

These Minutes are Pending Board Approval

Mission Statement: *“We are a community of learners. We will do whatever it takes to learn. We are building a strong foundation by believing we can, working our plan, then feeling the power of success.”*

George Washington Academy
Thursday, June 22, 2023
7:30 p.m.

Board Meeting Minutes

Location: George Washington Academy
2277 South 3000 East
St. George, Utah
Library

The Board Training was held at 7:00 p.m. prior to the Board Meeting.

The Board meeting convened at 7:30 p.m.

Board Welcome: Kevin Peterson, CFO

Roll Call: Kevin Peterson, CFO

Prayer: Kevin Peterson

Pledge of Allegiance: Holly Myers

Board Members Present: Kevin Peterson, Amanda Mortenson, Holly Myers and Shauna Mahoney. Shannon Greer, Casey Unrein, and Blake Clark attended via Zoom.

Others Present: Deborah Odenwalder, Debbie Kuavaka, Christine Giles, Kim Townes, Spencer Adams, Ayelen Butler and family.

Approval of Minutes: Amanda Mortenson motioned to approve the minutes from the May 18, 2023 Board Meeting as found in the board packet. Holly Myers seconded.. The motion passed. Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney voted in favor. Kevin Peterson refrained from voting as he wasn't in attendance at the May meeting.

Public Opportunity to Address the Board:

None

Set time for adjournment: Amanda Mortenson set time for adjournment at 8:45 p.m.

Administration Report: Christine Giles filled in for Blake Clark. Christine reports that all due reports have been completed and sent to the state as assigned by them. Christine highlighted

GWA's enrollment data, indicating that we are currently down in Kindergarten, 1st Grade is about the same. The highest retention is with 6th grade with a waitlist and Administration is hopeful that this will continue next year. Last year we had a smaller enrollment number for 4th grade which has resulted in a waitlist of zero for 5th grade. Administration recognized that the estimated student count may not be 1,060 as it typically goes down during the school year. Christine indicated that Administration thought that the enrollment numbers being seen in 6th and 7th grade are a result of the honor classes that GWA are going to offer next year. They have noticed that 50% of our student population in those grades have signed up for these honor classes and GWA has a great team of 6th and 7th grade teachers who are excited and knowledgeable so they will be able to add some rigor and depth in their instruction. Last week, Christine, Chance, and Steve oversaw the training of the new teachers. Day one was focused on adding rigor and stronger instructional practices to our Tier 1 instruction. A large part of the decision to focus on these things came from the review of our longitudinal data over the last 3 years on both ELA and Math. By reviewing the data it was clear that GWA needed to pivot and place more emphasis on Tier 1 instruction. In focusing more on Tier 1 instruction, it will allow for more in-depth learning. As it was discussed with the teachers and presented with a schedule that would support the additional focus on Tier 1, they seem to be really excited about it and respond. Admin will discuss this to see how it will look to implement extra rigor but it may include extra practice at home to support that. They will also be looking for ways to involve the parents. Amanda asked what is the game plan for getting parents involved and how are we going to track it pushing our higher achieving students. Christine reported that they will be monitoring data from the standard testing and other assessments in place through GWA data tracking spreadsheet. She also reported that though she'd have to verify with Blake Clark, she believed that all of this information will be communicated at the Back to School night with the parents so that everyone will have a clear understanding of what this increased rigor will look like in the classroom. Kevin requests that Christine relay to Blake that the Board will want him to report how this program is performing with the supporting data. Holly asks if Admin have considered allowing parents to opt in to a level of rigor. Christine reports that for the upper grades, they have offered the honor classes and then the grade level teams would meet to determine what that at home practice would look like and how that would be communicated to the parents. Admin will continue to work on that as they move forward so that they can present a clear plan to the board. Casey asked that with the plan having an increase in Tier 1 intervention, how will it affect the Patriot time and other intervention. Christine explained how the time in the day would break down in the day/week specifically Patriot time. As they shift the professional coaching and development, they want to ensure that the Tier 1 teaching practices are solid.

Moment of Appreciation: Kevin Peterson thanked Ayelen Butler for their service to GWA. Ayelen relayed to the board her appreciation for GWA and the board. Kevin also thanked Ayelen's family for their sacrifice. Board members gave their appreciation and thanks as well.

Financial Report: Spencer presented the financial report as of May 31, 2023 and noted that if the board had looked at the financial committee meeting minutes, they would have noticed that there were a lot of adjustments to the forecast. He reports that it is more typical now at the end of the year than any other point of the year due to the committee fine tuning the budget that is available for board approval tonight. So they are adjusting this forecast to a realistic but safe number to where the committee predicts GWA will end at Fiscal Year end. Spencer pointed out

the percentage of Forecast on the Budget report, noting that it is still primarily green. The goal is to be mindful to ensure that we do not have more expenses than what we have budgeted for. Spencer explained what would happen if we did have more expenses than what we have budgeted for. GWA's operating margin increased by 0.6%, service coverage increased by 0.05 and day cash on hand increased by 1 day compared to last month. Overall in a great position as we have been throughout the year. Everything is pointing to ending the year very healthy. The audit fund will start at the beginning of August. Casey requested that Spencer explain the Dividends/CapEx fund to the board. Spencer drew the Board's attention to where the board can find the CapEx fund in the board packet. Traditionally, GWA has placed \$150,000 plus carry over into that fund to build that fund up so when we have big projects or expenses come up we have the money to pay for it when we need to and not overspend it. Last year GWA put together a special project fund where anything above and beyond the \$350,000 required goes into the special project fund. Holly asked for examples of what would come out of the CapEx fund versus the special project fund. Spencer and Kevin gave examples and why those examples would qualify for each fund. Kevin explained why the CapEx funds are useful/necessary for the budget. Amanda asked what a Sweep means since Kevin used it and Kevin explained that it was the act of taking the excess being placed on a separate line to ensure saving to allow for us to stay within budget. Holly asked if it was an annual sweep and Kevin confirmed it. Holly asked if this was the first year of this line and Spencer and Kevin reported that it was added mid last year. Holly also asked if there are restrictions on the fund. Kevin explained how the fund restrictions work. Casey also explained that some expenses in that fund will also be an asset such as property improvements.

