet the knowledge, skills, and dispositions described in the Portrait of a Graduate. For that reason, the Advisory Committee focused, as much as possible, on designing an accountability system that supported the implementation of PCBL approaches and builds local capacity to create structures that help students meet Portrait of a Graduate competencies.

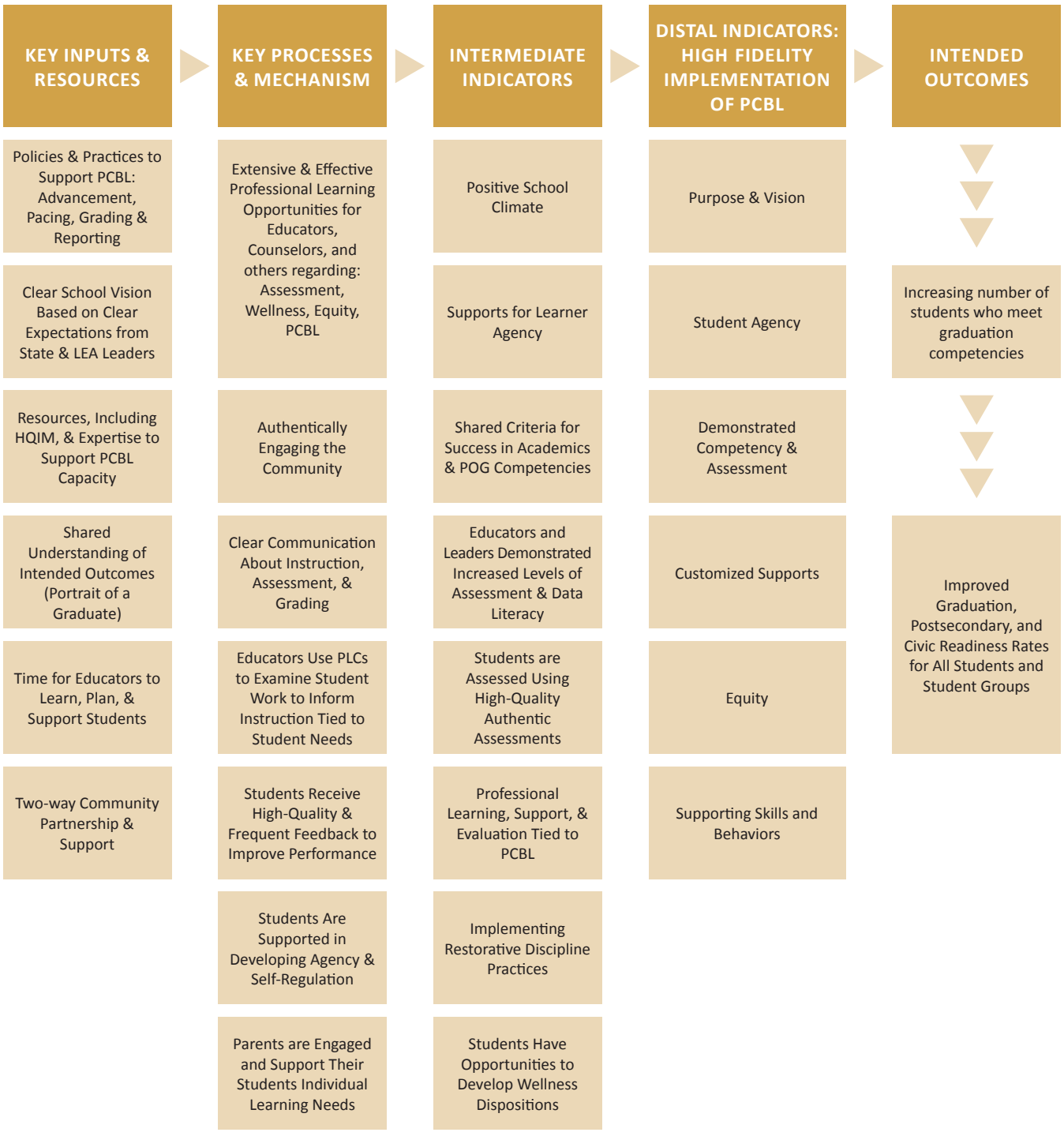
The Utah Accountability Theory of Action

The Advisory Committee started creating the theory of action depicted in Figure 1, below, by articulating the goals and long-term (distal) indicators of the proposed accountability system. The Committee worked through the various inputs and mechanisms necessary to increase the likelihood that the system would do what it wanted it to do.

Reading from left to right, the theory of action starts with the inputs and resources necessary to support the various processes and mechanisms that would lead to important conditions in schools that are referred to as intermediate indicators. The intermediate indicators represent features of schools that the Advisory Committee believes should be in place if schools are to fully support students in meeting the Portrait of a Graduate competencies. Following the logic of the theory of action, if the processes and mechanisms lead to the intermediate indicators, the distal indicators—which represent high-quality implementation of personalized and competency based education—should then lead to improved graduation, postsecondary, and civic-readiness[1] rates for all students and student groups. Critically, this theory of action serves as a guide to the design of the system, but as importantly, the theory of action serves as a framework for monitoring the effects of the system and supporting continuous improvement.

[1] Utah's Portrait of a Graduate Competencies document (2021) defines civic readiness as students being able to use "their knowledge of government and economic systems to defend civic choices and analyze and evaluate options" (p. 6).

Figure 1. Utah's Accountability Theory of Action



DESIGN PRINCIPLES

Stakeholders, policymakers, and technical leaders must make many decisions as they are developing an accountability system, and a well-designed theory of action can be their North Star. Likewise, having a well-articulated set of design principles can be an important touchstone as they choose the indicators and decision rules that will undergird the accountability system.

After the Center personnel introduced the concept of design principles to the Advisory Committee at the February meeting, the panel worked from a list of potential principles to produce a draft set of candidate design principles. Once that list was drafted, we asked Committee members to rank their 12 principles from highest to lowest priority. Although all their principles were important, we asked them to distinguish the "must-haves" from the "nice-to-haves" in their new system. After the prioritization exercise, the Advisory Committee identified equity, support and improvement, instructional core, and utility as its top-tier design principles. That said, the Committee made clear that the remaining eight principles were all important guideposts in designing the system.

1. **Equity:** The system has a clear focus on all students receiving the support and resources they need to learn and develop so they leave high school equipped to make productive life choices. Utah Code specifies that the educational system must provide opportunities for all students to learn, think, reason, and work effectively, both individually and in groups. Utah Code also requires that each student has a personalized education plan; that schools produce evidence of the degree to which all students, and identified student groups, are meeting the goals in their personalized education plans; and that schools monitor the needs of identified student groups as they work towards meeting competencies. The accountability system should promote understanding of the school/LEA conditions that support equity and excellence.

2. **Support and Improvement:** The system should be designed to support and improve schools' and educators' capacity to improve student outcomes, rather than focusing on punitive sanctions. Further, the system should promote a learning agenda that enables stakeholders at every level to innovate and strengthen PCBL designs and practices.

3. **Instructional Core:** An intense focus on student engagement, instructional quality, and meaningful content (and skills). This is a critical principle and is designed to challenge everyone to think hard about how best to honor these dynamics as they design a large-scale accountability system.

4. **Utility:** The system provides information to a variety of stakeholders in ways they can readily understand and can be used to improve student performance and school functioning.

5. **Measurable:** The indicators must rely on data that are observable and/or measurable at a specified level of comparability (e.g., within schools over time, across schools over time).

[2] Utah Code 53E-2-302

6. **Transparency:** The design of the system must be only as complicated as necessary to support the major goals and guiding principles. Even if it is internally complex, the workings of the accountability system should be externally transparent and understandable. The State must communicate the design and results of the system in ways that promote an accurate understanding for stakeholders.

7. **Coherence:** The accountability systems, particularly those at the school and LEA levels, must incentivize common and mutually supportive actions so that similar signals are sent to personnel and stakeholders at various levels of the system.

8. **Continuous Improvement:** The system is designed with clear and timely feedback loops and formative evaluation cycles to ensure that it continues to improve the quality and usefulness of the information provided to stakeholders.

9. **Shared Responsibility:** Improving educational opportunities in Utah is a shared responsibility among parents, students, educators, leaders, communities, and all policymakers. Therefore, the system should be designed to incorporate local expertise and capacity and should not serve only as a top-down state compliance mandate. Local context and expertise can provide an enhanced picture of school quality.

10. **Comprehensiveness:** Taken together, the indicators should support a robust understanding of system and school quality.

11. **Systematic:** The indicators reflect the interconnected nature of the organizational conditions that promote and sustain improvement and innovation.

12. **Research-based:** The indicators are grounded in a research-based theory improvement, and are coherently linked through a well-defined theory of action.

Some of the design principles, such as “research-based” and “measurable,” are useful for guiding the selection of specific indicators in the system. Others are useful in shaping the design of the full system, which includes not only which indicators are used, but how they are reported and used to make decisions. For example, the entire system should shed light on the degree to which students are provided equitable learning opportunities, and on its level of transparency and coherence. Collectively and individually, the design principles are intended to shape an accountability system that can support PCBL and student attainment of the Portrait of a Graduate competencies.

INDICATOR SELECTION

Introduction

Developing a theory of action and establishing design principles are key precursor steps to identifying indicators and eventually creating rules for how indicators are used to summarize school or LEA performance (e.g., decision rules). Before launching into the discussion of the process and the draft indicator selection, we spend a little time clarifying how we use the term "indicator" in this report.

Indicators are proxies for things we care about but have a hard time measuring directly. For example, postsecondary readiness is a popular indicator thought to provide information about students' likelihood of successfully transitioning from high school to college, career, military, training programs, or other options. Many factors relate to these sorts of transitions; some are measurable, and many are not. Therefore, postsecondary readiness indicators often include a variety of measures and other sources of information to serve as a broad-based proxy of students' readiness for this transition. States, for example, often include ACT or SAT test scores, certification exam results, course-taking patterns in high school, concurrent enrollment evidence, AP and IB results. State leaders recognize that none of these measures, on their own, are sufficient to provide stakeholders with a valid measurement, at the individual or aggregate levels, of readiness. Combining the various measures into an indicator, however, provides a more robust proxy for understanding individual and aggregate levels of readiness (i.e., at the school level) than would be the case for any single measure.

Indicator Selection Process

The Advisory Committee spent substantial time at a variety of meetings discussing and revising potential indicators. Rather than starting from scratch, the Committee worked from a small set of existing documents to inform its thinking. The National Academy of Science, Engineering, and Medicine (NASEM) conducted an extensive research effort into measures and indicators useful for monitoring and evaluating students' educational opportunities. The work resulted in a consensus report called *Monitoring Educational Equity* (NASEM, 2019)[3]. To the Academy's credit, they produced a follow-up report tailored to state and LEA leaders to support them as they worked to implement measures of educational opportunities and equity in their systems. This *Guidebook for State and District Leaders* (NASEM, 2020)[4] served as an important foundation for the Committee's work.

In addition to the Guidebook, Advisory Committee members relied on examples from New Zealand and the Massachusetts Consortium for Innovative Education Assessment (MCIEA) to help ground the work of establishing indicators. Importantly, Committee members relied on Utah's Portrait of a Graduate and Personalized, Competency Based Learning (PCBL) Framework as a guide to indicator selection.

[3] National Academies of Sciences, Engineering, and Medicine. 2019. *Monitoring Educational Equity*. Washington, DC: The National Academies Press. https://doi.org/10.17226/25389

[4] National Academies of Sciences, Engineering, and Medicine. 2019. *Monitoring Educational Equity.* Washington, DC: The National Academies Press. https://doi.org/10.17226/25389

Advisory Committee members worked through a series of exercises to prioritize potential indicators. They worked in groups to address the different levels of the school system—high school and elementary/middle school—because of the different expectations and potential indicators at the two different levels. We asked the Advisory Committee members to recommend which indicators should be common across the state (i.e., state-level indicators) and which should be considered for local use. This distinction is important for the developing system because the local indicators are designed to be more relevant and supportive for schools and LEAs while the statewide indicators provide policymakers with a valid way to compare schools and LEAs across the state.

During the indicator selection meetings, several Advisory Committee members suggested focusing on Portrait of a Graduate competencies as the targeted student outcomes for the system. Several of the competencies are difficult to measure, particularly on a large-scale basis. However, given the importance of all the competencies for creating well-rounded, life-long learners, the Committee suggested finding ways to support local efforts to instruct and assess all competencies in the Portrait of a Graduate, even if some are challenging to measure at the present time. Nevertheless, the Committee suggested that many Portrait of a Graduate competencies should be considered candidate indicators in a revised accountability system.

Additionally, the Advisory Committee used the theory of action and the PCBL framework to identify potential indicators for an accountability system focused on enabling factors such as school climate, learner agency, and accreditation status.

We discuss in the next section the indicators recommended by the Advisory Committee for both high school and middle/elementary school.

PROPOSED SYSTEM DESIGN

The proposed accountability system design includes both state-required and local indicators, as described below. The Advisory Committee recognized that despite its desire to create an accountability system ideally suited to support the PCBL framework and the Portrait of a Graduate competencies, many stakeholders still would like a system with all indicators validly comparable across schools. However, as the state and local communities continue to implement educational approaches to facilitate students' demonstration of the Portrait of a Graduate characteristics, we expect to see more shared understanding across the state of the meaning of these characteristics than is currently the case. As the state and local LEAs develop measures and tools to evaluate student achievement of the various competencies, we can work toward some degree of comparable expectations for all students.

Shifting to an innovative accountability system could raise substantial capacity issues at both the local and state levels. Therefore, the Committee envisions a system that can progressively address the goals of supporting PCBL and student learning of the Portrait of a Graduate as the state and local capacity for doing this work increases. In other words, the Advisory Committee recognized that many LEAs and schools would need time and support to shift their systems to support student learning of the Portrait

of a Graduate characteristics. Therefore, the Committee recommended phasing in the redesigned system while the state supports schools for which PCBL and Portrait of a Graduate is still relatively new.

As seen in the theory of action, the Committee discussed a wide range of factors contributing to PCBL implementation and supporting students' achievement of the Portrait of a Graduate characteristics. These include important inputs such as, "Clear School Vision Based on Clear Expectations from State & District Leaders" and processes such as "Parents are Engaged and Support Their Students Individual Learning Needs." As important as these precursor components of a theory of action are to the overall success of the initiative, the Committee felt strongly that the accountability indicators should be based on the intended ultimate outcomes as well as some of the intermediate and distal indicators.

We first discuss the proposed local indicators, both to signal the importance of these types of indicators in the next-generation accountability system, and because a similar framework is imagined for the high school and elementary/middle school systems.

Proposed Local Indicators for Both High Schools and Elementary/Middle Schools

The Advisory Committee recognized that if organizations are to improve, they must have some control over their goals, processes, and evaluations. Therefore, the state should not mandate which Portrait of a Graduate characteristics local communities decide to incorporate in the accountability system. That said, the Committee encouraged the state to provide guidance and technical support to help communities with data collection.

The Committee also recognized that all attributes of the Portrait of a Graduate are critical to learner success, but they also noted that some Portrait of a Graduate characteristics are easier to measure than others, at least at this time, and therefore, not all should be included in the state's accountability system. Collecting evidence of how schools are supporting students to achieve mastery of **all** Portrait of a Graduate aligned competencies would be overly burdensome and stress limited local capacity

The Advisory Committee wrestled with requiring certain, specific indicators versus letting local education leaders and stakeholders select from a wide range of choices that best fit their local contexts. After significant deliberation, the Advisory Committee recommended identifying a limited number of potential local indicators while still vesting considerable control to local education agencies to develop a process for evaluating success. They thought that a positive school climate was instrumental in fostering a culture of learning that would support PCBL implementation. Further, at the high school level, school climate information is derived from the accreditation review, so it does not require any extra work by LEA personnel.

Similarly, ensuring that each Utah student and educator has access to personalized teaching and learning experiences is one of the four goals the Board outlined in its most recent Strategic Plan. USBE has worked to create strategies for supporting this goal across the state. Further, such personalized experiences are important in facilitating student attainment of the Portrait of a Graduate competencies. Therefore, the Advisory Committee thought it was important to require all schools to submit local evidence showing how the school is supporting the development of learner agency.

Finally, since facilitating student attainment of the Portrait of a Graduate competencies is the primary intended outcome of the accountability system redesign, the Advisory Committee strongly recommended that all schools hold themselves accountable for supporting students in meeting these competencies. The Committee recognized, however, that holding schools accountable for meeting all of the outcomes defined by the Portrait of a Graduate would be both overwhelming and ineffective. Therefore, the Committee recommended requiring each school to submit evidence for how they are supporting students in meeting up to three Portrait of a Graduate competencies. Ideally, each school will submit evidence for three Portrait of a Graduate competencies. The Committee noted that more time might be needed before all schools can address three or more Portrait of a Graduate competencies, but this should be a long-term goal for the evolution of the accountability system. As we discuss later in this report, specifics of implementation should be guided by an ongoing advisory committee.

1. **School Climate:** The Advisory Committee strongly favors including school climate as a local indicator because of the important role that a positive school climate plays in supporting PCBL implementation and attaining high levels of student achievement. The Committee noted that several dimensions of the accreditation process were related to the climate of the school and recommended that the *Culture of Learning* dimension (and perhaps others) of the accreditation reports be used as the school climate indicator for high schools. The Committee was aware that accreditation occurs once every five years and only for high schools, but thought it was still appropriate to use that information as the school climate indicator since climate does not change very quickly. Further, if the evaluation of school climate includes surveys of parents and perhaps community members, there can be a diminishing return when trying to survey the same people every year. The indicator score will simply remain the same for five years. However, if a school (or LEA) believes that the climate is rapidly improving due to new initiatives, the Committee supported having schools substitute (or supplement) a different research-based climate instrument in place of (or in addition to) the information derived from the accreditation data to update the school's indicator score. Therefore, the Committee recommended that USBE continue to support locals with the development of high-quality data collection instruments for school climate.

   The Advisory Committee recognized that elementary and middle schools do not have the advantage of relying on the school accreditation process to provide school climate information. Nevertheless, the committee thought creating an effective school climate is critical to facilitating students' capacity to meet Portrait of a Graduate competencies and, as noted below, the Committee recommends having USBE support the development and use of high-quality school climate tools and processes.

2. **Supporting Learner Agency:** Some Advisory Committee members suggested having LEAs submit evidence that they are supporting the development of learner agency by providing customized supports to all learners. Similar to the climate indicator, the Committee recognized that certain dimensions of the accreditation evaluation for high schools would apply to supporting learner agency, particularly the *Leadership for Learning and Engagement of Learning* dimensions. Supporting learner agency and school climate are two important intermediate indicators in the theory of action, so the Committee thought it was important to require all schools to gather data on the degree to which they are supporting students in developing the ability to guide and monitor their own learning.

Again, the Advisory Committee recognizes that elementary and middle schools will need additional support to gather and use data related to learner agency, but thought that this indicator was very important for supporting PCBL implementation and wanted it included in the system. For that reason, the Committee recommended that USBE support the development and use of high-quality learner agency tools and processes.

3. **Portrait of a Graduate:** The Advisory Committee felt strongly that LEAs should choose between one and three Portrait of Graduate characteristics as part of their local indicator system. We note that "LEAs" are the locus of control here since the Committee believed that such decisions should not be left to every school but would need to support of LEA leaders to make such decisions. As discussed above, Utah's Portrait of a Graduate describes 13 characteristics that Utah graduates should possess. The state convened educators to create a set of learning expectations across the K-16 spectrum for each of these characteristics to help communities clearly identify student mastery. These 13 characteristics are grouped into three categories: mastery, autonomy, and purpose. The Committee debated whether to require schools to select at least one characteristic from each of the three categories. The Advisory Committee members thought this would be an important way to structure the local indicator system to strengthen the implementation of PCBL and Portrait of a Graduate strategies. However, given the current stage of statewide implementation of PCBL and Portrait of a Graduate, the Committee thought a phased-in approach with fewer initial requirements would be prudent.

The Advisory Committee clearly supports the use of local indicators in the accountability system. But it also recognizes that it would be challenging for many of Utah's LEAs and schools to engage in this work meaningfully without considerable state support and guidance.

Such support would include the development of tools and processes for collecting high-quality data on these types of local indicators. Relying on local indicators provides important contextual information that will likely best support the high-fidelity implementation of PCBL, but that means that comparability across schools and LEAs will be compromised. One way to facilitate some level of comparability is for the state and/or a consortium of LEAs to produce general performance level descriptors (PLDs) for potential local indicators. Such PLDs could be similar to a generalized rubric or scoring guide for performance tasks. In fact, USBE and LEA partners have already produced the Utah Portrait of a Graduate Competencies, which includes brief descriptions of competent performance for each of the Portrait of a Graduate characteristics across the K-12 continuum. This document should be the starting point for subsequent work in this area. While such PLDs can guide the development of a local scoring system, they are not specific enough to guide the scoring of particular local tasks or other forms of evidence (e.g., surveys). However, common general rubrics and PLDs can help clarify and communicate expectations about expected levels of student/school performance and may help support comparability evaluations.

High School System

Proposed Statewide Indicators

The high school system should include the following indicators that would be common across all high schools in the state.

1. Academic mastery
    a. Academic achievement as measured by the state assessment system
    b. Academic growth for assessment with consecutive years of assessment
2. Postsecondary readiness
    a. College, career, and civic readiness
    b. Graduation rate
    c. Other potential measures as determined, given the need to re-consider and perhaps redesign this indicator
3. English language proficiency and progress
4. Leadership for Learning which includes indicators related to school climate and learner agency and will be drawn from the school accreditation process.

We grouped these indicators in four main buckets, but all of the indicators except "leadership for learning" are found in the current state accountability system.

This indicator grew out of a recognition of the value of the school accreditation indicators, process, and results, particularly in terms of gaining an understanding of school quality beyond typically used accountability indicators. USBE currently contracts with Cognia for school accreditation based on Cognia's Performance Standards for School Accreditation. The Committee thought that the current approach represented important processes and outcomes that would be hard to measure without an on-site accreditation visit. That said, panelists thought the current approach and processes are more important than a particular company that supports accreditation, in this case, Cognia. For the purposes of this report, we rely on the current accreditation process that focuses on four key characteristics of schools:

- **Culture of Learning:** The institution's focus on the challenges, joys, and opportunities of learning, and the coherence with its mission and vision
- **Leadership for Learning:** The responsibility of an institution's leaders to influence and impact all aspects of the institution in positive ways
- **Engagement of Learning:** The inclusion of all learners in the learning process, and their development of confidence and love of learning
- **Growth in Learning:** The growth of learners in the programs and curricula provided by the institution and their readiness to successfully transition to the next levels of learning.