Committee Reports:

- **Policies Committee** – Nothing to report. Christine reports that there will be some state policies that will be adopted and the committee working on adopting those.
- **Finance Committee** – There will be some reports/budgets that will be addressed in the Action Items.
- **Benefits Committee** – Nothing to report. But good things are coming.
- **Curriculum Committee** – Christine has replaced LaNessa Stevens as the Chair and there is a new curriculum committee that comprises of 6th and 7th grade ELA teachers because next year's goal is to develop a new curriculum for those grade levels. One of the 7th grade teachers is coming from a secondary background so will be beneficial in finding the right curriculum for us.
- **Outreach Committee** – Nothing to report. Working on scheduling a meeting.
- **Technology Committee** – Nothing to report.
- **LAND Trust Committee** – Nothing to report.
- **PTO Committee** – Amanda presented the PTO End of Year Report/Audit and asked if there were any questions. Kevin asked about the "Must Spend" on the Budget. Amanda reports that Blake was aware of it and that Blake is working with the Librarian to utilize the fund in books as it needs to be used in literature. Teacher's are providing book recommendations to help supplement curriculum or things that are being discussed in the classroom. Kevin praised the Recommendation section in the report indicating that they made a ton of sense going forward. Kevin requested that there be a way to make it easier for the PTO board to get funds back that they raised when needed. Amanda will follow up with Sharon Moss, the PTO treasurer, for what they may recommend on facilitating

this request. Holly asked who is going to be responsible for carrying out the recommendations of the report. Amanda explained the steps that they are already addressing and that she's been in contact with the administration and they are working on the remaining. Specifically, they are looking at creating a procedure or process that would let teachers and/or staff know that funds should be requested from the school first and then brought to the PTO and that any requests will be considered against restrictions such as, "is it benefitting all students". Blake, via Zoom, reported that he had already met with Amber from the PTO and the current plan is that Amber will come to a faculty meeting and they will create an infographic flier to go forward. Amanda also reported that the new PTO board will start July 1st. Casey also advised that interest rates are up and that the PTO should look at getting some of these excess funds into a CD or something to get some of these funds working for the PTO. Amanda requests that Kevin or Chase sit down with the PTO treasurers to help them with figuring Casey's recommendation. Shannon praised the PTO Report/Audit in its entirety and noted it's the first time. She also indicated the report will set up future years to come.

- **Board Development Committee** – It has been discussed that we want to add another Board member and so Shannon asked that Board members reach out to parents in their influence and bring names to the July meeting. Shannon also stated that at the Board Retreat in July, the board will look at what the training will look like for the coming year. Holly asked if it would be better if the next member was selected in time for the July board meeting. Shannon agrees that it would be helpful and requests that Board members get their suggestions to her in the next couple of days. Amanda asked what skill sets the board should be looking for in their candidates. Shannon stated that in the past that she has appreciated an attorney, not to give legal advice, but for their experience in legaleze, local business owners, or parents that have marketing experience are who she's thought of. Kevin also stated that he appreciated JayCee's perspective coming from someone who had taught in the classroom. Shannon stated that someone that has children in the school would be ideal but not required. Shannon also gave suggestions on how to do the invite. Holly asked if there is a list of Board member responsibilities and expectations and the time commitment to provide to those that are interested. Shannon indicated that is possible but that she'll have to get back to her computer.
- **Campus Management Committee** – Nothing to report. Everything is in the packet for action items.

Discussion and/or Action Items:

- **Expenditures over \$5,000**
- **FY23 Final Budget Approval (Board Packet Pg. 42)** Holly motioned to approve the FY23 Final Budget as found in the Board Packet. Shauna seconded. The motion passed unanimously. All present voted in favor: Kevin Peterson, Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney.
- **FY24 Original FY24 Budget Approval (Board Packet Pg. 43)** Amanda motioned to approve Fiscal Year 24 Original Budget Approval as outlined in the board packet. Holly seconded. The motion passed unanimously. All present voted in favor: Kevin Peterson, Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney.