While on-site visits occur once every five years or so, a school's accreditation status can change during that time span as it addresses shortcomings found during the initial visit. The advantage of including accreditation status is that it allows consideration of hard-to-measure indicators in ways that capitalize on existing systems and knowledge.

The Advisory Committee thought it was important to rely on more than simple pass/fail designations to report on accreditation. Instead, it recommended using either the scale scores or the performance

levels produced in the accreditation process to provide finer-grained information to users and stakeholders. The Advisory Committee recommended having USBE work closely with Cognia and LEA representatives to work out the details of how best to include accreditation as part of the overall evaluation of school quality.

Elementary/Middle School System

Proposed Statewide Indicators

The elementary school system should include the following indicators that would be common, also, across all schools with grades 3-8 in the state.

1. Academic mastery
    a. Academic achievement as measured by the state assessment system
    b. Academic growth on assessments across consecutive years
2. Targeted Growth—defined as the growth of the lowest performing students in the school
3. English language proficiency and progress.

The three sets of indicators are in the current system and have generally performed well. Stakeholders value the academic growth of students from year to year, and users of the current system appreciate the way that the equity indicator rewards schools for accelerating the growth of the school's lowest-performing 25% of students. Progress towards English language proficiency is a required indicator under the Every Student Succeeds Act and also provides important equity information.

AGGREGATION AND DETERMINATIONS

Having a set of indicators that signal what the state values is critical to accountability system design. The next step is to determine which schools need additional support so that all students have appropriate educational opportunities. Accountability systems do not need to produce a total score in order to identify which schools need support.

This is a point worth highlighting. Many states compute a total accountability score and convert these scores into performance levels and/or grades, but a significant number of states have been permitted to use the type of profile approach we propose below. The Advisory Committee argues that total scores could obscure important details about the quality of the school.

The Advisory Committee recommends using a "dashboard" or "profile" approach for displaying the results, like the two examples below (see Figures 2 and 3). The advantage of these options is the transparency that comes with prominently displaying every indicator rating, rather than obscuring such information in a total score and/or school grade. Many are familiar with the Consumer Reports rating scheme that offers a wealth of information about various products. For example, when evaluating automobiles, Consumer Reports generally includes information about predicted reliability and satisfaction, road test results, mileage, acceleration, braking distance, routine handling, emergency handling, and noise. While Consumer Reports produces a type of total score (e.g., "best buy"), they do

not feature in the same ways as these distinct indicator scores. Someone who's interested in acceleration and emergency handling is likely to focus on different indicators than someone who's interested in reliability and mileage. The advantage of the profile approach is that it allows each user to tailor the report to their preferences, while making all indicator ratings fully visible, not obscured by a complex score calculation.

Indicator Ratings

While the dashboard or profile approach does not rely on a total score to provide information to stakeholders, such an approach must have a clear and consistent way to evaluate each school's performance on each reported indicator. Typically, states report indicators using a 3, 4, or 5-point scale (or shaded parts of a circle, for Consumer Reports). The Advisory Committee recommended using a 4-point scale for each state and local indicator.

Such a rating system works well for common indicators collected at the state level. Level 3, for example, should mean the same thing from one school to another. While this approach can be used for local indicators, it will be a challenge, even when using common performance level descriptors or a general rubric (described above), to produce scores that can be validly compared across schools. The Advisory Committee understands this tradeoff and made clear that the advantages of having local indicators for supporting Portrait of a Graduate and PCBL implementation was worth giving up some cross-school comparability.

If the goal is to support Portrait of a Graduate and PCBL implementation, schools and LEAs need to be able to monitor their own progress on these local indicators over time. There are many well-known tools and processes used for scoring essays and performance tasks that can be applied to help ensure within-school or within-LEA consistency over time. Once schools are able to achieve some level of internal consistency, USBE and its advisors (e.g., the Assessment and Accountability Policy Advisory Committee) can create systems to build a degree of cross-school comparability into the system. *Note: This is not a required evolution; it will depend on the degree to which comparability and contextual flexibility are valued.*

Figure 2. Example of a High School Indicator Profile Report

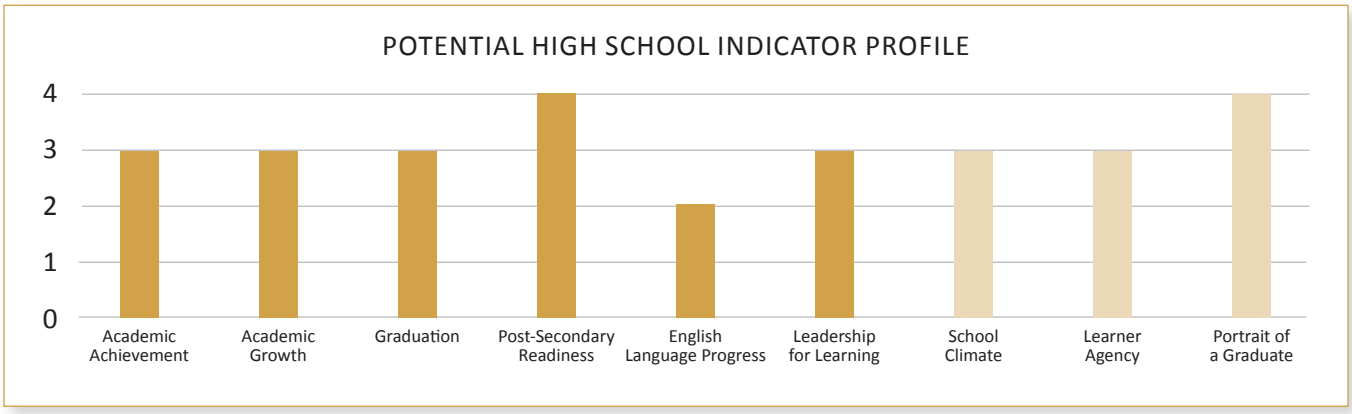
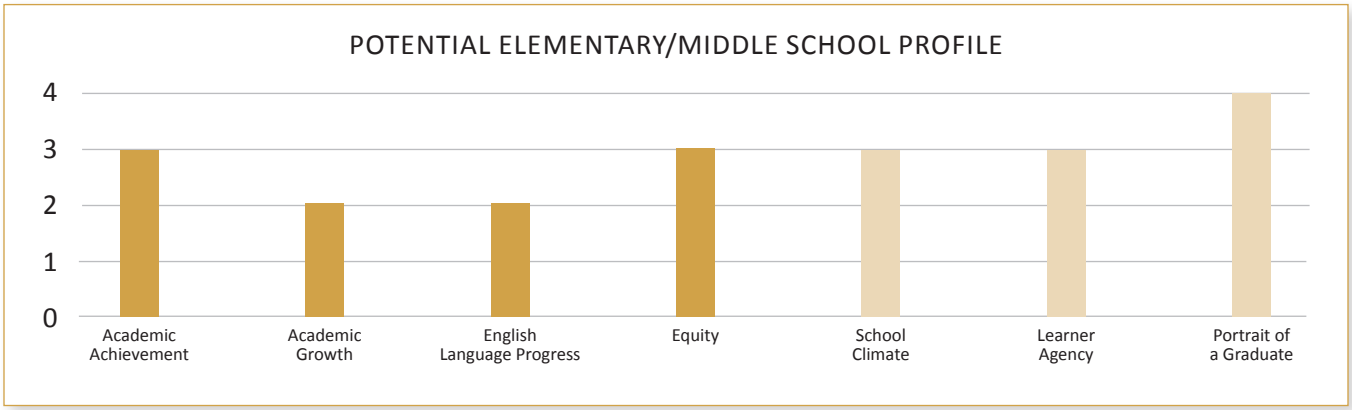


Figure 2. Example of an Elementary/Middle School Indicator Profile Report



Meeting Federal Designation Requirements

There is solid evidence that a profile/dashboard approach meets the requirements of the federal education law (ESSA) because it has already been approved for use in several states to identify the lowest 5% of Title I schools for Comprehensive Support and Improvement (CSI), as well as applying state-specific rules for identifying schools for Targeted Support and Improvement (TSI) and Additional Targeted Support and Improvement (ATSI).

The Step Approach to Identification

The procedure for identifying schools for the various levels of support required under federal law follows what has been termed a "step approach." This approach begins by identifying the scores/ratings on each of the indicators that would trigger an identification. States often do this by working with an advisory committee (e.g., AAPAC). The simplest case, and the easiest one on which to get agreement, is that schools scoring at Level 1 on all indicators are clearly in need of additional support (see Table 1 below). Using the step approach depicted in the table above, such schools would be identified for CSI on Step 1. If 5% of the Title I schools were identified on Step 1, no further steps are necessary. If the 5% threshold was not reached, we would move to Step 2. This second step would identify more schools than Step 1, by definition, and the state office would then determine if the 5% target was met after Step 2. Note that the 5% threshold is the federal requirement; states can choose to identify more, but not less than 5% of the Title I schools for CSI. If the 5% target was not reached after Step 2, the state would continue with Step 3, and so on, until the 5% threshold was reached. A similar approach, depending on the state's rules, is used for TSI and ATSI.

Note that the steps following Step 1 show Level 2 scores for certain indicators in order to include more low-performing schools in the designated level of support. For example, Step 2 indicates that schools scoring Level 1 on all common/state indicators and scoring at Level 1 or Level 2 on the local indicators would be included in designations for additional support. However, keep in mind that this is simply an example. We could have selected any other indicators for this example. The important point is that the steps and indicator values like those shown in Table 1 must be determined by a deliberative process using a trusted advisory group and then evaluated empirically to answer questions such as the number and types of schools identified on each step. The beauty of such an approach is in its explicit and simple transparency. Once a school knows its indicator scores, it can easily determine why and if the state will designate it for additional support.

TABLE 1. EXAMPLE OF A STEP APPROACH TO IDENTIFY SCHOOLS FOR ADDITIONAL SUPPORT FOR ELEMENTARY/MIDDLE SCHOOLS

	INDICATOR PERFORMANCE LEVELS						
Steps	Academic Achievement	Academic Growth	ELP	Equity	School Climate	Learner Agency	Portrait of a Graduate
Step 1	1	1	1	1	1	1	1
Step 2	1	1	1	1	2	2	2
Step 3	1	1	2	1	2	2	2
Step 4	1	1	2	2	2	2	2
Step 5	2	1	2	2	2	2	2
Step 6	2	2	2	2	2	2	2

IMPLEMENTATION CONSIDERATIONS

The Advisory Committee recognizes that it is proposing an ambitious revision to Utah's current accountability system. Further, the Committee acknowledges that the work around the Portrait of a Graduate and the PBCL Framework is quite variable across the state. Some schools and LEAs have been engaged in these practices for several years, while others are still quite new to the concepts, structures, and culture associated with these more student-centered practices.

Therefore, the Advisory Committee spent time discussing key implementation factors for the revised accountability system. The best design, if poorly implemented, can still yield a bad result. In the discussion that follows, we present considerations and recommendations for how the revised system might be implemented. We first discuss state-level implementation considerations, and then LEA and school implementation considerations.

State-level implementation considerations

The Advisory Committee identified several prominent issues that must be addressed when implementing a revised accountability system. While the Committee discussed a broad range of potential implementation issues, they emphasized the following:

- USBE capacity requirements
  - Internal USBE coordination
  - Reviewing and supporting school indicator selection
  - Supporting approaches to measuring local indicators
- Data systems and data quality
  - Designing data collection mechanisms for local indicators
  - Supporting local educators with data submission and quality control

USBE Capacity Requirements

The Advisory Committee emphasized that for a reform of this breadth to work, many offices within USBE will need to work together to support LEA and school efforts. Supporting schools in implementing PCBL learning systems in order to enable students to meet the Portrait of a Graduate competencies resides in more than the assessment and accountability offices. USBE has already been coordinating across offices to support PCBL, but this must become institutionalized as the state implements a reformed accountability system.

The Advisory Committee stressed the importance of USBE playing a leadership, yet supportive, role in ensuring that the local indicator system is both high-quality and useful to schools for improving their practice. First, the Advisory wanted USBE (and perhaps the legislature) to clarify which policy body has the authority and responsibility for reviewing and approving local indicator selection. That said, the Committee assumed the state board would have this authority.

The Advisory Committee wanted USBE to create tools and templates to help LEAs select and measure local indicators. They felt that without such tools, many of the smaller and/or less-resourced schools and LEAs would struggle to understand the expectations and create high-quality local indicators. Further, the Committee wanted USBE to support the development of performance level descriptors (PLDs) or generic scoring rubrics for the classes of local indicators to help clarify expectations for performance on uncommon indicators and work to create a shared understanding of excellence across the state. These model PLDs must be general enough to allow for local flexibility and autonomy yet defined enough to allow for at least some degree of comparability.

USBE currently employs many professionals across units capable of leading such work. However, all have full-time positions with varying degrees of overlap with the work called for above. Therefore, in order to fully support LEAs and USBE in addressing the leadership and capacity recommendations outlined in this report, USBE will likely need an additional 1-4 FTE, depending on if personnel are assigned to meet the needs of the innovative accountability system.

Data Systems and Data Quality

The main focus of the discussion around data systems and data quality centered on how the state and LEAs can best work together to make data collection and transfer as efficient as possible. The Advisory Committee recommended that USBE lead these efforts because there is no straightforward way for the LEAs to coordinate this effort among themselves.

These recommendations included things like collecting data from other entities, such as Cognia for accreditation data, to avoid having LEA personnel having to transfer data between Cognia and USBE, or worse, having LEA personnel having to hand-enter data that could have been easily transferred electronically. Further, the Committee recommended having USBE create clear guidelines for data collection, transmission, and storage, particularly in terms of specifications around granularity. For example, LEA leaders will need to know whether to maintain records at the individual item response level or individual student level. Finally, the Advisory Committee strongly recommended capitalizing on existing data collection systems already without having to create new and separate systems unless absolutely necessary.

LEA and School Implementation Considerations

As important as the state implementation considerations are, the needs of local education agencies might be even more substantial given the expectations for local educators to ensure that students have opportunities to meet the Portrait of a Graduate and to document these efforts via the use of local indicators. In the discussion of local implementation considerations, the Advisory Committee focused on:

- Capacity needs
- Professional learning
- Financial needs
- Ongoing advice

Capacity Needs

The Advisory Committee elaborated on several of the recommendations provided above under the section for state-level recommendations. The Committee stressed that local educators would value a resource bank, curated by USBE and LEA-level collaborators, with high-quality assessments for various Portrait of a Graduate competencies and instruments that can be used to measure and support important components of PCBL implementation (e.g., school climate, learner agency). The assessments and instruments used to populate the bank can be created by teams of local and state experts but should also be curated from LEAs that are well along the way to PBCL implementation.

The Committee also recommended having USBE, in collaboration with local LEAs, provide guidance for operationally defining the various competencies so they can be assessed. This should be part of an overall resource bank. In other words, it is critical that the curators of any such bank first clearly define the competencies and the constructs (e.g., school climate) to which the multiple assessments and instruments are aligned. In addition to being good measurement practice, this helps communicate to users that knowledge and skills expected to be developed among students and school personnel.

Finally, the Committee strongly recommended that for certain indicators, particularly school climate, there would be a considerable advantage to have a very limited number of high-quality tools and processes. Committee members hoped the state could arrive at a school climate survey that could garner widespread agreement and use. Having LEAs and schools continue to develop their own instruments is a drain on local capacity and is inefficient.

Professional Learning

The Advisory Committee engaged in considerable discussion regarding the professional learning needs associated with the knowledge, skills, and dispositions necessary to create the school structures, supports, and expertise necessary implement PCBL systems and enable students legitimate opportunities to demonstrate achievement of the Portrait of a Graduate competencies.

The Committee stressed that such professional learning required a multi-level and multi-year effort. For example, several Committee members noted that local boards of education, in addition to leaders and educators, must be offered professional learning opportunities regarding the rationale behind the Portrait of a Graduate and PCBL approaches as well as the policies and leadership requirements necessary to advance these learning goals in their LEAs.

The Committee stressed the importance of regular and ongoing professional learning opportunities for LEA and school leaders, but especially for teachers so they have the opportunities to develop the knowledge and skills necessary for implementing student-centered learning systems to ensure that all students can meet the challenging Portrait of a Graduate competencies.

Determining whether students have or have not met the Portrait of a Graduate competencies is ultimately a measurement issue. Even educators and leaders with strong classroom assessment skills will need considerable support to learn how to validly measure hard-to-assess competencies such as those that comprise Utah's Portrait of a Graduate. For example, knowing how much and what type of evidence is sufficient to declare a student competent can challenging even for educators with good assessment backgrounds. Thus, improving the assessment literacy knowledge and skills of educators and leaders will be a significant undertaking requiring creating sustainable structures for supporting educators' long-term assessment literacy needs.

The Committee also noted that schools will likely need to shift typical grading practices and policies to better align with the types of the culture of a school engaged in deeper learning approaches such as PCBL. Changing grading systems, especially at the high school level, is not for the faint of heart and will require the full involvement and support from the local board of education. Therefore, the Committee recognized that this is a long-term effort and rushing the transition of the grading system could cause significant backlash among parents and community members.

The types of professional learning described above are focused on what is necessary for educators and leaders to implement personalized and competency-based learner strategies to help students meet the Portrait of a Graduate competencies. Such skills are critical to the success of this initiative. The Advisory Committee recommended that USBE clarify the expected knowledge and skills necessary for educators and leaders to be considered assessment literate. Rather than starting from scratch, the Committee recommended starting from existing standards such as those produced by the Michigan Assessment Consortium or by the University of Colorado Boulder. To that end, USBE is releasing a series of assessment literacy professional learning modules this fall, utilizing the resources of the Michigan Assessment Consortium as well as the Center for Assessment.

The Advisory Committee's main focus in this report, however, is on offering recommendations for a revised accountability system than can incentivize and support deeper learning. The system proposed in this reports calls for LEA and school leaders to propose, measure, and evaluate students' and schools' progress in meeting important indicators related to PCBL implementation and meeting Portrait of a Graduate competencies. The sorts of skills necessary for education leaders to effectively identify and evaluate local accountability indicators generally fall more under the heading of data and evaluation literacy. For these domains, the Program Evaluation Standards authored by the Joint Committee on Standards for Educational Evaluation will provide guidance for the professional learning necessary to help school and LEA leaders develop the knowledge and skills necessary for supporting the creation and high-fidelity use of local accountability indicators.

Finally and despite the extensive set of professional learning needs outlined here, the Advisory Committee cautioned about trying to go too fast and overwhelm local leaders and educators. They noted that educators will need sufficient time to help shape and implement these new strategies and

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those responsible for overseeing this new system must recognize that this new accountability system is not the only mandate or initiative coming from the state.

Financial Needs
The Advisory Committee did not offer many specific recommendations regarding the financial needs of LEAs when it comes to supporting the educational shifts necessary to implement deeper learning systems and document these efforts through the design and implementation of local accountability indicator systems. The Committee did note that they did not think there would be much of an appetite for spending on a school accountability system, but there very well could and should be support for schools and LEAs to facilitate student learning of the Portrait of a Graduate competencies.

Ongoing Advising
The Advisory Committee strongly recommended that they, or a group like them, be empaneled throughout the initial implementation years (and likely beyond) to provide advice to USBE and its partners regarding the implementation process. There are many decisions and recommendations that cannot be made until after legislation and regulations are finalized and the system is piloted. Therefore, the Committee recommended either expanding the existing USBE Assessment and Accountability Policy Advisory Committee (AAPAC) to include more members of this current Advisory Committee, perhaps creating a subcommittee of AAPAC to focus on the implementation of the revised accountability system, or creating an entirely new committee charged to provide advice regarding the revised accountability system.

School LAND Trust Program
The School LAND Trust program brings tens of millions of dollars annually to meet critical academic needs and enhance and improve academic excellence in Utah public schools. The funds are generated from the earnings on the permanent State School Fund, where revenue from school trust lands is invested. The funds are discretionary for academic instruction and play a vital role in student success.

Each LEA school in Utah elects a School Community Council (SCC) consisting of parents, teachers, and the principal. Charter Schools have Trust Lands Councils. All councils must have a two-parent member majority.

Each council identifies the focus of the School LAND Trust plan by carefully reviewing school-wide assessment data annually. Plans are developed to improve student academic performance in the identified areas with the annual School LAND Trust program funds. The plans are approved by the council, submitted electronically, and approved by the local school board or chartering entity. For more information about the program, see this website.

The Advisory Committee spent time at several meetings discussing the School LAND Trust and how the program could provide a structure for the development and implementation of the local indicator system. There was some concern that bringing a highly successful program into an accountability framework, but in the end, the Committee thought the LAND Trust program offered a powerful structure and considerable efficiencies for local schools and LEAs.

In particular, the Committee felt that the School Community Council (SCC), which consists of parents, teachers, and the principal, can facilitate the type of broad-based involvement in the selection and implementation of local indicators the Advisory Committee envisioned. Committee members reported that community councils offered a forum for parents and educators to have meaningful discussions and take necessary action regarding student competencies. Committee members noted an opportunity for connecting the LAND Trust goals to proposed school-level indicators in the accountability system to further empower community councils by representing them in both processes. On the other hand, Committee members indicated that Community Councils will need training and guidance for selecting indicators that could be meaningfully incorporated into the school accountability system.

POLICY RECOMMENDATIONS

Accountability

Indicators

Adoption of the Advisory Committee's recommended indicators for the state's elementary, middle, and high school indicators would require legislative amendments to sections 53E-5-205 and 53-E-206 of the state code. Specific amendments would be needed to address the following:

- Including accreditation status as an additional high school indicator
- Considering revising the postsecondary readiness indicator to explore improvements to the college, career, and civic readiness indicator. Committee members expressed interest in integrating opportunities for students to pursue personalized and competency-based pathways aligned to state competencies, for example.
- Adding a requirement for all LEAs to identify and report on a set of local indicators aligned to the state's Portrait of a Graduate and PCBL Framework. This is in contrast to current law, which permits a school to choose two self-reported indicators for inclusion on a local report card pending state board approval, but these indicators do not "count" in the accountability system.

School Performance Levels

Section 53E-5-204 of the state code on school rankings would need to be amended if the Advisory Committee's recommendation to replace overall school performance levels–or letter grades–with a dashboard is adopted. This change would require amendments to Utah Code, which currently requires the state board to assign an A-F letter grade to each school in the state. Utah's State Board would also need to revise state regulation R277-497-2 which details the performance thresholds for each letter grade. The legislature would need to replace the existing language with text directing the State Board to create a dashboard for each school that will detail performance on each of the indicators in the state's accountability system.