- **Special Education Policies and Procedures Manual Approval (Board Packet Pg. 47)** Holly motioned to accept the Special Education Policies and Procedures Manual as proposed in the board packet. Amanda seconded. Holly asked if this was a whole new packet or just an update. Kim Towne explained that the state released a new model and so GWA was required to adopt the new model. Kim also explained how the old model wasn't working and how the new model is going to be better and give a better representation. Holly asked how it will affect the number of students that will qualify for this model. Kim explains how the models will have similar numbers of qualifying students so the number will balance out. Any student that was receiving the previous services before but now does not qualify to start the new would have to be assessed to look at all the interventions that GWA can provide as a Tier level II intervention to show that they don't need special education. The motion passed unanimously. All present voted in favor: Kevin Peterson, Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney.
- **Renewal of the Mango Phone System (Board Packet Pg. 137)** Kevin reports that this is for year 2 on a 3 year contract. Shauna motioned to accept the bid from Mango for a new phone system as proposed and outlined in the board packet. Amanda seconded. Casey points out that this approval is for the future year (23-24) in the bid process and will go in next year's budget. The motion passed unanimously. All present voted in favor: Kevin Peterson, Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney.
- **Asphalt Seal and Crack Repair (Board Packet Pg. 142)** Amanda motioned to accept the action for the asphalt seal and crack repair as outlined in the board packet for the price of \$10,271.10. Holly seconded. Holly asked why the decision was made to go with the lowest rate option available. Kevin explained that it was the price and because the warranty didn't change between the options. Holly asked if this would be the same material that we already have and Kevin confirmed. Amanda asked how long this was going to take to be done due to concern about the muralist coming to do stencil work in the back. Blake reported that he'll contact the muralist to coordinate. The motion passed unanimously. All present voted in favor: Kevin Peterson, Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney.
- **New Marquee on 3000 East Approval (Board Packet Pg. 151)** Holly motioned to approve the proposal for the new marquee in the amount of \$94,190 with \$60,000 coming from land and site improvement from the 2023 budget and the rest from the 2024 budget when installed. Shauna seconded. Holly put the proposed design on the board screen to allow the Board to see what the proposed marquee looked like again and walked through the design. Kevin asked to confirm the dimensions which Holly stated that the people pictured below are to scale to the marquee. Blake and Holly explained what restrictions on the height were. Shannon asked that we ensure that we are in compliance with any codes that may affect the sign. Blake states that he'll have Jessica follow up with the city to ensure that the proposed marquee follows city code. Holly asked if the motion should be amended. Shannon explained her opinion that an amendment would be beneficial. Holly amends her motion to approve the new marquee in the amount of \$94,190 pending approval from the city that it is up to code. Amanda seconded the amendment. The motion passed unanimously. All present voted in favor: Kevin Peterson, Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney.

- **Roof Repair-Project #1-Old part of the building (Board Packet Pg. 179)** Amanda makes a motion to approve the proposal for the roof repairs as outlined in the board packet in the amount of \$125,312.00. Shauna seconded. Holly asks how this will affect the depreciation schedule. Kevin explains how the depreciation will work. Kevin points out that in the board packet there is the quote for both project 1 of \$125,312 and project 2 of \$98,688. Kevin explains that this proposal may need change to address the current leak in the Gym as it's in project 2. Holly asked why the roof repair was split into 2 projects. Blake reports that they were concerned with price so they broke it up into 2 projects to make it possible to split the repair between budget years but it came out to be cheaper than what they thought it would be. Shannon asked why the Gym wasn't on project 1 instead of 2. Blake said that project 1 has the K grade hallway/classes which is actually worse than the gym. Holly asks Blake what he anticipated the cost would be for the whole building. Blake reported that he was concerned that it would be closer to the cost of the parking lot but admitted that he doesn't have experience in roofing so he wouldn't have the knowledge to estimate the costs. Holly asked if it would be better to do both parts at the same time. Blake reports that the Administration would prefer that both projects be done at the same time. Kevin explains that we have the funds to do both projects. Holly states that if the Board wanted to approve both projects tonight then the motions would have to be amended. Kevin confirmed that was the case. Amanda amends the motion to do both projects and to not to exceed \$224,000. Shauna seconded her amendment. Casey requests that in future that any quotes that have been rejected still be included for purposes of transparency. The motion passed unanimously. All present voted in favor: Kevin Peterson, Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney.
- **Establish formal Audit Committee and appoint members (Board Packet Pg. 183)** Amanda motioned to approve the establishment of the Audit Committee and appointed members as outlined in the board packet. Holly seconded. Casey explained the committee and regulating body. Casey also explained the perimeters of the committee members. Kevin asked when Casey wanted to appoint the members to which Casey indicated ideally the Board would appoint the members tonight. Casey nominated himself and Kevin due to expressed interest but would like the 3rd member to be someone not on the financial committee once we have our 7th Board member. Kevin qualifies that the actual appointment will be another motion. The motion passed unanimously. All present voted in favor: Kevin Peterson, Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney. Shauna motions to accept Casey and Kevin to the Audit committee. Amanda seconded the motion. The motion passed unanimously. All present voted in favor: Kevin Peterson, Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney. Casey explains how the Audit reports will be reported to the Board.

Closed Meeting – *none*.

Reconvene — Take all appropriate action in relation to closed session items.

Next Meeting: The next regular Board Meeting will be held on July 27th, 2023 at 4:00 pm to 9:00 pm and will be the Board Retreat. Location of meeting to be determined.

Adjournment: The board adjourned at 9:02 p.m. Holly Myers motioned to adjourn. Motion carried.

Written by Deborah Odenwalder, Board Clerk

DRAFT



Financial Summary

as of June 30, 2023

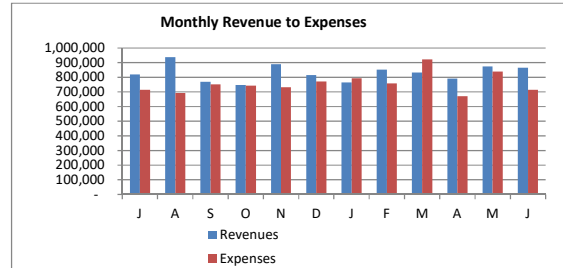
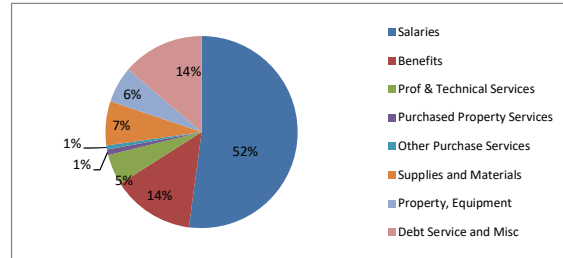
100% through the Year

BUDGET REPORT

Green - more than 5% ahead of forecast
 Yellow - within 5% of forecast
 Red - more than 5% behind forecast

	Year-to Date Actuals	Approved Budget	Forecast	% of Forecast
Enrollment	1013	1010	1005	
Revenue				
1000 Local	\$ 529,919	\$ 226,049	\$ 520,091	102%
3000 State	\$ 9,082,246	\$ 8,618,679	\$ 9,098,601	100%
4000 Federal	\$ 346,672	\$ 463,667	\$ 504,986	69%
Total Revenue	\$ 9,958,837	\$ 9,308,395	\$ 10,123,678	98%
Expenses				
100 Salaries	\$ 4,880,063	\$ 4,853,645	\$ 5,068,674	96%
200 Benefits	\$ 1,269,304	\$ 1,286,490	\$ 1,353,244	94%
300 Prof & Technical Services	\$ 456,800	\$ 424,167	\$ 500,723	91%
400 Purchased Property Services	\$ 82,039	\$ 84,000	\$ 86,280	95%
500 Other Purchase Services	\$ 64,922	\$ 68,300	\$ 68,300	95%
600 Supplies and Materials	\$ 643,135	\$ 655,797	\$ 722,200	89%
700 Property, Equipment	\$ 446,837	\$ 342,800	\$ 592,964	75%
800 Debt Service and Misc	\$ 1,249,815	\$ 1,334,713	\$ 1,334,713	94%
Total Expenses	\$ 9,092,915	\$ 9,049,911	\$ 9,727,097	93%
Net Income from Operations	\$ 865,922	\$ 258,484	\$ 396,581	218%
Operating Margin	8.7%	2.8%	3.9%	

EXPENSES

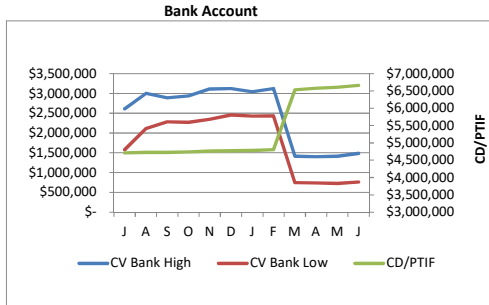


RATIOS

	Actual	Goal	Covenant	Prior Mth Change
Operating Margin	3.9%	5%		0.0%
Debt Service Coverage	1.31	1.25	1.05	0.00
Days Cash on Hand	306	130	30	5
Building Payment %	13.2%	< 22%		0.0%

CASH

Month Ending Cash Balance	\$ 8,148,484	Includes \$6,660,804 PTIF
Days Cash on Hand	306	



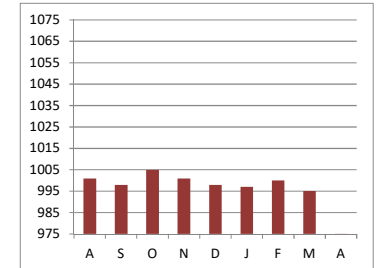
RESERVES

	Actual Ytd	Forecast
Last Year Reserve Balance	\$ 5,841,739	\$ 5,841,739
Reserves Added this Year	\$ 865,922	\$ 396,581
Project 1	\$ -	\$ -
New Reserve Balance	\$ 6,707,661	\$ 6,238,320

ENROLLMENT

	A	S	O	N	D	J	F	M	A
K	127	129	133	134	135	133	134	134	
1	133	132	130	129	129	129	130	129	
2	140	140	141	140	140	140	140	137	
3	140	140	140	137	138	137	138	136	
4	123	120	122	121	119	121	121	122	
5	131	131	132	133	133	133	133	132	
6	108	107	108	108	106	105	105	105	
7	99	99	99	99	98	99	99	100	
Total	1001	998	1005	1001	998	997	1000	995	0