Calculation of Points

The adoption of a dashboard approach would also require a new approach for aggregating school determinations. Policymakers would need to strike the current language in section 53E-5-207 of Utah's state code that assigns a total number of points a school can receive for each indicator in the state's accountability system to determine the annual letter grade. Additionally, the state board would need to

strike language in R277-497-3 which describes the process for calculating points for the academic growth indicator, and relevant language in R277-497-4 detailing specific provisions for the calculation of points. New language for school identification can be found below in the school improvement section.

Reporting
The legislature and state board will need to mirror these changes in the state's reporting requirements for schools specified in 53E-5-211 of Utah's state code and state board regulation R277-497-4. Specifically, the language in 53E-5-211 directing the state board to publish an annual report card for each school on its website featuring an overall grade will need to be replaced with language directing the state board to publish an annual dashboard for each school providing performance information on each of the state's accountability indicators. The report card should provide clear and transparent information about each school's strengths and areas where growth is needed.

Additionally, the language in 53E-211 permitting a school to include up to two self-reported school quality indicators on its school report card would need to be updated to make clear that each school must select and report data on the local indicators aligned to the state's Profile of a Graduate and PCBL Framework as specified by the State Board in the process outlined above in the indicators recommendations. The language in the accompanying State Board regulation R277-497-4, specifically 3(a) through (d), detailing the State Board's responsibilities for approving and incorporating local indicators into the school report cards, would also need to be revised to align with the proposed process above.

School Improvement

Definitions for School Improvement and School Identification
As discussed above, the adoption of a dashboard approach to communicate school performance will require Utah policymakers to direct the state office to develop a new method for identifying schools for additional support. The Advisory Committee recommends using the "step approach" described above. The step approach has already been shown to satisfy federal requirements for identifying Comprehensive Support and Improvement (CSI), Targeted Support and Improvement (TSI), and Additional Targeted Support and Improvement (ATSI) schools. Amendments needed include the removal of the definition for "school grade" in section 53E-5-301 of state code, as well as the definitions for "baseline performance," "eligible school," and "low performing school" in state board regulation R277-920. Each of these definitions currently references the calculation of points for identification. A new policy would need to be developed describing the decision rules (e.g., the step approach) the state board would apply to the dashboard to identify the appropriate number of schools for each category.

As policymakers consider this recommendation, they may want to study dashboard approaches used in New York, New Hampshire, and California.

Needs Assessment for Springboard and Elevate Schools
Given the Advisory Committee's interest in elevating the role of the accreditation process to the state's accountability system, policymakers may want to explore closer alignment to the needs assessment processes for Springboard and Elevate schools detailed in sections 53E-5-302 and 53E-5-2.1 of Utah's code. Committee members felt strongly that schools are already collecting and reporting a lot of data

aimed at school improvement, and it recommended streamlining this for all schools, but especially those being asked to undergo more intensive interventions. Policymakers should consider ways to integrate data from the accreditation process into the current needs assessment for high schools, at least, so school personnel can focus on one, clear source of data for improvement.

Exit Criteria

The adoption of a dashboard approach in lieu of overall letter grades will also require further revision to the state's exit criteria for Springboard Schools. Current state board regulation R277-920 specifies that schools may exit improvement status by closing the gap of 1/3rd toward a B letter grade. The state board will need to develop different criteria tied to the decision rules developed for the dashboard. Again, this has been done successfully in many states and Utah can easily rely on these examples. The state board would not need further revisions to the exit criteria for Elevate schools as that was recently updated to state that a school exits after four years participating in a continuous improvement cycle.

SUMMARY AND DISCUSSION

The report presents recommendations for the redesign of Utah's School Accountability System. The overarching goal of the redesign process was to create a system that supports schools in implementing a Personalized and Competency Based learning system and facilitating student achievement of the knowledge, skills, and dispositions represented by Utah's Portrait of a Graduate. Another key goal was to make the system as simple and transparent as possible while recognizing that evaluating school quality is a complex endeavor.

The Advisory Committee engaged in almost a year-long deliberative process working through the development of a detailed theory of action, articulating clear principles to guide the selection of indicators and the system design, and offering policy recommendations to support the proposed system design.

The Advisory Committee struggled with the tension of creating a system that fosters local autonomy to best support students' capacity to meet Portrait of a Graduate competencies by the time they graduate from high school with the familiarity of a system based on common measures and indicators across the state. The Committee recognized that while common statewide indicators facilitate comparisons across schools and LEAs, they are, essentially by definition, less relevant to each local context. Indicators tied to the needs of each local community can best support improvement, but then they make it more challenging to determine if schools are meeting common thresholds.

We believe this report threads this needle as well as possible. The Advisory Committee is recommending a system with an appropriate mix of both statewide and locally selected indicators according to a common framework. The Advisory Committee recognized that including local indicators, especially those based on the Portrait of a Graduate characteristics, will require additional capacity at both the local and state levels. To that end, the Advisory Committee recommends utilizing existing structures such as the high school accreditation system and the School LAND Trust program to support efficiencies wherever possible.

The Advisory Committee also recognizes that this report represents a work in progress. The Committee recognizes that the Utah Legislature and the Utah State Board of Education make the ultimate determinations about school accountability in Utah. The Committee urges these two bodies to recognize the intense work and deliberations contained in this report and the grounded wisdom of those closest to the work of school improvement.

Finally, even if the report and proposed system is adopted as presented in this report, the Advisory Committee knows that many decisions will need to made in the context of implementation. Therefore, the Committee strongly recommended that an advisory committee, like the current Committee, be empaneled to support USBE as it works with LEAs to implement a next-generation accountability system in support of deeper learning in Utah.

APPENDIX A: COMMITTEE MEMBERSHIP

Utah Accountability Redesign Advisory Committee Members

NAME	AFFILIATION
Brook Anderson	Jordan
Michelle Bagley	Alpine
James Baliff	Granite
Michael Clark	Summit Academy
Brent Coffman	Nebo
Travis Cook	Provo
Royd Darrington	Juab
Steven Davis	NUAMES
Michelle Eldredge	Provo
Timothy Gadsen	Salt Lake City
Jennifer Heaton	Charter
Sheri Heiter	Weber
Cory Henwood	Iron County
Beverly Herrmann	Canyons

NAME	AFFILIATION
John Hughes	Emery
Aaron Jarnagin	Tooele
Sarah Jones	UEA
Jeff Lutz	Salt Lake City
Adam McMickell	Ogden
Lauren Merkley	Granite
Rich Nye	Granite
Hal Sanderson	Canyons
Kim Schaefer	San Juan
Amber Shill	Canyons
Frank Schofield	Logan
Selena Terry	Sevier
Logan Toone	Davis
McKell Withers	ULEAD Director
LeAnn Wood	PTA

USBE Ex-Officio Advisory Committee Members

Sydnee Dickson, Utah State Superintendent of Public Instruction
Darin Nielsen, Assistant Superintendent, Student Learning
Sarah Young, Chief of Staff
Patty Norman, Deputy Superintendent of Student Achievement
Ann-Michelle Neal, Accountability Specialist
Tracy Vandeventer, Director of the Center for Continuous School Improvement

Center for Assessment and KnowledgeWorks Facilitators and Report Writers

Scott Marion, Executive Director, Center for Assessment
Lillian Pace, Vice-President of Policy and Advocacy
Julianna Charles Brown, Director of Systems Transformation
Leslie Keng, Senior Associate, Center for Assessment

*Utah Accountability Redesign Executive Committee Members**

NAME	AFFILIATION	TITLE
Stuart Adams	Senate	President of the Senate
Ann Millner	Senate	Majority Whip
Lincoln Fillmore	Senate	Senator
John Johnson	Senate	Senator
Kathleen Riebe	Senate	Senator
Mark Huntsman	USBE	USBE Board Chair
Molly Hart	USBE	USBE Board Member
Stacey Hutchings	USBE	USBE Board Member
Carol Lear	USBE	USBE Board Member
Lexi Cunningham	USSA/USBA	USSA Executive Director
McKay Jensen	USBA	USBA Past President
Cindy Phillips	SCSB	SCSB Board Member
Jefferson Moss	House	Executive Appropriations Vice - Chair
Brad Last	House	Executive Appropriations Chair
Lowry Snow	House	Representative
Susan Pulsipher	House	Representative
Brittney Cummins	Governor's Office	Senior Advisor for Education

*Committee co-chairs noted in **bold** font.

APPENDIX B: STAKEHOLDER INPUT

Utah Accountability Redesign Initiative Stakeholder Engagement Report

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SURVEY RESULTS

- Demographics
- Accountability Data Use
- Importance of Academic Information
- Indicators of School Quality
- Public Presentation of Accountability Information

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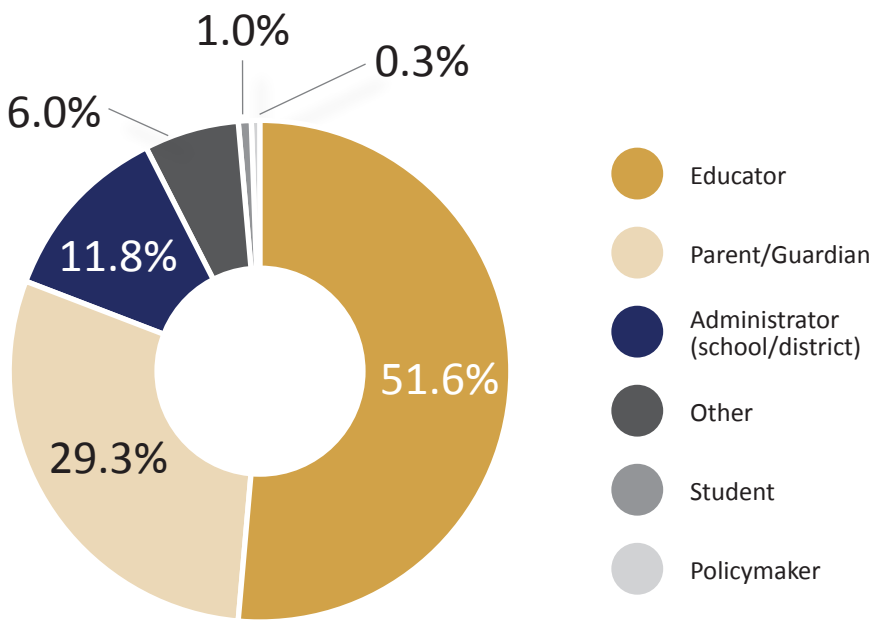
- Observations of Survey Results
- School Quality Deep Dive Summary

IN-PERSON SESSION SUMMARY

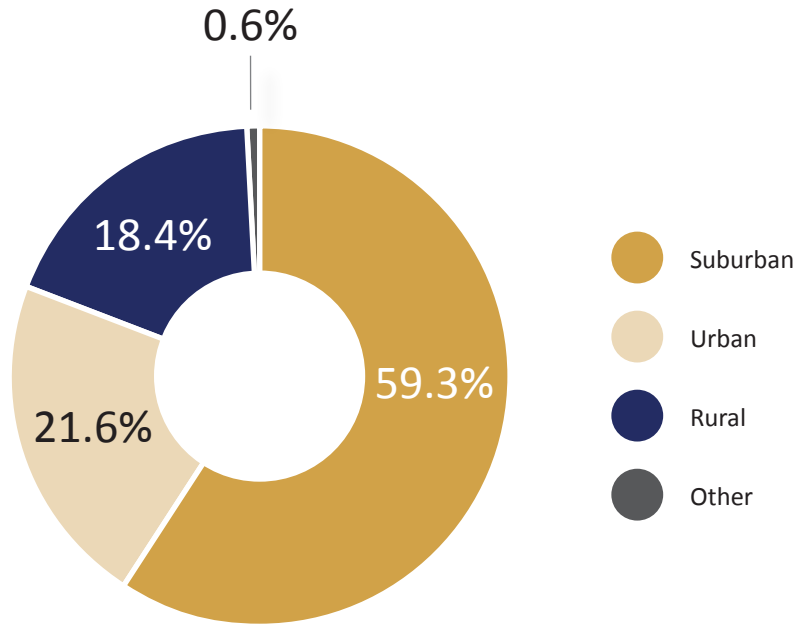
- Key Questions for Public Feedback
- Key Themes Related to Accountability

SURVEY DEMOGRAPHICS

Breakdown of Total Survey Respondents, by Primary Role/ Affiliation (*n=4,218*)

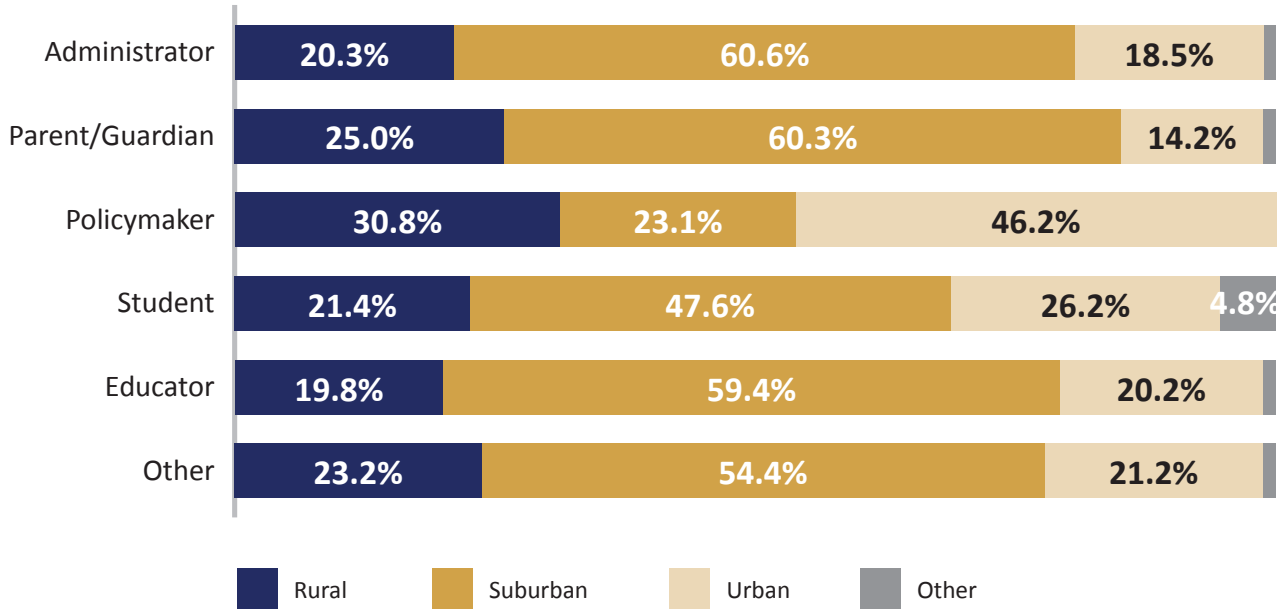


Breakdown of Total Survey Respondents, by Locale (*n=4,204*)

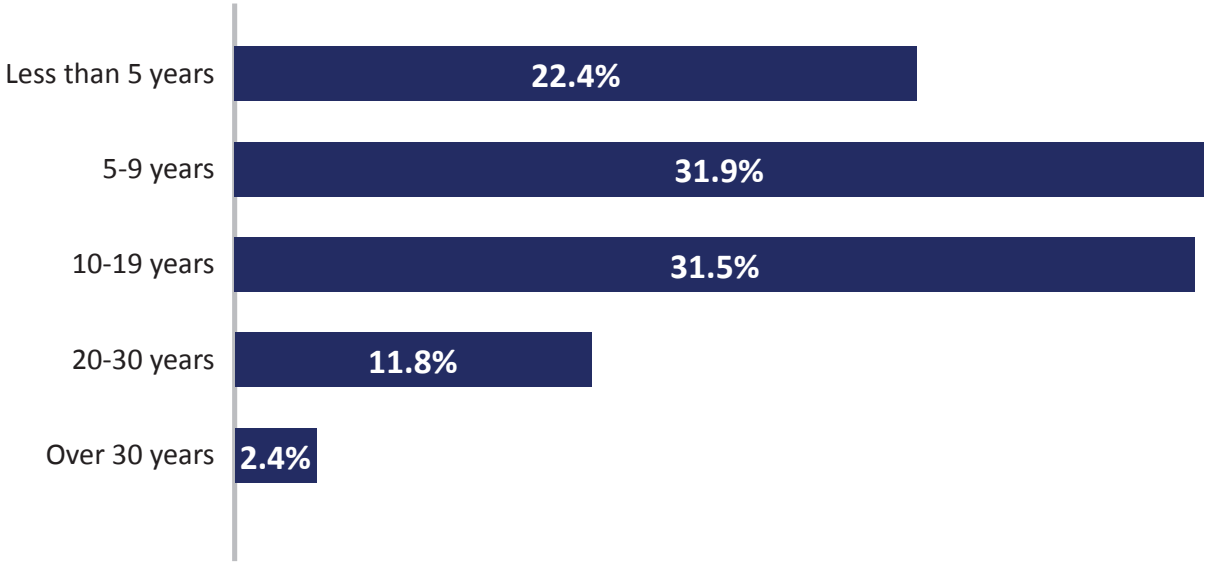


SURVEY DEMOGRAPHICS (CONTINUED)

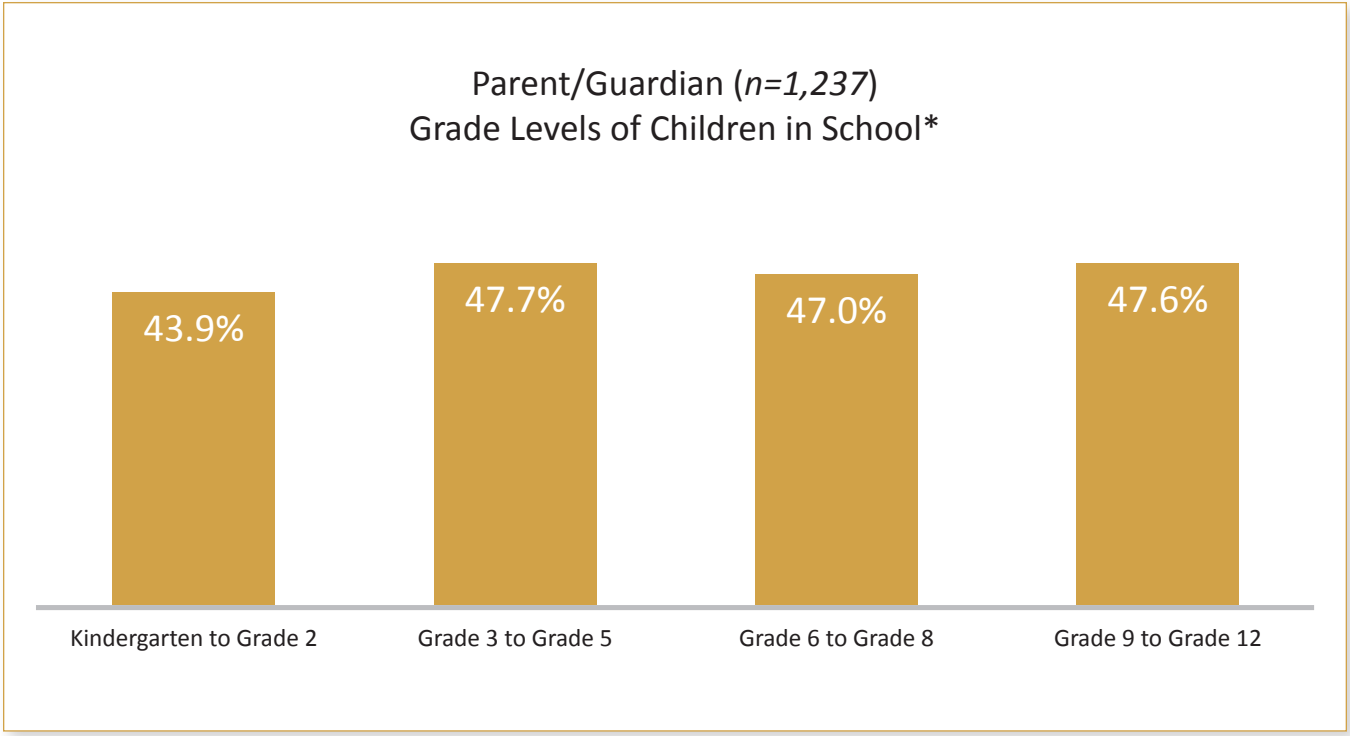
Locale of Respondents, Breakdown by Primary Role/Affiliation (*n=4,204*)

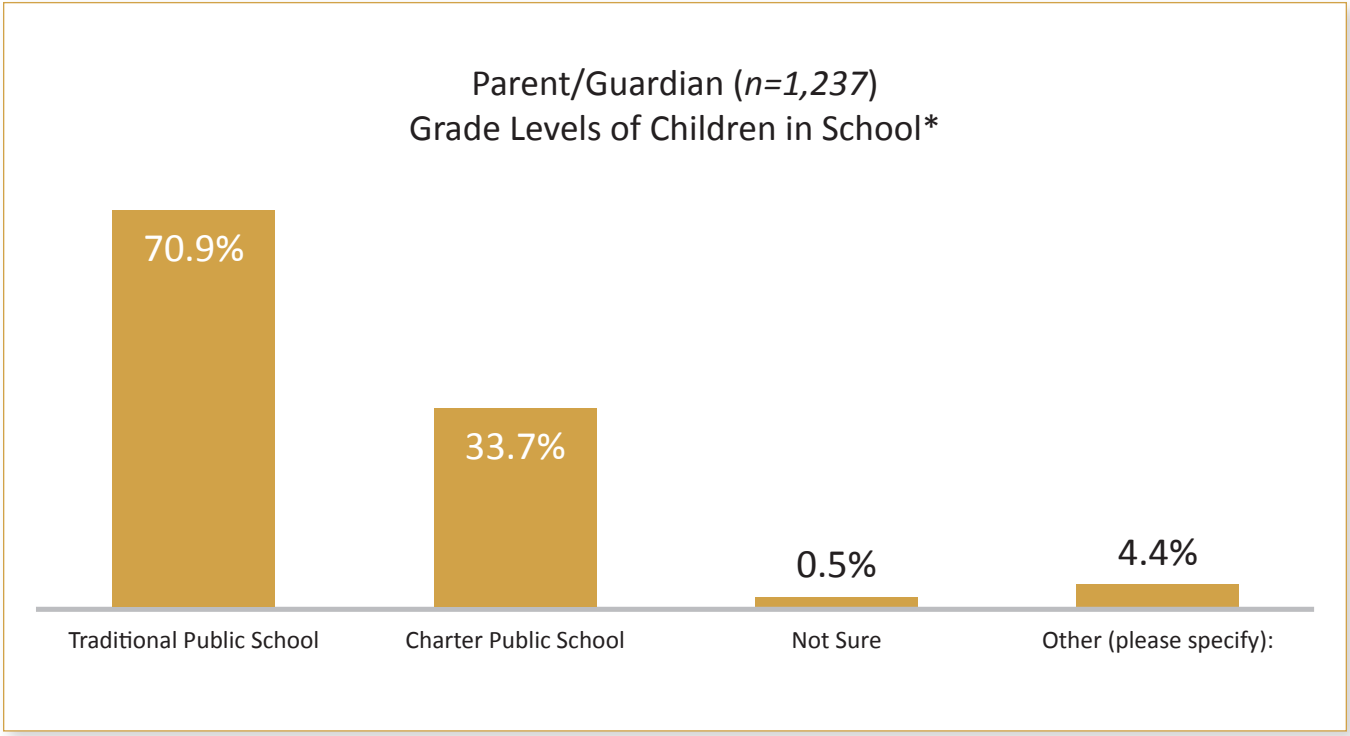


Admin - Number of Years Working as School/District Administrator (*n=499*)