WPU 862.51



Created by Red Apple



Budget Detail Report

Actuals as of: **June 30, 2023**

Percentage of Year: **100%**



	(1013 Students)		(1010 Students)		1005			% Change From Prior Mth
	FY22 Actuals	Current Yr Actuals	Approved Budget		Changes	Forecast	% of Forecast	
Revenue								
1000 Revenue From Local Sources								
1510 Interest	\$ 36,256	\$ 254,766	\$ 33,500		\$ 222,500	\$ 256,000	99.5%	14.5%
1600 Food Services	\$ 33,519	\$ 223,886	\$ 175,000		\$ 43,341	\$ 218,341	102.5%	2.5%
1741 Student Activities and Fees	\$ 8,332	\$ 1,953	\$ 6,000		\$ (4,000)	\$ 2,000	97.7%	0.0%
1741 Textbook and Library Fees	\$ 229	\$ -	\$ -		\$ -	\$ -	0.0%	0.0%
1920 Donations	\$ 11,497	\$ 14,778	\$ 6,349		\$ 8,429	\$ 14,778	100.0%	0.0%
1920 GWA Gives Back	\$ 5,009	\$ 1,289	\$ -		\$ 1,289	\$ 1,289	100.0%	0.0%
1920 Background Checks	\$ 1,496	\$ 1,264	\$ 1,200		\$ 30	\$ 1,230	102.8%	2.8%
1920 Staff Lounge	\$ 2,723	\$ 3,157	\$ 3,000		\$ -	\$ 3,000	105.2%	33.8%
1920 Principal Discretionary	\$ 162	\$ -	\$ -		\$ -	\$ -	0.0%	0.0%
1920 Dixie Direct Fundraiser	\$ -	\$ 8,480	\$ -		\$ 8,558	\$ 8,558	99.1%	0.0%
1930 Sales of Assets	\$ 6,573	\$ 14,895	\$ 1,000		\$ 13,895	\$ 14,895	100.0%	0.0%
1990 Miscellaneous Income	\$ 5,319	\$ 5,451	\$ -		\$ -	\$ -	0.0%	-7.9%
Total 1000:	\$ 111,115	\$ 529,919	\$ 226,049		\$ 294,042	\$ 520,091	101.9%	7.8%
3000 Revenue From State Sources MSP								
30-3005 Regular School Program K	\$ 277,873	\$ 291,444	\$ 297,672		\$ (6,228)	\$ 291,444	100.0%	9.1%
30-3010 Regular School Program 1-12	\$ 3,011,210	\$ 3,164,957	\$ 3,226,515		\$ (61,558)	\$ 3,164,957	100.0%	9.0%
30-3020 Professional Staff	\$ 230,673	\$ 219,093	\$ 226,817		\$ (7,724)	\$ 219,093	100.0%	8.5%
31-1205 Sped Educ Reg Add-On W/PUS	\$ 358,660	\$ 451,736	\$ 372,386		\$ 79,350	\$ 451,736	100.0%	9.1%
31-1210 Sped Educ Reg Self Contained	\$ 31,022	\$ 40,335	\$ 31,025		\$ 9,310	\$ 40,335	100.0%	9.1%
31-1220 Sped Educ Extended Year Program	\$ 2,259	\$ 3,721	\$ 3,331		\$ 390	\$ 3,721	100.0%	9.1%
31-1225 Sped Educ State Programs	\$ 5,997	\$ 7,355	\$ 5,557		\$ 1,798	\$ 7,355	100.0%	9.1%
31-1278 Sped Educ Stipends Extended Year	\$ 1,904	\$ 672	\$ 784		\$ (112)	\$ 672	100.0%	0.0%
31-5201 Class Size Reduction K-8	\$ 351,803	\$ 373,915	\$ 345,922		\$ 28,099	\$ 374,021	100.0%	9.1%
31-5344 Enhancement for At-Risk Student	\$ 64,658	\$ 91,935	\$ 63,577		\$ 28,358	\$ 91,935	100.0%	9.1%
31-5901 Career and Tech Ed Dist. Add-On	\$ 5,668	\$ 6,087	\$ 5,897		\$ 190	\$ 6,087	100.0%	9.1%
31-5903 CTE Comprehensive Counseling	\$ 20,000	\$ 20,000	\$ 19,666		\$ 334	\$ 20,000	100.0%	9.1%
32-0500 Charter School Admin--Costs Base Funding	\$ 96,528	\$ 94,613	\$ 94,914		\$ (301)	\$ 94,613	100.0%	9.1%
32-5619 Charter School Local Replacement	\$ 2,746,917	\$ 2,958,636	\$ 2,899,000		\$ 59,636	\$ 2,958,636	100.0%	9.1%
32-5651 Educator Professional Time	\$ -	\$ 86,875	\$ -		\$ 86,875	\$ 86,875	100.0%	0.0%
32-5653 Public Ed Capital & Technology	\$ -	\$ 128,603	\$ -		\$ 128,603	\$ 128,603	100.0%	0.0%
33-5641 Early Intervention - OEK	\$ 152,652	\$ 150,000	\$ 152,652		\$ (2,652)	\$ 150,000	100.0%	9.1%
33-5805 Early Literacy	\$ 51,450	\$ 31,910	\$ 50,590		\$ (18,680)	\$ 31,910	100.0%	8.5%