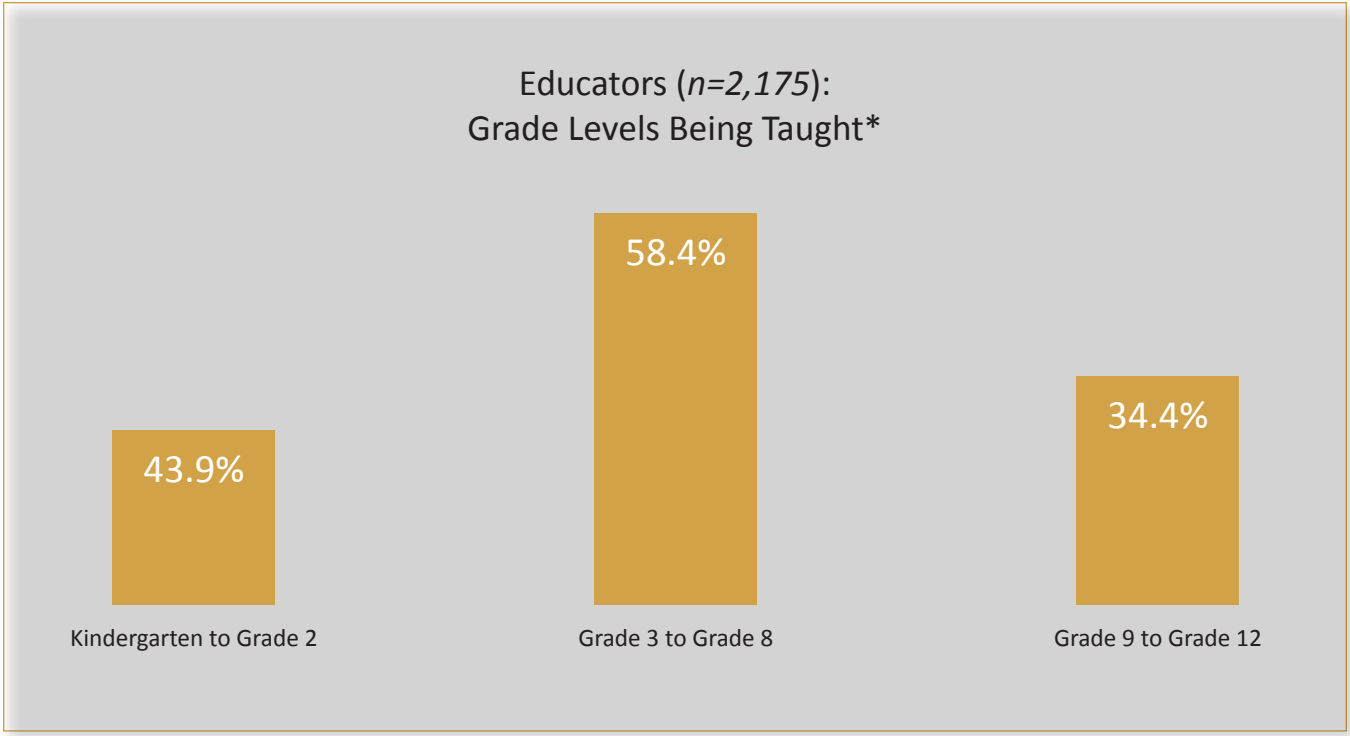


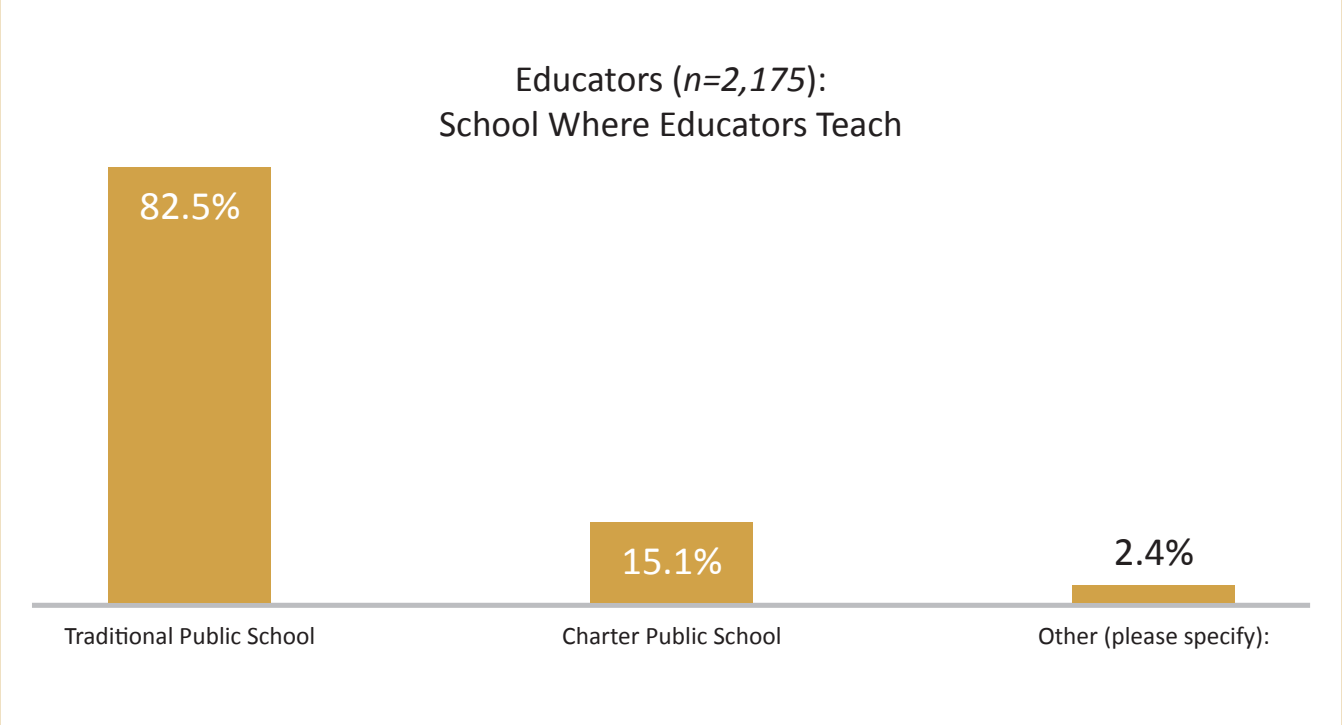
SURVEY DEMOGRAPHICS (CONTINUED)



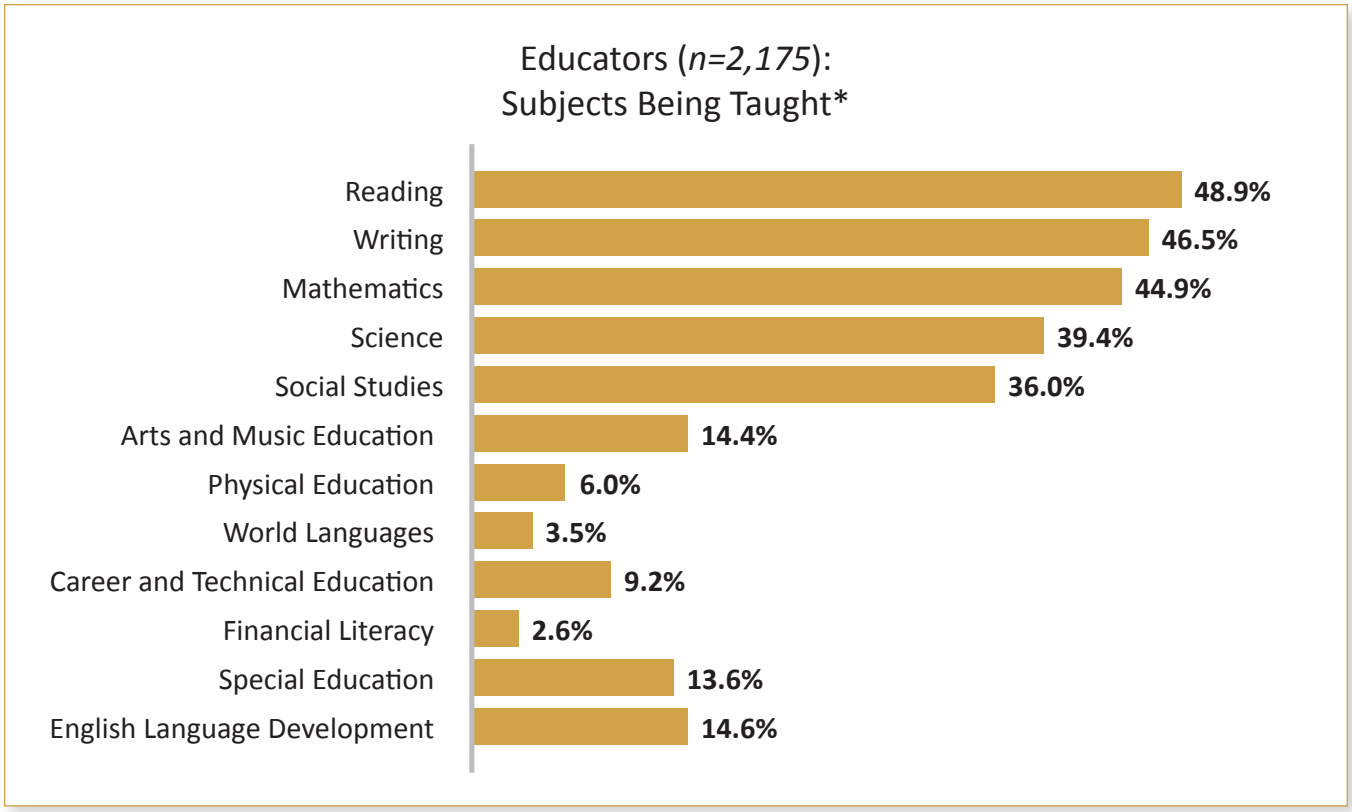


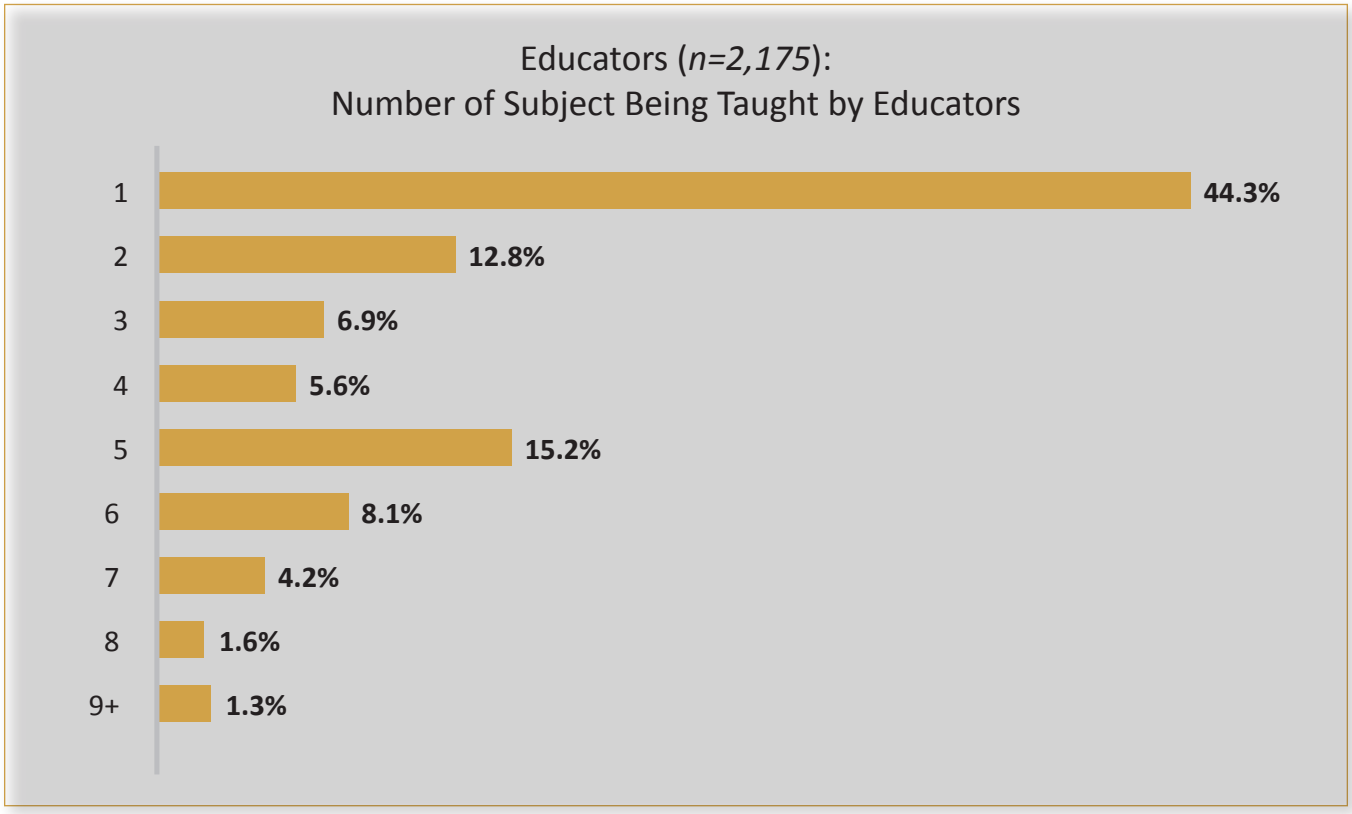
SURVEY DEMOGRAPHICS (CONTINUED)



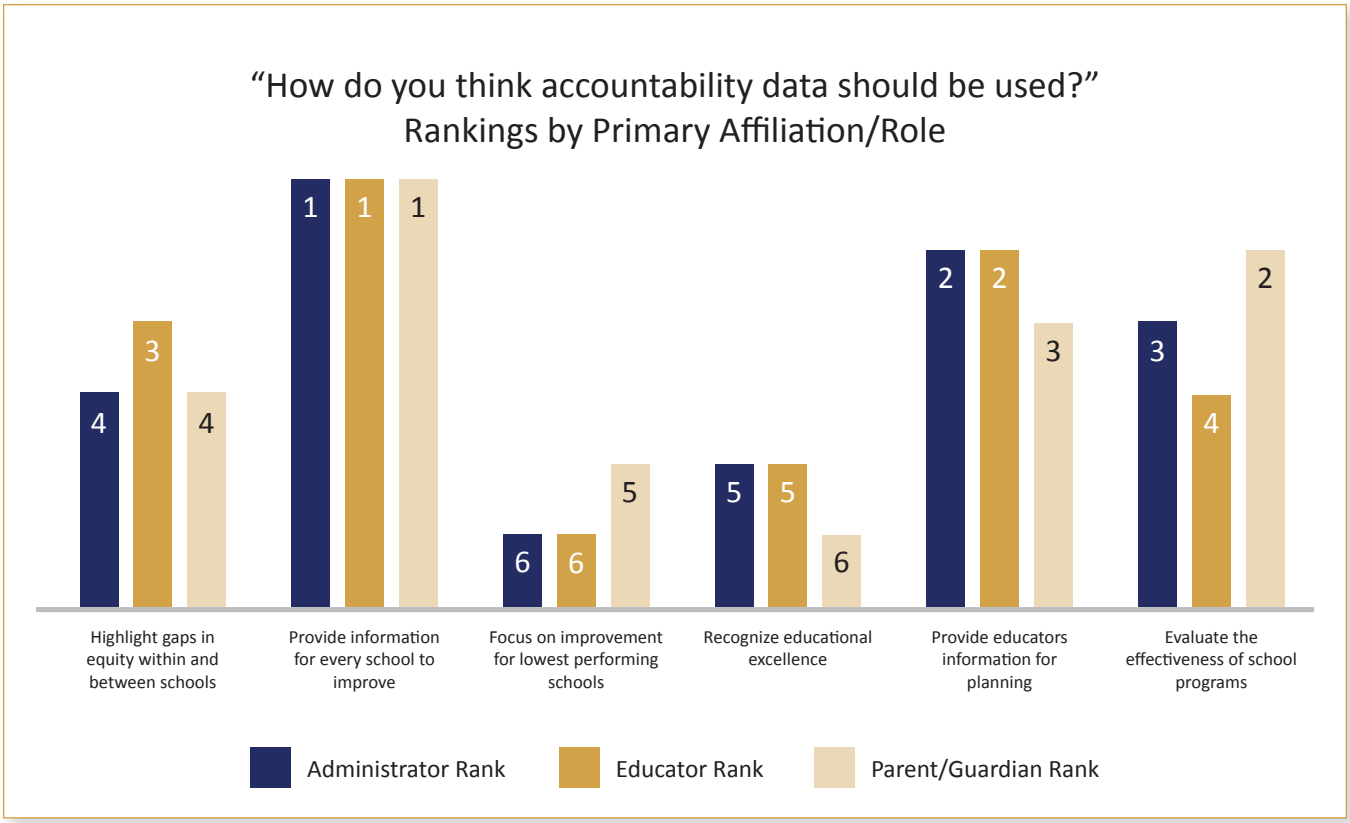


SURVEY DEMOGRAPHICS (CONTINUED)



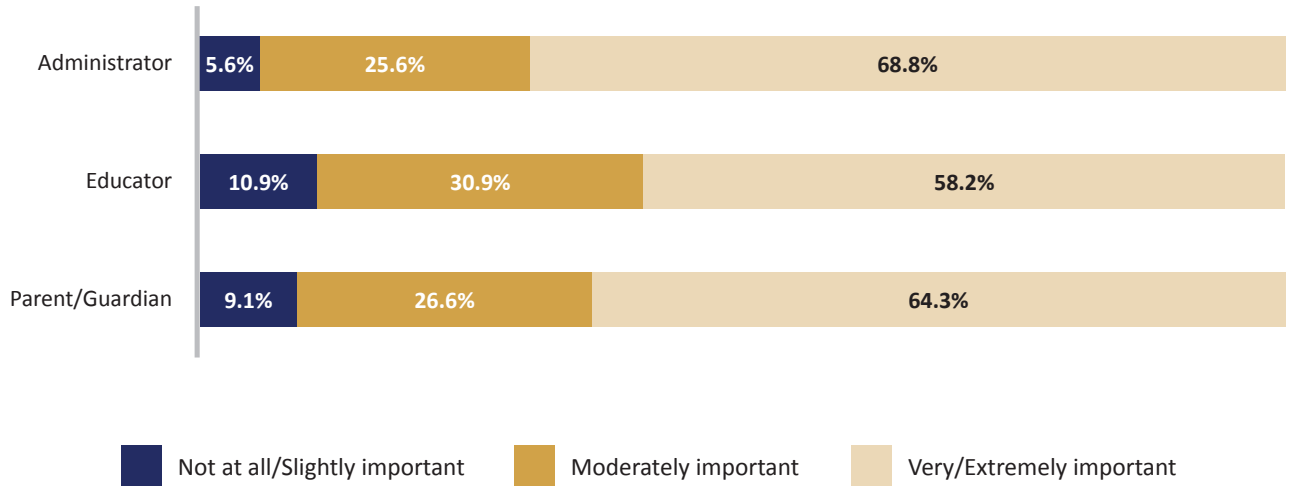


ACCOUNTABILITY DATA USE

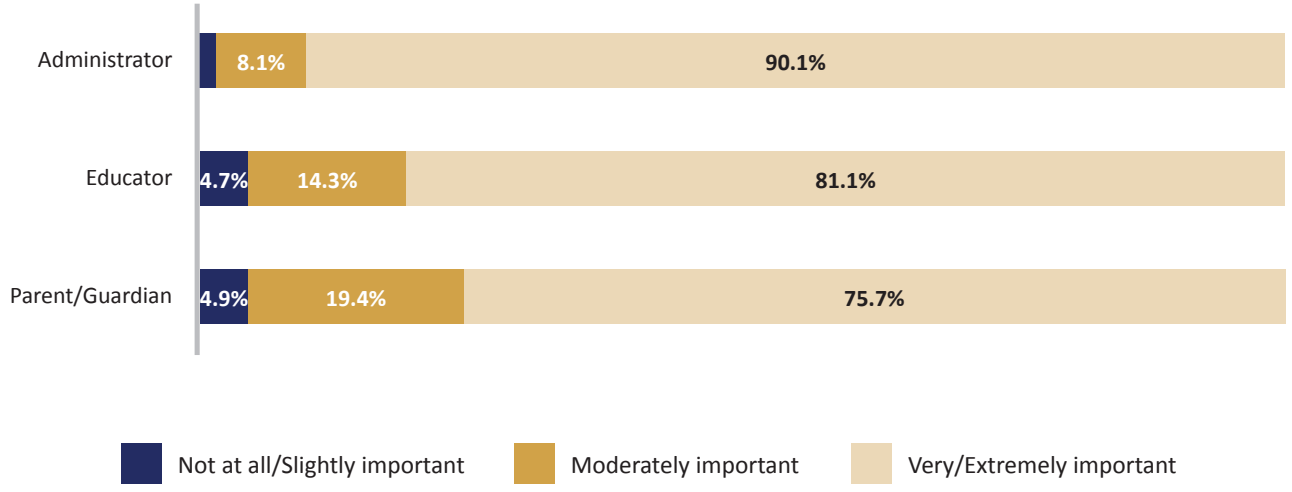


IMPORTANCE OF ACADEMIC INFORMATION

Importance of Specific Types of Academic Information that Characterize School Quality (from Utah's Current Accountability System):
Current Academic Achievement