34-5642 Elementary School Counselor Grant	\$ 50,000	\$ 50,000	\$ 50,000		\$ -	\$ 50,000	100.0%	0.0%
34-5807 Teacher Salary Supplement Program	\$ -	\$ 3,570	\$ -		\$ 3,570	\$ 3,570	100.0%	0.0%
34-5868 Teacher Supplies and Materials	\$ 7,415	\$ 7,372	\$ 7,415		\$ (43)	\$ 7,372	100.0%	0.0%
34-5876 Educator Salary Adjustment	\$ 248,457	\$ 260,792	\$ 248,457		\$ 12,335	\$ 260,792	100.0%	9.1%
34-5911 ELL Software	\$ 6,632	\$ 4,226	\$ -		\$ 4,226	\$ 4,226	100.0%	0.0%
35-5420 School Land Trust Program	\$ 134,357	\$ 137,330	\$ 137,145		\$ 185	\$ 137,330	100.0%	0.0%
35-5655 Digital Teaching & Learning	\$ 62,886	\$ 60,836	\$ 58,919		\$ 1,917	\$ 60,836	100.0%	0.0%
35-5666 Professional Learning Grant	\$ -	\$ 9,033	\$ -		\$ 9,033	\$ 9,033	100.0%	9.1%
35-5678 TSSA	\$ 165,244	\$ 197,799	\$ 163,633		\$ 42,027	\$ 205,660	96.2%	8.6%
35-5679 School Based Mental Health Grant	\$ 54,851	\$ 55,474	\$ 54,851		\$ 623	\$ 55,474	100.0%	0.0%
35-5810 Library Books & Elective Resources	\$ 1,067	\$ 1,067	\$ 1,049		\$ 18	\$ 1,067	100.0%	9.1%
Library ARPA Physical Collection Grant	\$ 2,000	\$ -	\$ -		\$ -	\$ -	0.0%	0.0%
Children & Teen Enhancement Grant	\$ 3,000	\$ -	\$ -		\$ -	\$ -	0.0%	0.0%
38-5654 Period Products in Schools	\$ -	\$ 2,244	\$ -		\$ -	\$ -	0.0%	0.0%
38-5673 Substance Prevention	\$ 2,333	\$ 4,000	\$ 2,294		\$ 1,706	\$ 4,000	100.0%	0.0%
38-5674 Elementary Suicide Prevention	\$ 1,000	\$ 1,000	\$ 1,000		\$ -	\$ 1,000	100.0%	0.0%
38-5697 LETRS Professional Development Grant	\$ -	\$ 48,637	\$ -		\$ 48,637	\$ 48,637	100.0%	0.0%
38-8070 School Lunch (Liquor Tax)	\$ 121,242	\$ 88,363	\$ 70,000		\$ 30,000	\$ 100,000	88.4%	12.5%
35-5882 Beverly Taylor Sorenson Grant	\$ 26,541	\$ 28,616	\$ 27,611		\$ -	\$ 27,611	103.6%	9.1%
Total 3000:	\$ 8,296,299	\$ 9,082,246	\$ 8,618,679		\$ 479,922	\$ 9,098,601	99.8%	9.2%
4000 Revenue From Federal Sources								
42-7210 ESSER CARES	\$ -	\$ -	\$ -		\$ -	\$ -	0.0%	0.0%
42-7215 ESSER II CARES	\$ 45,009	\$ 22,140	\$ 29,231		\$ -	\$ 29,231	75.7%	0.0%
42-7220 GEERS	\$ 22,714	\$ -	\$ -		\$ -	\$ -	0.0%	0.0%
42-7225 ESSER III ARP	\$ 448,374	\$ 33,005	\$ 54,000		\$ -	\$ 54,000	61.1%	0.0%
45-7280 Corona Relief Grant	\$ -	\$ -	\$ -		\$ -	\$ -	0.0%	0.0%
45-7522 IDEA Pre-School	\$ 2,588	\$ -	\$ 2,588		\$ (260)	\$ 2,328	0.0%	0.0%
45-7524 IDEA Flow-Through	\$ 141,461	\$ -	\$ 141,461		\$ (2,087)	\$ 139,374	0.0%	0.0%
45-8075 National School Lunch Program	\$ 46,614	\$ 94,514	\$ 40,000		\$ 49,000	\$ 89,000	106.2%	12.4%
45-8075 Free & Reduced Reimbursement	\$ 545,496	\$ 111,907	\$ 115,000		\$ -	\$ 115,000	97.3%	12.8%
45-8075 School Breakfast Program	\$ 57,387	\$ 34,053	\$ 35,000		\$ -	\$ 35,000	97.3%	11.7%
45-8081 Emergency Operating Funds	\$ 536	\$ -	\$ -		\$ -	\$ -	0.0%	0.0%
47-7290 CARES UEN WiFi	\$ -	\$ -	\$ -		\$ -	\$ -	0.0%	0.0%
48-7801 Federal Title I A	\$ 93,232	\$ 42,905	\$ 32,784		\$ 8,269	\$ 41,053	104.5%	329.1%
48-7860 Federal NCLB Title II A	\$ 14,409	\$ 8,148	\$ 13,603		\$ (13,603)	\$ -	0.0%	0.0%
Total 4000:	\$ 1,417,820	\$ 346,672	\$ 463,667		\$ 41,319	\$ 504,986	68.6%	24.3%
Total Revenue:	\$ 9,825,234	\$ 9,958,837	\$ 9,308,395		\$ 815,283	\$ 10,123,678	98.4%	9.6%