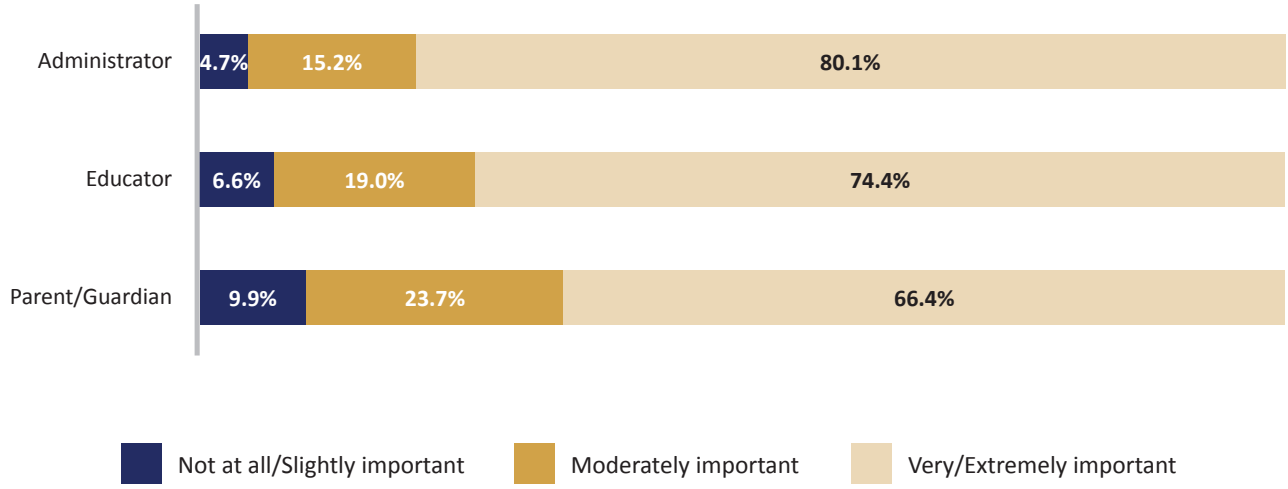


Importance of Specific Types of Academic Information that Characterize School Quality (from Utah's Current Accountability System):
Academic Growth Over Time

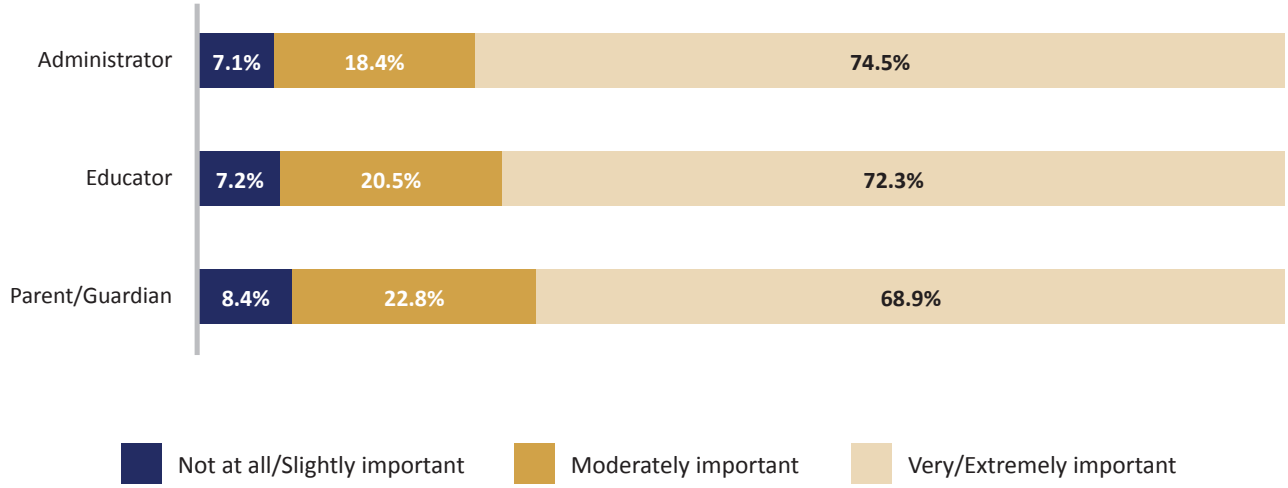


IMPORTANCE OF ACADEMIC INFORMATION (CONTINUED)

Importance of Specific Types of Academic Information that Characterize School Quality (from Utah's Current Accountability System):
Reducing Academic Achievement Gaps

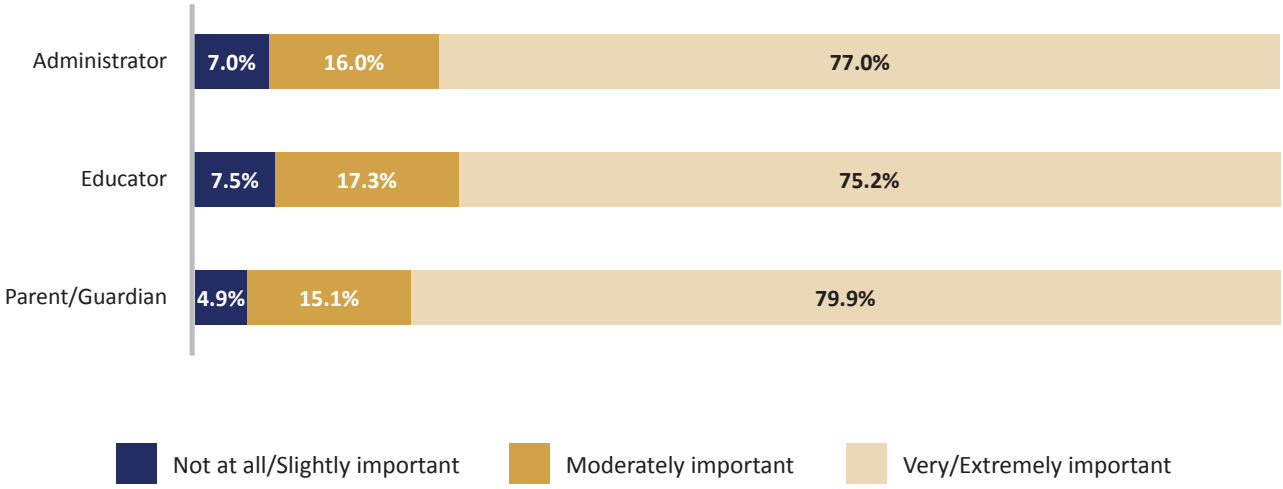


Importance of Specific Types of Academic Information that Characterize School Quality (from Utah's Current Accountability System):
Improving English Language Proficiency

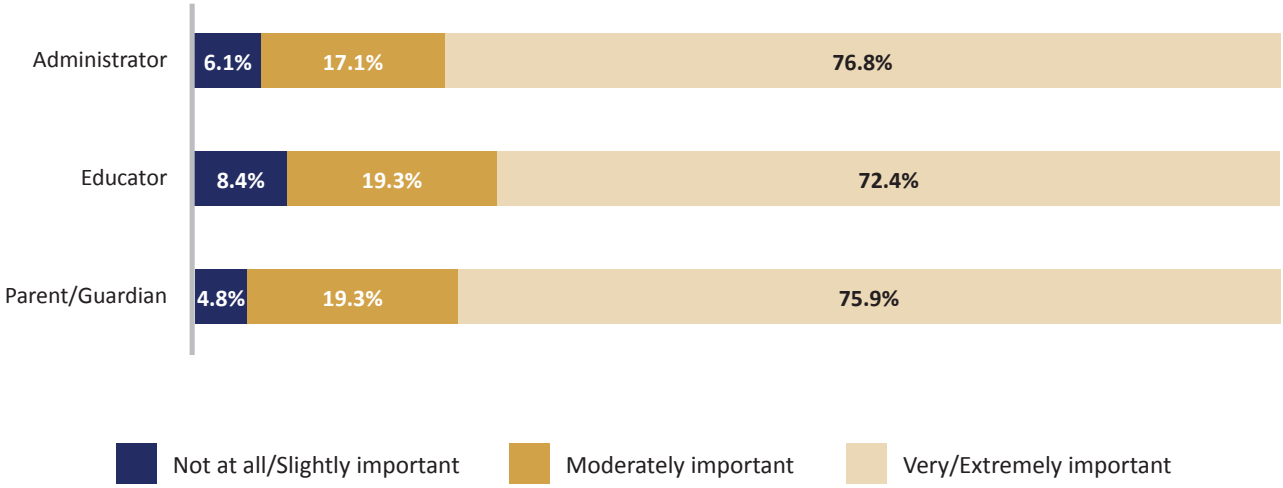


IMPORTANCE OF ACADEMIC INFORMATION (CONTINUED)

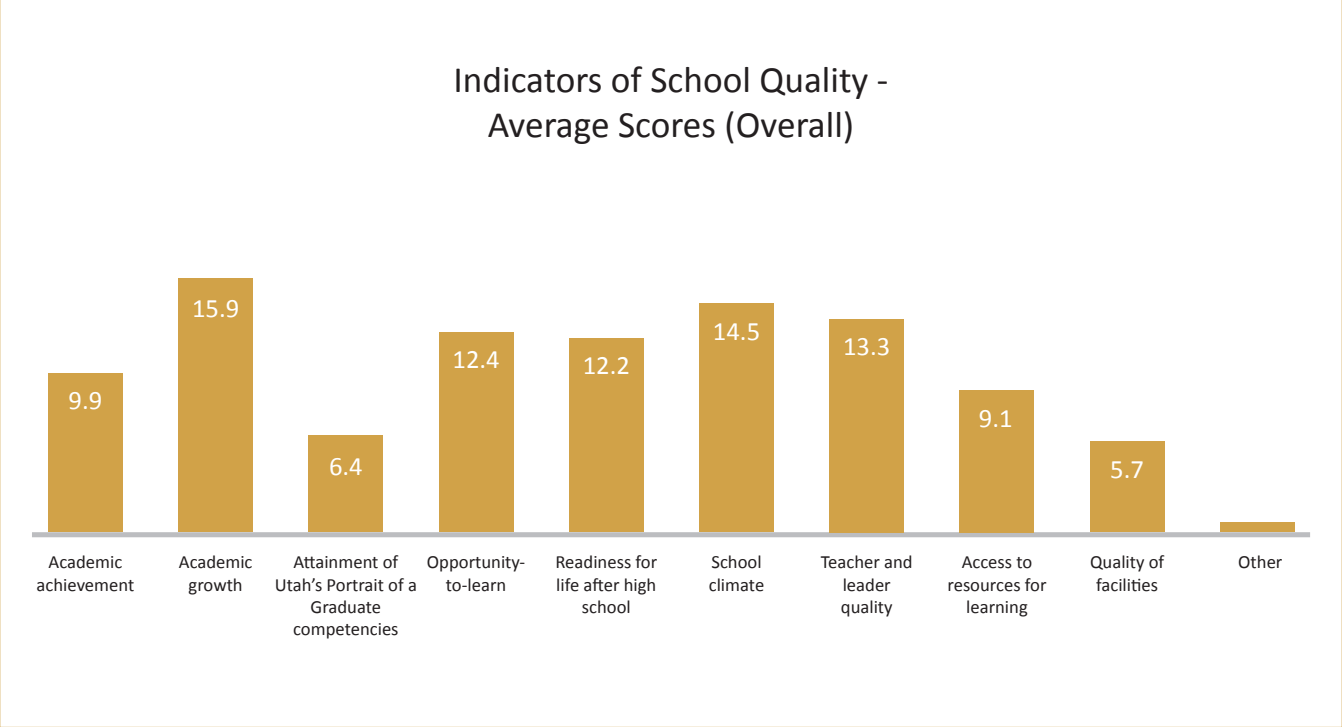
Importance of Specific Types of Academic Information that Characterize School Quality (from Utah's Current Accountability System):
Improving Graduation Rates

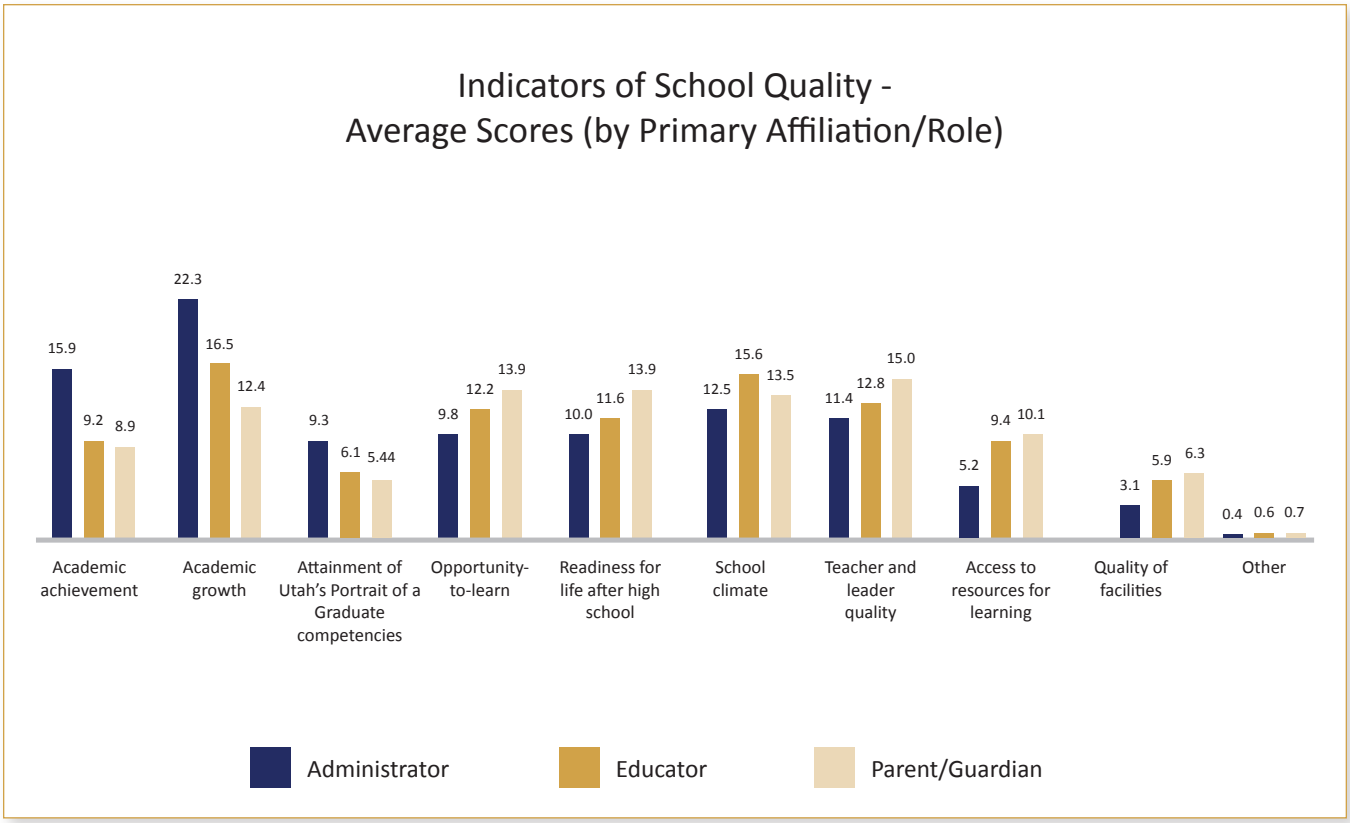


Importance of Specific Types of Academic Information that Characterize School Quality (from Utah's Current Accountability System):
Improving Postsecondary Readiness



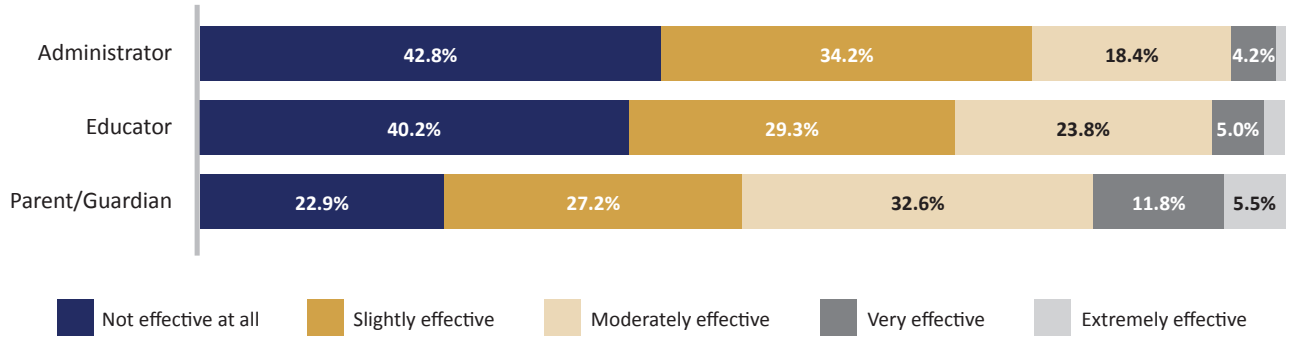
INDICATORS OF SCHOOL QUALITY



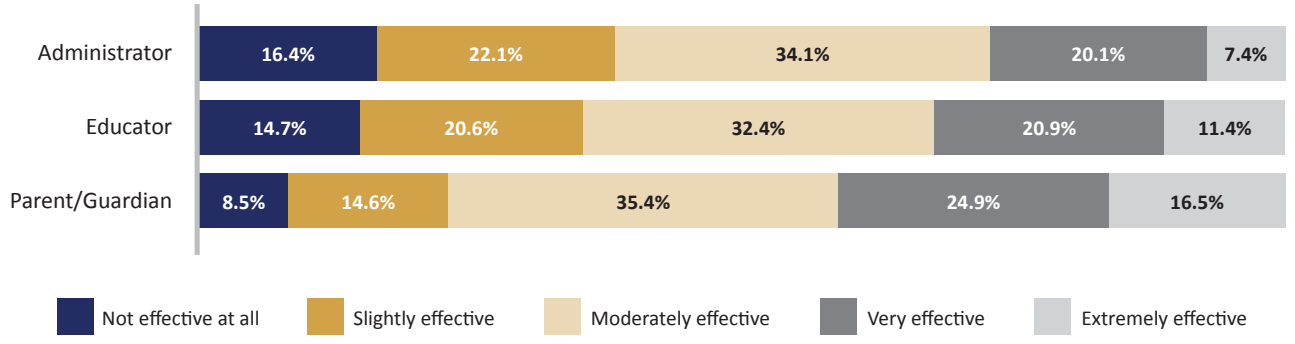


PUBLIC PRESENTATION OF ACCOUNTABILITY INFORMATION

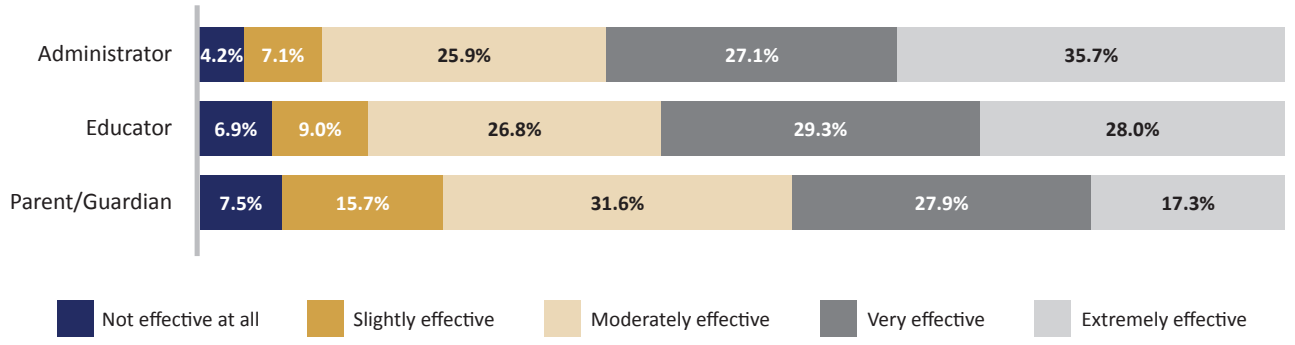
Presentation of Accountability System Results:
"Every school receives a single rating/ranking along on the 5-point scale"



Presentation of Accountability System Results:
"Every school receives a single rating/ranking along on the 5-point scale with an associated data dashboard that stakeholders can review to understand the rating"



Presentation of Accountability System Results:
"School quality measures are presented in a data dashboard format only that displays strengths and weakness for each school without overall ratings/rankings"



VIRTUAL SESSION SUMMARY

On March 1st and March 3rd of 2022, the Utah State Board of Education (USBE) convened virtual engagement sessions to gather feedback from the public on the redesign of Utah's school accountability system. Participants were presented with preliminary results from the February 2022 public survey and asked to discuss their reactions and implications.

You may review the materials for these meetings at the links below:

- March 1st Session
  - Meeting Recording
  - Meeting Jamboard
- March 3rd Session
  - Meeting Recording
  - Meeting Jamboard

Participant Observations of Survey Results

Key Themes

- Respondent roles
  - Teachers and suburban communities are highly represented on the survey
  - It will be important for design committee members to review the survey results disaggregated by role
- Value of academic growth
  - Academic growth was valued most highly by survey respondents (over academic achievement)
  - This should factor into the inclusion of testing data in the new system
  - Academic growth is nuanced and may be complex to measure
- Portrait of a Graduate
  - This indicator of quality was scored relatively lower than other areas
  - Participants thought this might be because of low name identification
  - Participants also thought this may be because the Portrait may be captured in other indicators (like readiness for life after graduation)
  - Participants suggested that there would need to be a public engagement process to familiarize the public with the Portrait if it is to ground the new accountability
- Range of indicators
  - Participants noted that a range of indicators were valued by the public and that the top 5 indicators were all valued with similar weight (academic growth, school climate, teacher & leader quality, opportunity-to-learn, readiness for life after high school)
  - This indicates a desire for school quality to be judged across a range of indicators
  - Additional areas surfaced for inclusion in the system:
    - Parent/family engagement
    - Student voice
    - Socio-economic status of students served

SCHOOL QUALITY DEEP DIVE SUMMARY

In the second half of the virtual engagement sessions, participants were asked to dig deeper into some of the most highly-rated key areas. Participants were asked to focus on areas on the survey that were rated just behind academic growth (the most highly rated area) and consider how they might be best included in the new accountability system.