(1013 Students)

(1010 Students)

1005

Expenses	FY22	Current Yr	Approved	1005		% Change From Prior Mth	
	Actuals	Actuals	Budget	Changes	Forecast		
100 Salaries							
121 Administration	\$ 348,257	\$ 398,644	\$ 390,906	\$ 8,000	\$398,906	99.9%	11.9%
131 Teachers	\$ 2,464,001	\$ 2,731,792	\$ 2,653,940	\$ 97,715	\$2,751,656	99.3%	9.3%
131 Special Education Salaries	\$ 209,402	\$ 224,935	\$ 223,304	\$ 91,159	\$314,463	71.5%	9.4%
132 Substitute Teachers (PTO Stipend)	\$ 8,326	\$ 17,677	\$ 30,000	\$ -	\$ 30,000	58.9%	0.0%
132 SpEd Substitutes	\$ -	\$ -	\$ 5,000	\$ -	\$ 5,000	0.0%	0.0%
131 Stipends / Merit Pay	\$ 80,397	\$ 55,715	\$ 52,020	\$ 6,980	\$ 59,000	94.4%	3.7%
Summer Professional Development	\$ -	\$ 60,000	\$ -	\$ 60,000	\$ 60,000	100.0%	400.0%
LETRS Training Stipend	\$ -	\$ 72,500	\$ 65,000	\$ 7,500	\$ 72,500	100.0%	0.0%
LAND TRUST - Stipends	\$ 1,125	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
Special Education Stipends (After School)	\$ 43,904	\$ 4,100	\$ -	\$ -	\$ -	0.0%	64.0%
ESSER II - Stipends	\$ 3,000	\$ 11,125	\$ 12,000	\$ -	\$ 12,000	92.7%	0.0%
ESSER III - After School Stipends	\$ 58,250	\$ 58,500	\$ 54,000	\$ -	\$ 54,000	108.3%	0.0%
142 Counselor	\$ 151,048	\$ 174,574	\$ 171,182	\$ 6,000	\$177,182	98.5%	9.2%
143 School Nurse	\$ 2,717	\$ 4,095	\$ 9,075	\$ (4,075)	\$5,000	81.9%	4.3%
145 Librarian / Literacy Aide	\$ 12,483	\$ 15,410	\$ 23,835	\$ (8,335)	\$15,500	99.4%	2.3%
152 Secretaries	\$ 110,496	\$ 123,438	\$ 121,982	\$ -	\$121,982	101.2%	7.0%
161 Teacher Aides, Reading Specialists & Subs	\$ 287,163	\$ 404,165	\$ 419,165	\$ -	\$419,165	96.4%	4.6%
161 LAND TRUST - K Aide/Student Support Para	\$ 30,935	\$ 34,000	\$ 34,000	\$ -	\$ 34,000	100.0%	0.0%
161 SpEd Aides & Speech Therapist	\$ 127,717	\$ 143,621	\$ 159,398	\$ -	\$159,398	90.1%	5.5%
162 Computer Aides	\$ 36,595	\$ 20,417	\$ 21,005	\$ -	\$21,005	97.2%	4.6%
182 Custodial & Maintenance	\$ 110,269	\$ 87,841	\$ 107,917	\$ -	\$107,917	81.4%	9.2%
191 Lunch Room Aide	\$ 231,425	\$ 237,514	\$ 299,916	\$ (49,916)	\$250,000	95.0%	5.1%
Total 100:	\$ 4,317,510	\$ 4,880,063	\$ 4,853,645	\$ 215,029	\$ 5,068,674	96.3%	9.7%
200 Employee Benefits							
220 Social Security	\$ 281,966	\$ 328,958	\$ 339,044	\$ 38,550	\$ 377,594	87.1%	9.8%
LAND TRUST - BENEFITS	\$ 4,574	\$ 2,891	\$ 2,601	\$ -	\$ 2,601	111.1%	11.1%
SpEd Social Security	\$ 23,687	\$ 22,540	\$ 29,659	\$ -	\$ 29,659	76.0%	8.0%
230 Retirement	\$ 203,879	\$ 211,934	\$ 214,523	\$ -	\$ 214,523	98.8%	9.7%
240 Group Insurance	\$ 668,982	\$ 642,934	\$ 656,000	\$ 15,000	\$ 671,000	95.8%	8.6%
240 Deductible Stipend	\$ 15,868	\$ 29,796	\$ 15,000	\$ 13,000	\$ 28,000	106.4%	13.0%
270 Worker's Compensation Fund	\$ 15,225	\$ 18,867	\$ 16,425	\$ 2,442	\$ 18,867	100.0%	0.0%
280 Unemployment Insurance	\$ 8,483	\$ 11,384	\$ 13,238	\$ (2,238)	\$ 11,000	103.5%	49.1%
Total 200:	\$ 1,222,664	\$ 1,269,304	\$ 1,286,490	\$ 66,754	\$ 1,353,244	93.8%	9.3%
300 Purchased Professional & Technical							
320 Special Education Contractors	\$ 100,505	\$ 120,248	\$ 120,610	\$ -	\$ 120,610	99.7%	5.3%
320 Counseling Services - (FY20 LCSW-Mental Health)	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
330 Employee Training & Development	\$ 32,005	\$ -	\$ 30,000	\$ (25,000)	\$ 5,000	0.0%	0.0%
TSSA - Training & Development	\$ -	\$ 30,000	\$ -	\$ 30,000	\$ 30,000	100.0%	0.0%
LAND TRUST - Training & Development	\$ 9,134	\$ 1,232	\$ 24,000	\$ -	\$ 24,000	5.1%	0.0%
SpEd Training & Development	\$ 1,800	\$ 6,000	\$ -	\$ 6,000	\$ 6,000	100.0%	0.0%
LETRS Professional Learning Grant PD	\$ -	\$ 48,637	\$ -	\$ -	\$ 48,637	100.0%	0.0%
330 SEDC Services	\$ -	\$ 2,583	\$ 3,891	\$ -	\$ 3,891	66.4%	0.0%
340 Audit	\$ 22,070	\$ 22,134	\$ 22,070	\$ 64	\$ 22,134	100.0%	0.0%
345 Business Manager Services	\$ 76,800	\$ 78,336	\$ 78,336	\$ -	\$ 78,336	100.0%	9.1%
349 Legal Services	\$ 1,638	\$ 4,428	\$ 15,000	\$ -	\$ 15,000	29.5%	7.7%
350 Technical Services (IT)	\$ 98,144	\$ 96,419	\$ 101,760	\$ -	\$ 101,760	94.8%	9.1%
580 Admin & Teacher Travel (Meals)	\$ 29,004	\$ 15,428	\$ 20,280	\$ (6,280)	\$ 14,000	110.2%	35.8%
TSSA - Travel	\$ -	\$ 20,280	\$ -	\$ 20,280	\$ 20,280	100.0%	0.0%
LAND TRUST - Travel	\$ 6,538	\$ 6,000	\$ 6,000	\$ -	\$ 6,000	100.0%	0.0%
SpEd - Travel	\$ 2,621	\$ 5,075	\$ 2,220	\$ 2,855	\$ 5,075	100.0%	0.0%
Total 300:	\$ 380,259	\$ 456,800	\$ 424,167	\$ 27,919	\$ 500,723	91.2%	5.8%
400 Purchased Property Services							
411 Water/Sewage	\$ 10,597	\$ 9,628	\$ 12,000	\$ -	\$ 12,000	80.2%	8.6%
412 Disposal Services	\$ 11,222	\$ 14,246	\$ 13,000	\$ 2,480	\$ 15,480	92.0%	0.0%
420 Cleaning Services	\$ 2,684	\$ 5,313	\$ 4,000	\$ 1,800	\$ 5,800	91.6%	7.8%
431 Lawn Care Services	\$ 10,700	\$ 11,800	\$ 12,000	\$ -	\$ 12,000	98.3%	0.0%
431 Non-Technology Repairs & Maintenance	\$ 31,073	\$ 35,423	\$ 30,000	\$ 3,000	\$ 33,000	107.3%	21.7%
432 Copy Machine Servicing	\$ 9,145	\$ 5,629	\$ 13,000	\$ (5,000)	\$ 8,000	70.4%	0.0%
Total 400:	\$ 75,421	\$ 82,039	\$ 84,000	\$ 33,054	\$ 86,280	95.1%	10.7%
500 Other Purchased Services							
522 Property & Liability Insurance	\$ 42,668	\$ 45,243	\$ 45,300	\$ -	\$ 45,300	99.9%	12.0%
530 Telephone	\$ 10,127	\$ 11,586	\$ 11,000	\$ -	\$ 11,000	105.3%	971.8%
540 Marketing	\$ 9,042	\$ 7,923	\$ 9,000	\$ -	\$ 9,000	88.0%	0.0%
590 Field Trips / Bus Rental	\$ 100	\$ 170	\$ 3,000	\$ -	\$ 3,000	5.7%	0.0%
Total 500:	\$ 61,937	\$ 64,922	\$ 68,300	\$ -	\$ 68,300	95.1%	31.0%