Key Areas of School Quality

- School climate
  - Collaboration is present and valued across all levels of the school
  - All members of the school community feel safe, valued, and included
  - What could be measured:
    - Surveys
    - Walkthrough tools
    - Attendance
    - All data need to be disaggregated to look for disparate impact by subgroups
- Teacher & leader quality
  - The system should incentivize schools with teachers who are highly prepared
  - The system could look at the quality of student:teacher and parent:teacher relationships
  - This area is very complex to measure and what is easy to measure may not be the most important thing
  - What could be measured:
    - Surveys
    - Quality of teacher curriculum and instruction (including the degree to which the learning is personalized for students)
    - Opportunities for teacher collaboration and professional development
- Opportunity-to-learn
  - Students need to have a range of high quality options/pathways for learning
  - There should be effective mechanisms for communication of options to students and families
  - Student and family culture should be respected in the curriculum
  - This data need to be disaggregated by subgroup to ensure equal access
  - What could be measured:
    - Course offerings
    - Student/family engagement
    - CTE certificates/pathway credentials
- Readiness for life after high school
  - Students should be equipped for whatever life they choose
  - Students should be prepared to create and sustain healthy relationships
  - What could be measured:
    - Graduation rates
    - Participants did not feel the ACT was a good measure of college readiness
    - Post-graduation data - current measures are okay, but design committees may consider different weights/distribution
    - Portrait of a Graduate competencies

IN-PERSON SESSION SUMMARY

On April 19th and April 20th of 2022, the Utah State Board of Education (USBE) convened in-person engagement sessions to gather feedback from the public on the redesign of Utah's school accountability system. Participants were asked to discuss key questions constructed by the Advisory Committee.

Key Questions for Public Feedback

Designed by the Advisory Committee in April 2022.

- Utah's Portrait of a Graduate
  - What skills do you value most in a graduate?
  - After reviewing Utah's Portrait of a Graduate, how would you measure these competencies? Which competencies feel most important? Which are the best indicators of school quality?
- Quality of Educators and School Leaders
  - How do you determine the quality of a teacher?
  - How does the quality of a teacher affect the quality of a school?
  - How do you determine the quality of a school leader (superintendent/principal)?
- Time & Resource Investment in Collecting Data
  - How much time would you spend providing data (e.g. surveys)? How much time should learners spend? Teachers? School leaders?
  - How much time would you spend reviewing accountability data? How much time should learners spend? Teachers? School leaders?
  - What other thoughts do you have about data collection for the purposes of accountability?

Key Themes Related to Accountability

- There is a strong desire for the system to be more transparent
- Parent engagement is a key aspect of school quality
- There is value for many of the areas articulated in the PoG but the relationship between those skills and traditional, discipline specific content is not yet clear to the public
- The system should continue to assess academic success
- Teacher and leader quality is critical and should be measured both by quality of outcomes (academic success) and quality of relationships
- The system should include different types of data, but that collection of data should be streamlined
- Data should be presented in a clear and flexible format (so users can see the data that are most important to them)

Note: While the topic of these meetings was focused on the redesign of the Utah state school accountability system, key themes emerged in areas which are controlled by local policy (like curriculum decisions, technology implementation and resource selection). As a matter of public record and to support local policy conversations, a complete summary of comments collected can be found here (organized by topic) and here (in a searchable PDF).

APPENDIX L:

STATEWIDE FAMILY SERVICE CENTER LEASE OPTIONS

Build-to-Suit in Willbrook Professional Park

228 S Mall Dr
St. George, UT 84790

FOR LEASE

Property Brochure

PRESENTED BY:

CURREN CHRISTENSEN
+1 435 627 5752
LIC: 6431250-SA00
Send Message >

1,700	0.98	A-P	2023/2024	32918	Office
Square Feet	Acres	Zoning	Year Built	Property ID	Medical Office

	SF/MO	SF/YR	ANNUAL RENT	TYPE	SQ FT
A	$1.67	$20.04	$34,068.00	NNN	1,700
B	$1.67	$20.04	$40,080.00	NNN	2,000
C	$1.67	$20.04	$26,052.00	NNN	1,300
2nd Floor	$1.67	$20.04	$100,200.00	NNN	5,000

New Construction Retail Center

355 E 3000 N
Cedar City, UT 84721

FOR LEASE

Property Brochure

PRESENTED BY:

TWILA DAVIS
+1 435 590 8825
LIC: 5487719-BB00
Send Message >

NICOLE BLACK
+1 435 327 8237
LIC: 6456618-SA00
Send Message >

920	1.01	HC	2024	71903	Retail
Square Feet	Acres	Zoning	Year Built	Property ID	Anchorless Center

	SF/MO	SF/YR	ANNUAL RENT	TYPE	SQ FT
Unit 1	$2.30	$27.60	$25,392.00	NNN	920
Unit 2	$2.30	$27.60	$27,213.60	NNN	986
Unit 3	$2.30	$27.60	$25,005.60	NNN	906
Unit 4 - End Cap	$3.00	$36.00	$74,160.00	NNN	2,060
Unit 5 - End Cap w/ Drive Thru	$3.00	$36.00	$41,400.00	NNN	1,150
Unit 6	$2.30	$27.60	$25,778.40	NNN	934
Unit 7	$2.30	$27.60	$33,175.20	NNN	1,202
Unit 8	$2.30	$27.60	$26,137.20	NNN	947

FOR LEASE › OFFICE SPACE

East Bay Office

75 & 151 EAST 1700 SOUTH PROVO, UTAH

Property Information

- **Lease Rate:** $18.00 to $20.00 psf Full Service
- **Available West Bldg:** 7,664 SF & 14,786 SF
- **Available East Bldg:** 2,000 SF - 20,000 SF
- Abundant natural light and mountain views
- Quick and easy access to the Provo-Orem area
- Superior access to I-15 via University Ave
- Building exterior signage available for qualified tenants
- Good onsite parking
- An abundance of amenities within close proximity
- Located in Opportunity Zone

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brandon.huntsman@colliers.com

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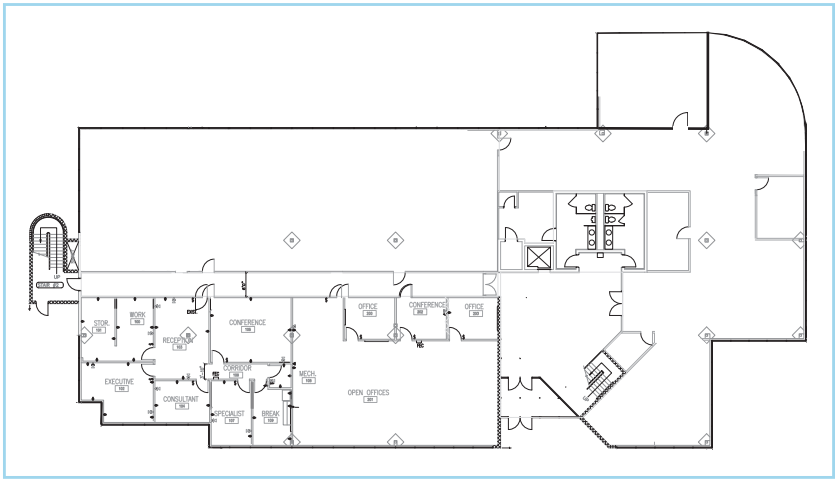
james.bullington@colliers.com

Colliers International 2100 Pleasant Grove Blvd. | Suite 200 Pleasant Grove, UT 84062

East Bay Office

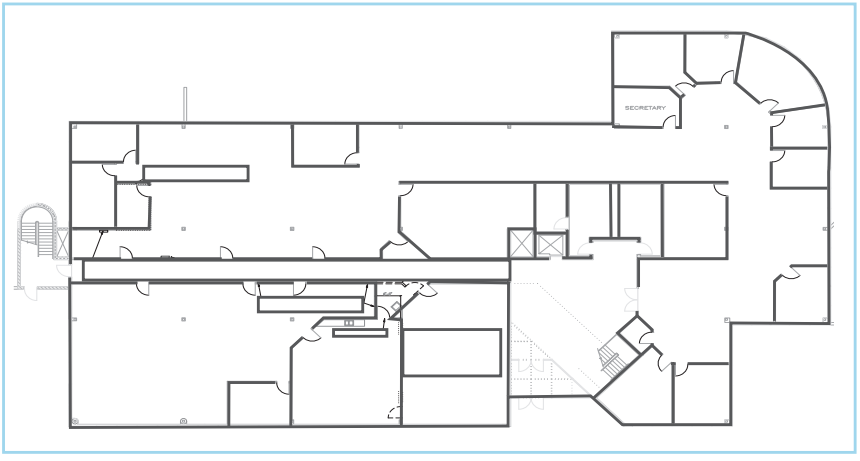
75 & 151 EAST 1700 SOUTH PROVO, UTAH

151 East - East Building



First Floor - East Building

Second Floor - East Building



Colliers INTERNATIONAL

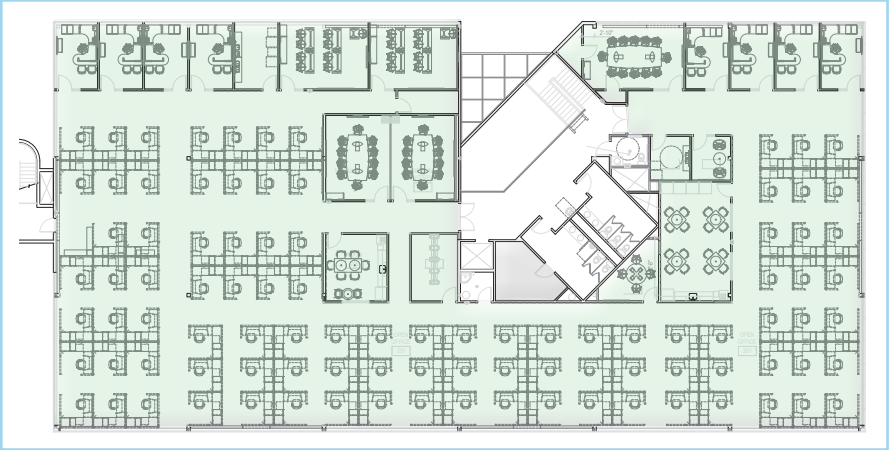
East Bay Office

75 & 151 EAST 1700 SOUTH PROVO, UTAH

75 East - West Building

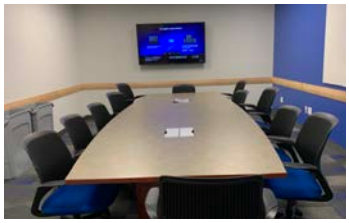
First Floor - West Building

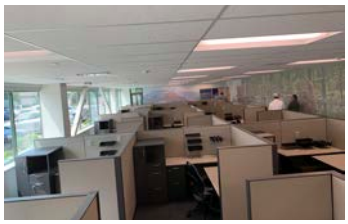
› 7,664 SF Available



Second Floor - West Building

› 14,786 SF Available





FOR LEASE > OFFICE SPACE

East Bay Office

75 & 151 EAST 1700 SOUTH PROVO, UTAH

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Colliers International
2100 Pleasant Grove Blvd. | Suite 200
Pleasant Grove, UT 84062
P: +1 801 610 1300

Office for lease

7084 S. 2300 E.

Cottonwood Heights, Utah 84121

Property Highlights

- **Lease Rate: $18.00/SF, full service less in-suite janitorial**
- Abundant amenities nearby
- Great access to I-215
- Beautiful mountain views
- Across the street from multi-use development
- 4.5/1000 strong parking ratio
- Monument signage available

Available:

Suite 130
1,310 SF

Suite 200
1,578 RSF

Suite 210
1,367 RSF

Suite 260
521 RSF

Contact:

Rusty Lugo
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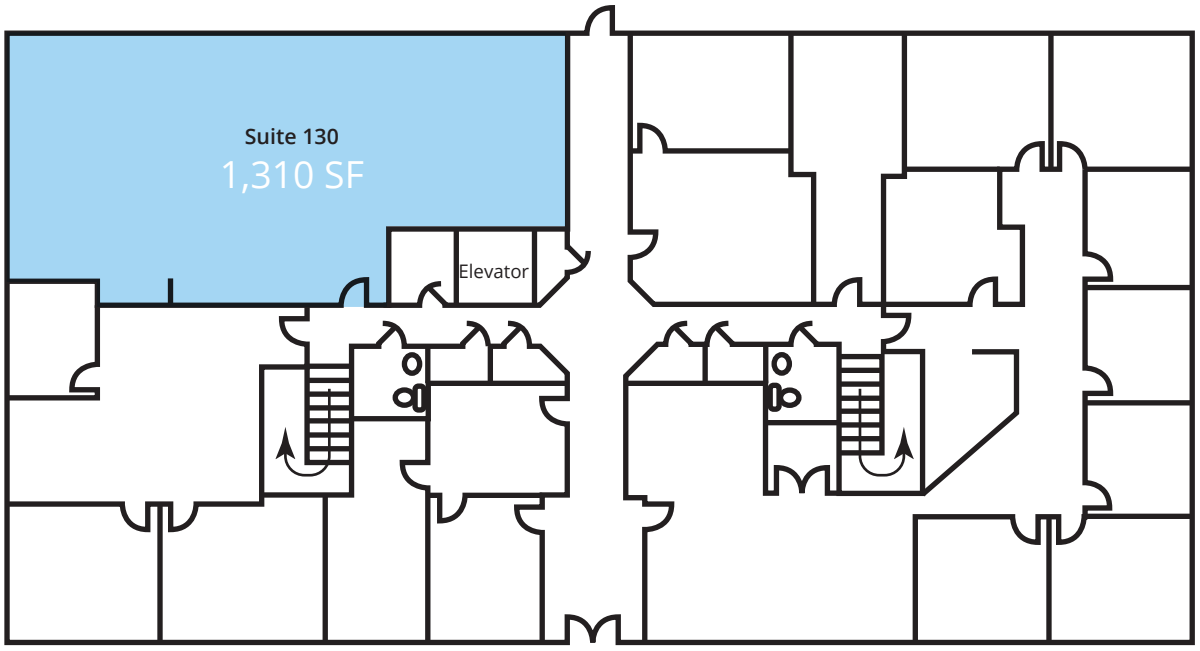
Floor Plan

1st Floor



2nd Floor

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APPENDIX M:

CUSTOM CLASS BUDGET
2025 - 2028

Custom Class Charter School		FY 2025-26					
Pre Operational Year		**100% Enrollment**			**Breakeven Enrollment**		
Number of Students:		0			0		
Grade Configuration:		K-12			K-12		
Revenue							
Food Services Sales to Students		0	$0		0	$0	
Student Activities							
Contributions and Donations from Private Sources:							
Source(s) (*specify)*		$0			$0		
Miscellaneous		$0			$0		
Total Revenue From Local Sources (1000)		**$0**			**$0**		
Estimated Total All State Funding		$ -			$ -		
Charter School Revolving Loan		$300,000			$300,000		
Charter School Startup and Implementation Grant		$302,500			$302,500		
Total Revenue from State Sources (3000)		**$602,500**			**$602,500**		
Federal Child Nutrition Program		0	$0		0	$0	
Restricted Federal Grants-in-Aid Received via USBE (IDEA)		$0			$0		
Federal Elementary and Secondary Education Act of 1965 (ESEA)		$0			$0		
Total Revenue from Federal Sources (4000)		**$0**			**$0**		
Loan Poceeds (other than revoving loan)		$0			$0		
Commercial		$0			$0		
Other *(specify)*		$0			$0		
Budget from Surplus (For Budgeting Purposes Only)		$0			$0		
Total Revenue from Other Sources & Changes (5000 & 6000)		**$0**			**$0**		
Total Revenue		**$602,500**			**$602,500**		
Expenditures		**Number**	**Salary/Cost**	**Total**	**Number**	**Salary/Cost**	**Total**
--- SALARIES ---							
10.131	Salaries - Teachers	0.50	$58,000	$29,000	0.50	$58,000	$29,000
10.132	Salaries - Substitute Teachers	0.00	$0	$0	0.00	$0	$0
10.161	Salaries - Teacher Aides and Paraprofessionals	0.00	$35,000	$0	0.00	$35,000	$0
10.198	Salaries - Other Classified Personnel	0.00	$0	$0	0.00	$0	$0
	Total **10 (1000)-INSTRUCTION** Salaries (100)			**$29,000**			**$29,000**
21.141	Salaries - Attendance and Social Work Personnel	0.00	$0	$0	0.00	$0	$0
21.142	Salaries - Guidance Personnel	0.25	$58,000	$14,500	0.25	$58,000	$14,500
21.143	Salaries - Health Services Personnel	0.00	$0	$0	0.00	$0	$0
21.144	Salaries - Psychological Personnel	0.00	$0	$0	0.00	$0	$0
21.152	Salaries - Secretarial and Clerical	0.00	$0	$0	0.00	$0	$0
21.198	Salaries - Other Classified Personnel	0.00	$35,000	$0	0.00	$35,000	$0
	Total - STUDENT SUPPORT Salaries (100)			**$14,500**			**$14,500**
22.145	Salaries - Licensed Media Personnel	0.00	$0	$0	0.00	$0	$0
22.162	Salaries - Non-licensed Media Personnel	0.00	$0	$0	0.00	$0	$0
22.198	Salaries - Other Classified Personnel	0.00	$0	$0	0.00	$0	$0
	Total - **INSTRUCTIONAL STAFF SUPPORT** Salaries (100)			**$0**			**$0**
24.121	Salaries Principals and assistant principals	0.75	$145,000	$108,750	0.75	$145,000	$108,750
24.152	Salaries - Secretarial and Clerical Personnel	0.75	$40,000	$30,000	0.75	$40,000	$30,000
24.198	Salaries - Other Classified Personnel	0.75	$75,000	$56,250	0.75	$75,000	$56,250
	Total **-SCHOOL ADMINISTRATION** Salaries (100)			**$195,000**			**$195,000**
26.181	Salaries - Operation & Maintenance Supervisors	0.00	$0	$0	0.00	$0	$0
26.182	Salaries - Custodial & Maintenance Personnel	0.00	$0	$0	0.00	$0	$0
	Total **-OPERATION & MAINT OF FACILITIES** Salaries (100)			**$0**			**$0**
31.191	Salaries - Food Services Personnel	0.00	$0	$0	0.00	$0	$0
	Total **-FOOD SERVICES** Salaries (100)			**$0**			**$0**
	TOTAL - SALARIES (100)			**$238,500**			**$238,500**
--- EMPLOYEE BENEFITS ---							
10.210	State Retirement - Instruction	5%	$29,000	$1,450	5%	$29,000	$1,450
21.210	State Retirement - Student Support	5%	$14,500	$725	5%	$14,500	$725
22.210	State Retirement - Instructional Staff Support	5%	$0	$0	5%	$0	$0
24.210	State Retirement - School Administration	5%	$195,000	$9,750	5%	$195,000	$9,750
26.210	State Retirement - Operation & Main of Facilities	5%	$0	$0	5%	$0	$0
31.210	State Retirement - Food Services	5%	$0	$0	5%	$0	$0
	Total - State Retirement			**$11,925**			**$11,925**
10.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$29,000	$2,900	10%	$29,000	$2,900
21.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$14,500	$1,450	10%	$14,500	$1,450
22.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$0	$0	10%	$0	$0
24.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$195,000	$19,500	10%	$195,000	$19,500
26.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$0	$0	10%	$0	$0

31.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$0	$0	10%	$0	$0
	Total - Social Security Contributions/Workers' Compensation/Unemployment Insurance			**$23,850**			**$23,850**
10.240	Medical Insurance/Dental Insurance/Group Life - Instruction	15%	$29,000	$4,350	15%	$29,000	$4,350
21.240	Medical Insurance/Dental Insurance/Group Life - Student Support	15%	$14,500	$2,175	15%	$14,500	$2,175
22.240	Medical Insurance/Dental Insurance/Group Life - Instructional Staff Su	15%	$0	$0	15%	$0	$0
24.240	Medical Insurance/Dental Insurance/Group Life - School Administratio	15%	$195,000	$29,250	15%	$195,000	$29,250
26.240	Medical Insurance/Dental Insurance/Group Life - Operation & Mainten	15%	$0	$0	15%	$0	$0
31.240	Medical Insurance/Dental Insurance/Group Life - Food Services	15%	$0	$0	15%	$0	$0
	Total- Medical Insurance/Dental Insurance/Group Life			**$35,775**			**$35,775**
10.290	Other Employee Benefits *(specify)* - Instruction	0%	$29,000	$0	0%	$29,000	$0
21.290	Other EmployeeBenefits *(specify)* - Student Support	0%	$14,500	$0	0%	$14,500	$0
22.290	Other Employee Benefits (specify) - Instructional Staff Support	0%	$0	$0	0%	$0	$0
24.290	Other Employee Benefits *(specify)* - School Administration	0%	$195,000	$0	0%	$195,000	$0
26.290	Other Employee Benefits *(specify)* - Operation & Maintenance of Facil	0%	$0	$0	0%	$0	$0
31.290	Other Employee Benefits *(specify)* - Food Services	0%	$0	$0	0%	$0	$0
	Total - Other Employee Benefits			**$0**			**$0**
	TOTAL EMPLOYEE BENEFITS (200)			**$71,550**			**$71,550**
	--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---						
10.300	Purchased Prof & Tech Services - Instruction	0.00	$1,000	$0	0.00	$1,000	$0
21.300	Purchased Prof & Tech Services - Student Support	0.00	$50,000	$0	0.00	$50,000	$0
22.300	Purchased Prof & Tech Services - Instructional Staff Support	1.00	$15,000	$15,000	1.00	$15,000	$15,000
24.300	Purchased Prof & Tech Services - School Administration	1.00	$15,000	$15,000	1.00	$15,000	$15,000
26.300	Purchased Prof & Tech Services - Operation & Maintenance of Facilitie	1.00	$10,000	$10,000	1.00	$10,000	$10,000
31.300	Purchased Prof & Tech Services - Food Services			$0			$0
	TOTAL - PURCHASED PROFESSIONAL & TECHNICAL SERVICES (300)			**$40,000**			**$40,000**
	--- PURCHASED PROPERTY SERVICES ---						
26.400	Purchased Property Services			$0			$0
26.441	Rental of Land & Buildings	1.00	$25,000	$25,000	1.00	$25,000	$25,000
26.450	Construction Services			$0			$0
	TOTAL - PURCHASED PROPERTY SERVICES (400)			**$25,000**			**$25,000**
	--- OTHER PURCHASED SERVICES ---						
27.510	Student Transportation Services (To/From School)			$0			$0
24.520	Insurance (other than employee benefits - e.g. D&O)			$30,000			$30,000
45.521	Property Insurance	**1.00**	$2,500	$2,500	**1.00**	$2,500	$2,500
45.522	Liability Insurance			$10,000			$10,000
10.530	Communication (telephone and other) - Instructional			$0			$0
21.530	Communication (telephone and other) - Student Support			$0			$0
24.530	Communication (telephone and other) - School Administation			$3,000			$3,000
26.530	Communication (telephone and other) - Operation and Maintenance of			$0			$0
24.540	Advertising			$25,000			$25,000
10.550	Printing and Binding - Instruction			$0			$0
21.550	Printing and Binding - Student Support			$0			$0
24.550	Printing and Binding - School Administration			$1,000			$1,000
10.560	Tuition			$0			$0
21.570	Food Service Management			$0			$0
21.580	Staff Travel/Per Diem - Student Support			$0			$0
24.580	Staff Travel/Per Diem - School Administration			$3,000			$3,000
26.580	Staff Travel/Per Diem - Operation and Maintenance of Facilities			$0			$0
10.590	Inter-educational, Interagency Purchased Services			$0			$0
	TOTAL - OTHER PURCHASED SERVICES (500)			**$74,500**			**$74,500**
	--- SUPPLIES & MATERIALS---						
10.600	Supplies & Materials - Instruction	0	$500	$0	0	$500	$0
10.641	Textbooks	0	$50	$0	0	$50	$0
21.600	Supplies & Materials - Student Support	0	$100	$0	0	$100	$0
22.640	Books and Periodicals	0	$0	$0	0	$0	$0
22.644	Library Books	0	$0	$0	0	$0	$0
24.600	Supplies & Materials - School Administration	1	$10,000	$10,000	1	$10,000	$10,000
26.600	Supplies & Materials - Operation & Maintenance of Facilities	1	$10,000	$10,000	1	$10,000	$10,000
31.600	Supplies & Materials - Food Service	0	$0	$0	0	$0	$0
31.630	Food - Food Service			$0			$0
	TOTAL - SUPPLIES & MATERIALS (600)			**$20,000**			**$20,000**
	--- PROPERTY ---						
10.700	Property - Instruction	**0.00**	$750	$0	0.00	$750	$0
21.700	Property - Student Support	**0.00**	$2,000	$0	0.00	$2,000	$0
24.700	Property - School Administration	**4.00**	$2,000	$8,000	4	$2,000	$8,000
26.700	Property - Operation & Maintenance of Facilities			$0			$0

31.700	Property - Food Services			$0			$0
31.790	Depreciation and Amortization (Kitchen Equipment)	$ -	7	$0	$ -	7	$0
49.710	Land and Site Improvements			$0			$0
49.720	Buildings			$0			$0
27.732	School Buses			$0			$0
10.733	Furniture and Fixtures - Instruction	**1.00**	$25,000	$25,000	**1.00**	$25,000	$25,000
21.733	Furniture and Fixtures - Student Support			$0			$0
24.733	Furniture and Fixtures - School Administration	**1.00**	$10,000	$10,000	**1.00**	$10,000	$10,000
10.734	Technology Related Hardware - Instruction			$0			$0
21.734	Technology Related Hardware - Student Support			$0			$0
24.734	Technology Related Hardware - School Administration			$0			$0
10.736	Technology Sofware - Instruction	**75.00**	$400	$30,000	75.00	$400	$30,000
21.736	Technology Sofware - Student Support	**2.00**	$50	$100	2.00	$50	$100
24.736	Technology Sofware - School Administration	**3.00**	$50	$150	3.00	$50	$150
27.735	Non-Bus Vehicles	**0.00**	$15,000	$0	0.00	$15,000	$0
10.739	Other Equipment - Instruction	**1.00**	$20,000	$20,000	1.00	$20,000	$20,000
21.739	Other Equipment - Student Support			$0			$0
24.739	Other Equipment - School Administration			$0			$0
	TOTAL - PROPERTY (700)			**$93,250**			**$93,250**
	--- DEBT SERVICE & MISCELLANEOUS ---						
10.890	Miscellaneous Expenditures - Instuction			$0			$0
21.890	Miscellaneous Expenditures- Student Support			$0			$0
24.890	Miscellaneous Expenditures- School Administration - Closure Reserve Fund			$0			$0
26.890	Miscellaneous Expenditures - Operation & Maintenance of Facilities			$0			$0
31.890	Miscellaneous Expenditures - Food Services			$0			$0
45.890	Miscellaneous Expenditures - Facilities, Acquisition, & Constructuon Services			$0			$0
10.810	Dues & Fees - Instruction			$0			$0
21.810	Dues & Fees - Student Support			$0			$0
24.810	Dues & Fees -School Administration			$0			$0
26.810	Dues & Fees - Operation & Maintenance of Facilities			$0			$0
	Total - Miscellaneous			**$0**			**$0**
45.830	Interest on Debt			$6,797			$6,797
45.840	Redemption of Principal			$0			$0
	Total Debt Service			**$6,797**			**$6,797**
	TOTAL - DEBT SERVICE & MISCELLANEOUS (800)			**$6,797**			**$6,797**
	Total Expenditures		**$569,597**			**$569,597**	

1000	Local			$0			$0
3000	State			$602,500			$602,500
4000	Federal			$0			$0
	TOTAL REVENUES			**$602,500**			**$602,500**
100	Salaries			$238,500			$238,500
200	Employee Benefits			$71,550			$71,550
300	Purchased Professional &Technical Services			$40,000			$40,000
400	Purchased Property Services			$25,000			$25,000
500	Other Purchased Services			$74,500			$74,500
600	Supplies & Materials			$20,000			$20,000
700	Property			$93,250			$93,250
800	Debt Service & Miscellaneous			$6,797			$6,797
	TOTAL EXPENDITURES			**$569,597**			**$569,597**
Excess or Deficiency of Revenues over Expenditures				**$32,903**			**$32,903**
Other Sources of Funding (5000 & 6000)				**$0**			**$0**
Net Asset Balance (Fund Balance)				**$32,903**			**$32,903**
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)				**5%**			**5%**
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)				**5%**			**5%**

CHARTER SCHOOL WORKSHEET

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

Custom Class Charter School

	Max Autorized Enrollment	Rating Factor	WPU Generated
Estimated enrollment (HDK)		0.55	0
Estimated enrollment (FDK)	40	0.9	36
Estimated enrollment (1-3)	120	0.9	108
Estimated enrollment (4-6)	120	0.9	108
Estimated enrollment (7-8)	80	0.99	79.2
Estimated enrollment (9-12)	40	1.2	48
Special Ed enrollment (1-12)	40		
Special Ed (Self-Contained)	4		
Number of Teachers (K-6)	8		
Number of Teachers (7-12)	7		
WPU Value	$4,494		
No. of Teachers (FTE) (CACTUS)	15		
School Administrators (CACTUS)	1		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	Weighted WPU * WPU value - $2/student	379.2000	$ 1,703,325
Professional Staff	0.071705	27.1905	122,194
Restricted Basic School:			
Special Ed--Add-on	10% of enrollment * WPU value	40.0000	179,760
Spec. Ed. Self-Contained	Average SpEd SC for charters Approx. 1%	4.0000	17,976
Special Ed-State Programs	(10% enrollment * $18.62 + $2,259 Base for EY), (Impact Aid $93.47* 10% of enrollment)	1.4963	6,724
Career and Technical Ed.		0.0000	
Student at Risk Add-on	Base 5 WPU +.125 WPU/ED + .0475 WPU/EL	22.3796	100,574
Class Size Reduction (K-8)	$424.60/student K-8	34.0130	152,854
Total WPU Programs		504.2794	$ 2,283,408
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	$1.875/Total WPU		$ 946
Charter Funding Base	Greater of $40K or $115/student		46,000
Focus Populations			
Enhancement for Accelerated Students G&T	$9.93/student grade K-8		3,575
Enhancement for Accelerated Students AP & IB			
Other			
School Land Trust Program	Base $50,252.48 or $149.53/student		59,812
Grants for Professional Learning			
Educator Professional Time	$1,929.50/Teacher FTE		28,943
TSSA	$210.17/Total WPU		105,984
Student Health & Counseling	$25,000 Base + $30.0383/student		37,015
Digital Teaching and Learning	$20.97/student		8,388
Educator Salary Adjustment (ESA)	$8,904 + Benefits/Teacher FTE		170,149
ESA-School Administrators	$2,500 + Benefits/Admin FTE		3,104
Teacher Supplies and Material	$500/K-6 FTE, $250/7-12 FTE		5,750
Local Replacement Dollars	Average $3,317 per student		1,340,068
Total Non-WPU			$ 1,809,733
ESTIMATED Total All State Funding			**$ 4,093,141**

CHARTER SCHOOL WORKSHEET

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

Custom Class Charter School

	Break Even Enrollment	Rating Factor	WPU Generated
Estimated enrollment (HDK)		0.55	0
Estimated enrollment (FDK)	20	0.9	18
Estimated enrollment (1-3)	58	0.9	52.2
Estimated enrollment (4-6)	58	0.9	52.2
Estimated enrollment (7-8)	40	0.99	39.6
Estimated enrollment (9-12)	20	1.2	24
Special Ed enrollment (1-12)	19.6		
Special Ed (Self-Contained)	1.96		
Number of Teachers (K-6)	3		
Number of Teachers (7-12)	6		
WPU Value	$4,494		
No. of Teachers (FTE) (CACTUS)	9		
School Administrators (CACTUS)	1		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	Weighted WPU * WPU value - $2/student	186.0000	$ 835,492
Professional Staff	0.071705	13.3371	59,937
Restricted Basic School:			
Special Ed--Add-on	10% of enrollment * WPU value	19.6000	88,082
Spec. Ed. Self-Contained	Average SpEd SC for charters Approx. 1%	1.9600	8,808
Special Ed-State Programs	(10% enrollment * $18.62 + $2,259 Base for EY), (Impact Aid $93.47* 10% of enrollment)	0.9895	4,447
Career and Technical Ed.		0.0000	
Student at Risk Add-on	Base 5 WPU +.125 WPU/ED + .0475 WPU/EL	13.5160	60,741
Class Size Reduction (K-8)	$424.60/student K-8	16.6286	74,729
Total WPU Programs		250.0712	$ 1,132,236
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	$1.875/Total WPU		$ 469
Charter Funding Base	Greater of $40K or $115/student		40,000
Focus Populations			
Enhancement for Accelerated Students G&T	$9.93/student grade K-8		1,748
Enhancement for Accelerated Students AP & IB			
Other			
School Land Trust Program	Base $50,252.48 or $149.53/student		50,252
Grants for Professional Learning			
Educator Professional Time	$1,929.50/Teacher FTE		17,366
TSSA	$210.17/Total WPU		52,557
Student Health & Counseling	$25,000 Base + $30.0383/student		30,888
Digital Teaching and Learning	$20.97/student		4,110
Educator Salary Adjustment (ESA)	$8,904 + Benefits/Teacher FTE		102,089
ESA-School Administrators	$2,500 + Benefits/Admin FTE		3,104
Teacher Supplies and Material	$500/K-6 FTE, $250/7-12 FTE		3,000
Local Replacement Dollars	Average $3,317 per student		656,633
Total Non-WPU			$ 962,216
ESTIMATED Total All State Funding			**$ 2,094,453**

Custom Class Charter School		FY 2026-27					
First Operational Year		**100% Enrollment**			**Breakeven Enrollment**		
Number of Students:		400			196		
Grade Configuration:		K-12			K-12		
Revenue							
Food Services Sales to Students		0	$0		0	$0	
Student Activities							
Contributions and Donations from Private Sources:							
Source(s) (*specify)*		$0			$0		
Miscellaneous		$0			$0		
Total Revenue From Local Sources (1000)		**$0**			**$0**		
Estimated Total All State Funding		$ 4,093,140.99			$ 2,094,452.65		
Charter School Revolving Loan							
Charter School Startup and Implementation Grant		$96,250			$96,250		
Total Revenue from State Sources (3000)		**$4,189,391**			**$2,190,703**		
Federal Child Nutrition Program		400	$167,040		196	$79,733	
Restricted Federal Grants-in-Aid Received via USBE (IDEA)		$61,376			$30,074		
Federal Elementary and Secondary Education Act of 1965 (ESEA)		$59,964			$29,382		
Total Revenue from Federal Sources (4000)		**$121,340**			**$59,457**		
Loan Poceeds (other than revoving loan)		$0			$0		
Commercial		$0			$0		
Other *(specify)*		$0			$0		
Budget from Surplus (For Budgeting Purposes Only)		$0			$0		
Total Revenue from Other Sources & Changes (5000 & 6000)		**$0**			**$0**		
Total Revenue		**$4,310,731**			**$2,250,159**		
Expenditures		**Number**	**Salary/Cost**	**Total**	**Number**	**Salary/Cost**	**Total**
--- SALARIES ---							
10.131	Salaries - Teachers	15.00	$58,000	$870,000	9.00	$58,000	$522,000
10.132	Salaries - Substitute Teachers	0.00	$0	$0	0.00	$0	$0
10.161	Salaries - Teacher Aides and Paraprofessionals	5.00	$35,000	$175,000	2.00	$35,000	$70,000
10.198	Salaries - Other Classified Personnel	0.00	$0	$0	0.00	$0	$0
	Total **10 (1000)-INSTRUCTION** Salaries (100)			**$1,045,000**			**$592,000**
21.141	Salaries - Attendance and Social Work Personnel	0.00	$0	$0	0.00	$0	$0
21.142	Salaries - Guidance Personnel	1.00	$58,000	$58,000	1.00	$58,000	$58,000
21.143	Salaries - Health Services Personnel	0.00	$0	$0	0.00	$0	$0
21.144	Salaries - Psychological Personnel	0.00	$0	$0	0.00	$0	$0
21.152	Salaries - Secretarial and Clerical	0.00	$0	$0	0.00	$0	$0
21.198	Salaries - Other Classified Personnel	5.00	$35,000	$175,000	2.00	$35,000	$70,000
	Total - STUDENT SUPPORT Salaries (100)			**$233,000**			**$128,000**
22.145	Salaries - Licensed Media Personnel	0.00	$0	$0	0.00	$0	$0
22.162	Salaries - Non-licensed Media Personnel	0.00	$0	$0	0.00	$0	$0
22.198	Salaries - Other Classified Personnel	0.00	$0	$0	0.00	$0	$0
	Total - **INSTRUCTIONAL STAFF SUPPORT** Salaries (100)			**$0**			**$0**
24.121	Salaries Principals and assistant principals	1.00	$145,000	$145,000	1.00	$145,000	$145,000
24.152	Salaries - Secretarial and Clerical Personnel	2.00	$40,000	$80,000	2.00	$40,000	$80,000
24.198	Salaries - Other Classified Personnel	1.00	$75,000	$75,000	1.00	$75,000	$75,000
	Total **-SCHOOL ADMINISTRATION** Salaries (100)			**$300,000**			**$300,000**
26.181	Salaries - Operation & Maintenance Supervisors	0.00	$0	$0	0.00	$0	$0
26.182	Salaries - Custodial & Maintenance Personnel	0.00	$0	$0	0.00	$0	$0
	Total **-OPERATION & MAINT OF FACILITIES** Salaries (100)			**$0**			**$0**
31.191	Salaries - Food Services Personnel	0.00	$0	$0	0.00	$0	$0
	Total **-FOOD SERVICES** Salaries (100)			**$0**			**$0**
	TOTAL - SALARIES (100)			**$1,578,000**			**$1,020,000**
--- EMPLOYEE BENEFITS ---							
10.210	State Retirement - Instruction	5%	$1,045,000	$52,250	5%	$592,000	$29,600
21.210	State Retirement - Student Support	5%	$233,000	$11,650	5%	$128,000	$6,400
22.210	State Retirement - Instructional Staff Support	5%	$0	$0	5%	$0	$0
24.210	State Retirement - School Administration	5%	$300,000	$15,000	5%	$300,000	$15,000
26.210	State Retirement - Operation & Main of Facilities	5%	$0	$0	5%	$0	$0
31.210	State Retirement - Food Services	5%	$0	$0	5%	$0	$0
	Total - State Retirement			**$78,900**			**$51,000**
10.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$1,045,000	$104,500	10%	$592,000	$59,200
21.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$233,000	$23,300	10%	$128,000	$12,800
22.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$0	$0	10%	$0	$0
24.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$300,000	$30,000	10%	$300,000	$30,000
26.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$0	$0	10%	$0	$0

31.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$0	$0	10%	$0	$0
	Total - Social Security Contributions/Workers' Compensation/Unemployment Insurance			**$157,800**			**$102,000**
10.240	Medical Insurance/Dental Insurance/Group Life - Instruction	15%	$1,045,000	$156,750	15%	$592,000	$88,800
21.240	Medical Insurance/Dental Insurance/Group Life - Student Support	15%	$233,000	$34,950	15%	$128,000	$19,200
22.240	Medical Insurance/Dental Insurance/Group Life - Instructional Staff Su	15%	$0	$0	15%	$0	$0
24.240	Medical Insurance/Dental Insurance/Group Life - School Administratio	15%	$300,000	$45,000	15%	$300,000	$45,000
26.240	Medical Insurance/Dental Insurance/Group Life - Operation & Mainten	15%	$0	$0	15%	$0	$0
31.240	Medical Insurance/Dental Insurance/Group Life - Food Services	15%	$0	$0	15%	$0	$0
	Total- Medical Insurance/Dental Insurance/Group Life			**$236,700**			**$153,000**
10.290	Other Employee Benefits *(specify)* - Instruction	0%	$1,045,000	$0	0%	$592,000	$0
21.290	Other EmployeeBenefits *(specify)* - Student Support	0%	$233,000	$0	0%	$128,000	$0
22.290	Other Employee Benefits (specify) - Instructional Staff Support	0%	$0	$0	0%	$0	$0
24.290	Other Employee Benefits *(specify)* - School Administration	0%	$300,000	$0	0%	$300,000	$0
26.290	Other Employee Benefits *(specify)* - Operation & Maintenance of Facil	0%	$0	$0	0%	$0	$0
31.290	Other Employee Benefits *(specify)* - Food Services	0%	$0	$0	0%	$0	$0
	Total - Other Employee Benefits			**$0**			**$0**
	TOTAL EMPLOYEE BENEFITS (200)			**$473,400**			**$306,000**
	--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---						
10.300	Purchased Prof & Tech Services - Instruction	400.00	$1,000	$400,000	196.00	$1,000	$120,000
21.300	Purchased Prof & Tech Services - Student Support	1.00	$50,000	$50,000	1.00	$50,000	$50,000
22.300	Purchased Prof & Tech Services - Instructional Staff Support	1.00	$15,000	$15,000	1.00	$15,000	$15,000
24.300	Purchased Prof & Tech Services - School Administration	1.00	$15,000	$15,000	1.00	$15,000	$15,000
26.300	Purchased Prof & Tech Services - Operation & Maintenance of Facilitie	1.00	$10,000	$10,000	1.00	$10,000	$10,000
31.300	Purchased Prof & Tech Services - Food Services			$0			$0
	TOTAL - PURCHASED PROFESSIONAL & TECHNICAL SERVICES (300)			**$490,000**			**$210,000**
	--- PURCHASED PROPERTY SERVICES ---						
26.400	Purchased Property Services			$0			$0
26.441	Rental of Land & Buildings	2.00	$50,000	$100,000	1.00	$50,000	$50,000
26.450	Construction Services			$0			$0
	TOTAL - PURCHASED PROPERTY SERVICES (400)			**$100,000**			**$50,000**
	--- OTHER PURCHASED SERVICES ---						
27.510	Student Transportation Services (To/From School)			$0			$0
24.520	Insurance (other than employee benefits - e.g. D&O)			$30,000			$30,000
45.521	Property Insurance	**2.00**	$5,000	$10,000	**1.00**	$5,000	$5,000
45.522	Liability Insurance			$10,000			$10,000
10.530	Communication (telephone and other) - Instructional			$5,000			$5,000
21.530	Communication (telephone and other) - Student Support			$0			$0
24.530	Communication (telephone and other) - School Administation			$3,000			$3,000
26.530	Communication (telephone and other) - Operation and Maintenance of			$0			$0
24.540	Advertising			$25,000			$25,000
10.550	Printing and Binding - Instruction			$3,000			$3,000
21.550	Printing and Binding - Student Support			$0			$0
24.550	Printing and Binding - School Administration			$1,000			$1,000
10.560	Tuition			$0			$0
21.570	Food Service Management			$0			$0
21.580	Staff Travel/Per Diem - Student Support			$1,000			$1,000
24.580	Staff Travel/Per Diem - School Administration			$3,000			$3,000
26.580	Staff Travel/Per Diem - Operation and Maintenance of Facilities			$0			$0
10.590	Inter-educational, Interagency Purchased Services			$0			$0
	TOTAL - OTHER PURCHASED SERVICES (500)			**$91,000**			**$86,000**
	--- SUPPLIES & MATERIALS---						
10.600	Supplies & Materials - Instruction	400	$500	$200,000	196	$500	$98,000
10.641	Textbooks	400	$50	$20,000	196	$50	$9,800
21.600	Supplies & Materials - Student Support	400	$100	$40,000	196	$100	$19,600
22.640	Books and Periodicals	0	$0	$0	0	$0	$0
22.644	Library Books	0	$0	$0	0	$0	$0
24.600	Supplies & Materials - School Administration	1	$10,000	$10,000	1	$10,000	$10,000
26.600	Supplies & Materials - Operation & Maintenance of Facilities	1	$10,000	$10,000	1	$10,000	$10,000
31.600	Supplies & Materials - Food Service	0	$0	$0	0	$0	$0
31.630	Food - Food Service			$0			$0
	TOTAL - SUPPLIES & MATERIALS (600)			**$280,000**			**$147,400**
	--- PROPERTY ---						
10.700	Property - Instruction	**400.00**	$750	$300,000	196.00	$750	$147,000
21.700	Property - Student Support	**26.00**	$2,000	$52,000	14.00	$2,000	$28,000
24.700	Property - School Administration	**4.00**	$2,000	$8,000	4	$2,000	$8,000
26.700	Property - Operation & Maintenance of Facilities			$0			$0

31.700	Property - Food Services			$0			$0
31.790	Depreciation and Amortization (Kitchen Equipment)	$ -	7	$0	$ -	7	$0
49.710	Land and Site Improvements			$0			$0
49.720	Buildings			$0			$0
27.732	School Buses			$0			$0
10.733	Furniture and Fixtures - Instruction	**2.00**	$25,000	$50,000	**1.00**	$25,000	$25,000
21.733	Furniture and Fixtures - Student Support			$0			$0
24.733	Furniture and Fixtures - School Administration	**2.00**	$10,000	$20,000	**1.00**	$10,000	$10,000
10.734	Technology Related Hardware - Instruction			$0			$0
21.734	Technology Related Hardware - Student Support			$0			$0
24.734	Technology Related Hardware - School Administration			$0			$0
10.736	Technology Sofware - Instruction	**400.00**	$400	$160,000	196.00	$400	$78,400
21.736	Technology Sofware - Student Support	**26.00**	$50	$1,300	14.00	$50	$700
24.736	Technology Sofware - School Administration	**5.00**	$50	$200	4.00	$50	$200
27.735	Non-Bus Vehicles	**1.00**	$15,000	$15,000	0.00	$15,000	$0
10.739	Other Equipment - Instruction	**2.00**	$20,000	$40,000	1.00	$20,000	$20,000
21.739	Other Equipment - Student Support			$0			$0
24.739	Other Equipment - School Administration			$0			$0
	TOTAL - PROPERTY (700)			**$646,500**			**$317,300**
	--- DEBT SERVICE & MISCELLANEOUS ---						
10.890	Miscellaneous Expenditures - Instuction			$0			$0
21.890	Miscellaneous Expenditures- Student Support			$0			$0
24.890	Miscellaneous Expenditures- School Administration - Closure Reserve Fund			$0			$0
26.890	Miscellaneous Expenditures - Operation & Maintenance of Facilities			$0			$0
31.890	Miscellaneous Expenditures - Food Services			$0			$0
45.890	Miscellaneous Expenditures - Facilities, Acquisition, & Constructuon Services			$0			$0
10.810	Dues & Fees - Instruction			$0			$0
21.810	Dues & Fees - Student Support			$0			$0
24.810	Dues & Fees -School Administration			$0			$0
26.810	Dues & Fees - Operation & Maintenance of Facilities			$0			$0
	Total - Miscellaneous			**$0**			**$0**
45.830	Interest on Debt			$6,797			$6,797
45.840	Redemption of Principal			$72,165			$0
	Total Debt Service			**$78,962**			**$6,797**
	TOTAL - DEBT SERVICE & MISCELLANEOUS (800)			**$78,962**			**$6,797**
	Total Expenditures		**$3,737,862**			**$2,143,497**	

1000	Local			$0			$0
3000	State			$4,189,391			$2,190,703
4000	Federal			$121,340			$59,457
	TOTAL REVENUES			**$4,310,731**			**$2,250,159**
100	Salaries			$1,578,000			$1,020,000
200	Employee Benefits			$473,400			$306,000
300	Purchased Professional &Technical Services			$490,000			$210,000
400	Purchased Property Services			$100,000			$50,000
500	Other Purchased Services			$91,000			$86,000
600	Supplies & Materials			$280,000			$147,400
700	Property			$646,500			$317,300
800	Debt Service & Miscellaneous			$78,962			$6,797
	TOTAL EXPENDITURES			**$3,737,862**			**$2,143,497**
Excess or Deficiency of Revenues over Expenditures				**$572,869**			**$106,662**
Other Sources of Funding (5000 & 6000)				**$0**			**$0**
Net Asset Balance (Fund Balance)				**$572,869**			**$106,662**
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)				**13%**			**5%**
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)				**13%**			**5%**

CHARTER SCHOOL WORKSHEET

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

Custom Class Charter School

	Max Autorized Enrollment	Rating Factor	WPU Generated
Estimated enrollment (HDK)		0.55	0
Estimated enrollment (FDK)	50	0.9	45
Estimated enrollment (1-3)	150	0.9	135
Estimated enrollment (4-6)	150	0.9	135
Estimated enrollment (7-8)	100	0.99	99
Estimated enrollment (9-12)	110	1.2	132
Special Ed enrollment (1-12)	56		
Special Ed (Self-Contained)	5.6		
Number of Teachers (K-6)	8		
Number of Teachers (7-12)	7		
WPU Value	$4,494		
No. of Teachers (FTE) (CACTUS)	20		
School Administrators (CACTUS)	1		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	Weighted WPU * WPU value - $2/student	546.0000	$ 2,452,604
Professional Staff	0.071705	39.1509	175,944
Restricted Basic School:			
Special Ed--Add-on	10% of enrollment * WPU value	56.0000	251,664
Spec. Ed. Self-Contained	Average SpEd SC for charters Approx. 1%	5.6000	25,166
Special Ed-State Programs	(10% enrollment * $18.62 + $2,259 Base for EY), (Impact Aid $93.47* 10% of enrollment)	1.8937	8,510
Career and Technical Ed.		0.0000	
Student at Risk Add-on	Base 5 WPU +.125 WPU/ED + .0475 WPU/EL	29.3314	131,815
Class Size Reduction (K-8)	$424.60/student K-8	42.5163	191,068
Total WPU Programs		714.8923	$ 3,236,773
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	$1.875/Total WPU		$ 1,340
Charter Funding Base	Greater of $40K or $115/student		64,400
Focus Populations			
Enhancement for Accelerated Students G&T	$9.93/student grade K-8		4,469
Enhancement for Accelerated Students AP & IB			
Other			
School Land Trust Program	Base $50,252.48 or $149.53/student		83,737
Grants for Professional Learning			
Educator Professional Time	$1,929.50/Teacher FTE		38,590
TSSA	$210.17/Total WPU		150,249
Student Health & Counseling	$25,000 Base + $30.0383/student		41,821
Digital Teaching and Learning	$20.97/student		11,743
Educator Salary Adjustment (ESA)	$8,904 + Benefits/Teacher FTE		226,865
ESA-School Administrators	$2,500 + Benefits/Admin FTE		3,104
Teacher Supplies and Material	$500/K-6 FTE, $250/7-12 FTE		5,750
Local Replacement Dollars	Average $3,317 per student		1,876,095
Total Non-WPU			$ 2,508,164
ESTIMATED Total All State Funding			**$ 5,744,936**

CHARTER SCHOOL WORKSHEET

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

Custom Class Charter School

	Break Even Enrollment	Rating Factor	WPU Generated
Estimated enrollment (HDK)		0.55	0
Estimated enrollment (FDK)	25	0.9	22.5
Estimated enrollment (1-3)	70	0.9	63
Estimated enrollment (4-6)	70	0.9	63
Estimated enrollment (7-8)	50	0.99	49.5
Estimated enrollment (9-12)	25	1.2	30
Special Ed enrollment (1-12)	24		
Special Ed (Self-Contained)	2.4		
Number of Teachers (K-6)	3		
Number of Teachers (7-12)	6		
WPU Value	$4,494		
No. of Teachers (FTE) (CACTUS)	9		
School Administrators (CACTUS)	1		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	Weighted WPU * WPU value - $2/student	228.0000	$ 1,024,152
Professional Staff	0.071705	16.3487	73,471
Restricted Basic School:			
Special Ed--Add-on	10% of enrollment * WPU value	24.0000	107,856
Spec. Ed. Self-Contained	Average SpEd SC for charters Approx. 1%	2.4000	10,786
Special Ed-State Programs	(10% enrollment * $18.62 + $2,259 Base for EY), (Impact Aid $93.47* 10% of enrollment)	1.0988	4,938
Career and Technical Ed.		0.0000	
Student at Risk Add-on	Base 5 WPU +.125 WPU/ED + .0475 WPU/EL	15.4278	69,332
Class Size Reduction (K-8)	$424.60/student K-8	20.3133	91,288
Total WPU Programs		305.1887	$ 1,381,823
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	$1.875/Total WPU		$ 572
Charter Funding Base	Greater of $40K or $115/student		40,000
Focus Populations			
Enhancement for Accelerated Students G&T	$9.93/student grade K-8		2,135
Enhancement for Accelerated Students AP & IB			
Other			
School Land Trust Program	Base $50,252.48 or $149.53/student		50,252
Grants for Professional Learning			
Educator Professional Time	$1,929.50/Teacher FTE		17,366
TSSA	$210.17/Total WPU		64,141
Student Health & Counseling	$25,000 Base + $30.0383/student		32,209
Digital Teaching and Learning	$20.97/student		5,033
Educator Salary Adjustment (ESA)	$8,904 + Benefits/Teacher FTE		102,089
ESA-School Administrators	$2,500 + Benefits/Admin FTE		3,104
Teacher Supplies and Material	$500/K-6 FTE, $250/7-12 FTE		3,000
Local Replacement Dollars	Average $3,317 per student		804,041
Total Non-WPU			$ 1,123,943
ESTIMATED Total All State Funding			**$ 2,505,766**

Custom Class Charter School		FY 2027-28					
Second Operational Year		**100% Enrollment**			**Breakeven Enrollment**		
Number of Students:		560			240		
Grade Configuration:		K-12			K-12		
Revenue							
Food Services Sales to Students		0	$0		0	$0	
Student Activities							
Contributions and Donations from Private Sources:							
Source(s) (*specify)*		$0			$0		
Miscellaneous		$0			$0		
Total Revenue From Local Sources (1000)		**$0**			**$0**		
Estimated Total All State Funding		$ 5,744,936.07			$ 2,505,766.12		
Charter School Revolving Loan							
Charter School Startup and Implementation Grant							
Total Revenue from State Sources (3000)		**$5,744,936**			**$2,505,766**		
Federal Child Nutrition Program		560	$233,856		240	$97,632	
Restricted Federal Grants-in-Aid Received via USBE (IDEA)		$85,926			$36,826		
Federal Elementary and Secondary Education Act of 1965 (ESEA)		$83,950			$35,978		
Total Revenue from Federal Sources (4000)		**$169,876**			**$72,804**		
Loan Poceeds (other than revoving loan)		$0			$0		
Commercial		$0			$0		
Other *(specify)*		$0			$0		
Budget from Surplus (For Budgeting Purposes Only)		$0			$0		
Total Revenue from Other Sources & Changes (5000 & 6000)		**$0**			**$0**		
Total Revenue		**$5,914,812**			**$2,578,570**		
Expenditures		**Number**	**Salary/Cost**	**Total**	**Number**	**Salary/Cost**	**Total**
--- SALARIES ---							
10.131	Salaries - Teachers	20.00	$58,000	$1,160,000	11.00	$58,000	$638,000
10.132	Salaries - Substitute Teachers	0.00	$0	$0	0.00	$0	$0
10.161	Salaries - Teacher Aides and Paraprofessionals	7.00	$35,000	$245,000	2.00	$35,000	$70,000
10.198	Salaries - Other Classified Personnel	0.00	$0	$0	0.00	$0	$0
	Total **10 (1000)-INSTRUCTION** Salaries (100)			**$1,405,000**			**$708,000**
21.141	Salaries - Attendance and Social Work Personnel	0.00	$0	$0	0.00	$0	$0
21.142	Salaries - Guidance Personnel	1.50	$58,000	$87,000	1.00	$58,000	$58,000
21.143	Salaries - Health Services Personnel	0.00	$0	$0	0.00	$0	$0
21.144	Salaries - Psychological Personnel	0.00	$0	$0	0.00	$0	$0
21.152	Salaries - Secretarial and Clerical	0.00	$0	$0	0.00	$0	$0
21.198	Salaries - Other Classified Personnel	6.00	$35,000	$210,000	2.00	$35,000	$70,000
	Total - STUDENT SUPPORT Salaries (100)			**$297,000**			**$128,000**
22.145	Salaries - Licensed Media Personnel	0.00	$0	$0	0.00	$0	$0
22.162	Salaries - Non-licensed Media Personnel	0.00	$0	$0	0.00	$0	$0
22.198	Salaries - Other Classified Personnel	0.00	$0	$0	0.00	$0	$0
	Total - **INSTRUCTIONAL STAFF SUPPORT** Salaries (100)			**$0**			**$0**
24.121	Salaries Principals and assistant principals	1.00	$145,000	$145,000	1.00	$145,000	$145,000
24.152	Salaries - Secretarial and Clerical Personnel	3.00	$40,000	$120,000	2.00	$40,000	$80,000
24.198	Salaries - Other Classified Personnel	1.00	$75,000	$75,000	1.00	$75,000	$75,000
	Total **-SCHOOL ADMINISTRATION** Salaries (100)			**$340,000**			**$300,000**
26.181	Salaries - Operation & Maintenance Supervisors	0.00	$0	$0	0.00	$0	$0
26.182	Salaries - Custodial & Maintenance Personnel	0.00	$0	$0	0.00	$0	$0
	Total **-OPERATION & MAINT OF FACILITIES** Salaries (100)			**$0**			**$0**
31.191	Salaries - Food Services Personnel	0.00	$0	$0	0.00	$0	$0
	Total **-FOOD SERVICES** Salaries (100)			**$0**			**$0**
	TOTAL - SALARIES (100)			**$2,042,000**			**$1,136,000**
--- EMPLOYEE BENEFITS ---							
10.210	State Retirement - Instruction	5%	$1,405,000	$70,250	5%	$708,000	$35,400
21.210	State Retirement - Student Support	5%	$297,000	$14,850	5%	$128,000	$6,400
22.210	State Retirement - Instructional Staff Support	5%	$0	$0	5%	$0	$0
24.210	State Retirement - School Administration	5%	$340,000	$17,000	5%	$300,000	$15,000
26.210	State Retirement - Operation & Main of Facilities	5%	$0	$0	5%	$0	$0
31.210	State Retirement - Food Services	5%	$0	$0	5%	$0	$0
	Total - State Retirement			**$102,100**			**$56,800**
10.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$1,405,000	$140,500	10%	$708,000	$70,800
21.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$297,000	$29,700	10%	$128,000	$12,800
22.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$0	$0	10%	$0	$0
24.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$340,000	$34,000	10%	$300,000	$30,000
26.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$0	$0	10%	$0	$0

31.220	Social Security Contributions/Workers' Compensation/Unemployment I	10%	$0	$0	10%	$0	$0
	Total - Social Security Contributions/Workers' Compensation/Unemployment Insurance			**$204,200**			**$113,600**
10.240	Medical Insurance/Dental Insurance/Group Life - Instruction	15%	$1,405,000	$210,750	15%	$708,000	$106,200
21.240	Medical Insurance/Dental Insurance/Group Life - Student Support	15%	$297,000	$44,550	15%	$128,000	$19,200
22.240	Medical Insurance/Dental Insurance/Group Life - Instructional Staff Su	15%	$0	$0	15%	$0	$0
24.240	Medical Insurance/Dental Insurance/Group Life - School Administratio	15%	$340,000	$51,000	15%	$300,000	$45,000
26.240	Medical Insurance/Dental Insurance/Group Life - Operation & Mainten	15%	$0	$0	15%	$0	$0
31.240	Medical Insurance/Dental Insurance/Group Life - Food Services	15%	$0	$0	15%	$0	$0
	Total- Medical Insurance/Dental Insurance/Group Life			**$306,300**			**$170,400**
10.290	Other Employee Benefits *(specify)* - Instruction	0%	$1,405,000	$0	0%	$708,000	$0
21.290	Other EmployeeBenefits *(specify)* - Student Support	0%	$297,000	$0	0%	$128,000	$0
22.290	Other Employee Benefits (specify) - Instructional Staff Support	0%	$0	$0	0%	$0	$0
24.290	Other Employee Benefits *(specify)* - School Administration	0%	$340,000	$0	0%	$300,000	$0
26.290	Other Employee Benefits *(specify)* - Operation & Maintenance of Facil	0%	$0	$0	0%	$0	$0
31.290	Other Employee Benefits *(specify)* - Food Services	0%	$0	$0	0%	$0	$0
	Total - Other Employee Benefits			**$0**			**$0**
	TOTAL EMPLOYEE BENEFITS (200)			**$612,600**			**$340,800**
	--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---						
10.300	Purchased Prof & Tech Services - Instruction	560.00	$1,000	$560,000	240.00	$1,000	$120,000
21.300	Purchased Prof & Tech Services - Student Support	1.00	$50,000	$50,000	1.00	$50,000	$50,000
22.300	Purchased Prof & Tech Services - Instructional Staff Support	1.00	$15,000	$15,000	1.00	$15,000	$15,000
24.300	Purchased Prof & Tech Services - School Administration	1.00	$15,000	$15,000	1.00	$15,000	$15,000
26.300	Purchased Prof & Tech Services - Operation & Maintenance of Facilitie	1.00	$10,000	$10,000	1.00	$10,000	$10,000
31.300	Purchased Prof & Tech Services - Food Services			$0			$0
	TOTAL - PURCHASED PROFESSIONAL & TECHNICAL SERVICES (300)			**$650,000**			**$210,000**
	--- PURCHASED PROPERTY SERVICES ---						
26.400	Purchased Property Services			$0			$0
26.441	Rental of Land & Buildings	3.00	$50,000	$150,000	1.00	$50,000	$50,000
26.450	Construction Services			$0			$0
	TOTAL - PURCHASED PROPERTY SERVICES (400)			**$150,000**			**$50,000**
	--- OTHER PURCHASED SERVICES ---						
27.510	Student Transportation Services (To/From School)			$0			$0
24.520	Insurance (other than employee benefits - e.g. D&O)			$30,000			$30,000
45.521	Property Insurance	**3.00**	$5,000	$15,000	**1.00**	$5,000	$5,000
45.522	Liability Insurance			$10,000			$10,000
10.530	Communication (telephone and other) - Instructional			$5,000			$5,000
21.530	Communication (telephone and other) - Student Support			$0			$0
24.530	Communication (telephone and other) - School Administation			$3,000			$3,000
26.530	Communication (telephone and other) - Operation and Maintenance of			$0			$0
24.540	Advertising			$25,000			$25,000
10.550	Printing and Binding - Instruction			$3,000			$3,000
21.550	Printing and Binding - Student Support			$0			$0
24.550	Printing and Binding - School Administration			$1,000			$1,000
10.560	Tuition			$0			$0
21.570	Food Service Management			$0			$0
21.580	Staff Travel/Per Diem - Student Support			$1,000			$1,000
24.580	Staff Travel/Per Diem - School Administration			$3,000			$3,000
26.580	Staff Travel/Per Diem - Operation and Maintenance of Facilities			$0			$0
10.590	Inter-educational, Interagency Purchased Services			$0			$0
	TOTAL - OTHER PURCHASED SERVICES (500)			**$96,000**			**$86,000**
	--- SUPPLIES & MATERIALS---						
10.600	Supplies & Materials - Instruction	560	$500	$280,000	240	$500	$120,000
10.641	Textbooks	560	$50	$28,000	240	$50	$12,000
21.600	Supplies & Materials - Student Support	560	$100	$56,000	240	$100	$24,000
22.640	Books and Periodicals	0	$0	$0	0	$0	$0
22.644	Library Books	0	$0	$0	0	$0	$0
24.600	Supplies & Materials - School Administration	1	$10,000	$10,000	1	$10,000	$10,000
26.600	Supplies & Materials - Operation & Maintenance of Facilities	1	$10,000	$10,000	1	$10,000	$10,000
31.600	Supplies & Materials - Food Service	0	$0	$0	0	$0	$0
31.630	Food - Food Service			$0			$0
	TOTAL - SUPPLIES & MATERIALS (600)			**$384,000**			**$176,000**
	--- PROPERTY ---						
10.700	Property - Instruction	**560.00**	$750	$420,000	240.00	$750	$180,000
21.700	Property - Student Support	**34.00**	$2,000	$68,000	16.00	$2,000	$28,000
24.700	Property - School Administration	**5.00**	$2,000	$10,000	4	$2,000	$10,000
26.700	Property - Operation & Maintenance of Facilities			$0			$0

31.700	Property - Food Services			$0			$0
31.790	Depreciation and Amortization (Kitchen Equipment)	$ -	7	$0	$ -	7	$0
49.710	Land and Site Improvements			$0			$0
49.720	Buildings			$0			$0
27.732	School Buses			$0			$0
10.733	Furniture and Fixtures - Instruction	**3.00**	$25,000	$50,000	**1.00**	$25,000	$25,000
21.733	Furniture and Fixtures - Student Support			$0			$0
24.733	Furniture and Fixtures - School Administration	**3.00**	$10,000	$30,000	**1.00**	$10,000	$10,000
10.734	Technology Related Hardware - Instruction			$0			$0
21.734	Technology Related Hardware - Student Support			$0			$0
24.734	Technology Related Hardware - School Administration			$0			$0
10.736	Technology Sofware - Instruction	**560.00**	$400	$224,000	240.00	$400	$96,000
21.736	Technology Sofware - Student Support	**34.00**	$50	$1,700	16.00	$50	$800
24.736	Technology Sofware - School Administration	**5.00**	$50	$250	4.00	$50	$200
27.735	Non-Bus Vehicles	**1.00**	$15,000	$15,000	0.00	$15,000	$0
10.739	Other Equipment - Instruction	**3.00**	$20,000	$60,000	1.00	$20,000	$20,000
21.739	Other Equipment - Student Support			$0			$0
24.739	Other Equipment - School Administration			$0			$0
	TOTAL - PROPERTY (700)			**$878,950**			**$370,000**
	--- DEBT SERVICE & MISCELLANEOUS ---						
10.890	Miscellaneous Expenditures - Instuction			$0			$0
21.890	Miscellaneous Expenditures- Student Support			$0			$0
24.890	Miscellaneous Expenditures- School Administration - Closure Reserve Fund			$0			$0
26.890	Miscellaneous Expenditures - Operation & Maintenance of Facilities			$0			$0
31.890	Miscellaneous Expenditures - Food Services			$0			$0
45.890	Miscellaneous Expenditures - Facilities, Acquisition, & Constructuon Services			$0			$0
10.810	Dues & Fees - Instruction			$0			$0
21.810	Dues & Fees - Student Support			$0			$0
24.810	Dues & Fees -School Administration			$0			$0
26.810	Dues & Fees - Operation & Maintenance of Facilities			$0			$0
	Total - Miscellaneous			**$0**			**$0**
45.830	Interest on Debt			$6,797			$6,797
45.840	Redemption of Principal			$72,165			$72,165
	Total Debt Service			**$78,962**			**$78,962**
	TOTAL - DEBT SERVICE & MISCELLANEOUS (800)			**$78,962**			**$78,962**
	Total Expenditures		**$4,892,512**			**$2,447,762**	

1000	Local			$0			$0
3000	State			$5,744,936			$2,505,766
4000	Federal			$169,876			$72,804
	TOTAL REVENUES			**$5,914,812**			**$2,578,570**
100	Salaries			$2,042,000			$1,136,000
200	Employee Benefits			$612,600			$340,800
300	Purchased Professional &Technical Services			$650,000			$210,000
400	Purchased Property Services			$150,000			$50,000
500	Other Purchased Services			$96,000			$86,000
600	Supplies & Materials			$384,000			$176,000
700	Property			$878,950			$370,000
800	Debt Service & Miscellaneous			$78,962			$78,962
	TOTAL EXPENDITURES			**$4,892,512**			**$2,447,762**
Excess or Deficiency of Revenues over Expenditures				**$1,022,300**			**$130,808**
Other Sources of Funding (5000 & 6000)				**$0**			**$0**
Net Asset Balance (Fund Balance)				**$1,022,300**			**$130,808**
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)				**17%**			**5%**
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)				**17%**			**5%**