	(1013 Students) FY22 Actuals	Current Yr Actuals	(1010 Students) Approved Budget	1005 Changes	Forecast	% of Forecast	% Change From Prior Mth
600 Supplies and Materials							
610a Classroom Supplies	\$ 50,898	\$ 17,482	\$ 63,000	\$ (43,000)	\$ 20,000	87.4%	7.6%
TSSA - Supplies	\$ -	\$ 3,226	\$ -	\$ 18,320	\$ 18,320	17.6%	1.9%
LAND TRUST	\$ 3,227	\$ 11,967	\$ 12,000	\$ -	\$ 12,000	99.7%	0.0%
ESSER II - Supplies	\$ -	\$ 17,171	\$ 17,000	\$ -	\$ 17,000	101.0%	0.0%
610b Special Ed Supplies	\$ 7,321	\$ 5,806	\$ 10,000	\$ -	\$ 10,000	58.1%	11.6%
610c Theatre Supplies	\$ 3,334	\$ 6,886	\$ 4,000	\$ 3,000	\$ 7,000	98.4%	0.0%
610d CCA Expenses	\$ 7,159	\$ 4,843	\$ 5,179	\$ -	\$ 5,179	93.5%	0.0%
610e Student Activity Supplies / Incentives	\$ 9,655	\$ 13,713	\$ 18,000	\$ (2,000)	\$ 16,000	85.7%	0.7%
610f Board Expenses/meals	\$ 3,393	\$ 3,646	\$ 7,000	\$ -	\$ 7,000	52.1%	0.8%
610g Office Supplies/General	\$ 24,713	\$ 27,417	\$ 28,000	\$ -	\$ 28,000	97.9%	1.1%
610h Safety Supplies	\$ 2,322	\$ 3,666	\$ 3,000	\$ 1,000	\$ 4,000	91.7%	1.3%
610i GWA Gives Back	\$ 5,096	\$ 1,295	\$ -	\$ 1,295	\$ 1,295	100.0%	0.0%
610j First Aid Supplies	\$ 398	\$ 862	\$ 1,000	\$ -	\$ 1,000	86.2%	0.0%
610k Director Discretionary Fund	\$ 9,693	\$ 10,587	\$ 10,000	\$ -	\$ 10,000	105.9%	8.2%
610m Staff Lounge	\$ 5,570	\$ 5,797	\$ 5,500	\$ 272	\$ 5,772	100.4%	0.4%
610n Swag Store	\$ 4,821	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
610o Christmas Party	\$ 4,018	\$ 3,780	\$ 4,018	\$ -	\$ 4,018	94.1%	0.0%
610p Health and Wellness Incentives	\$ 1,793	\$ 2,285	\$ 4,000	\$ -	\$ 4,000	57.1%	4.1%
621 Natural Gas	\$ 10,144	\$ 13,925	\$ 12,500	\$ 1,500	\$ 14,000	99.5%	2.0%
622 Electricity	\$ 40,467	\$ 43,158	\$ 40,000	\$ 3,000	\$ 43,000	100.4%	10.8%
630 School Lunch Prgm	\$ 208,598	\$ 219,240	\$ 200,000	\$ 30,000	\$ 230,000	95.3%	0.3%
641 Textbooks/Curriculum	\$ 26,138	\$ 36,474	\$ 76,081	\$ (20,200)	\$ 55,881	65.3%	0.0%
TSSA - Curriculum	\$ -	\$ 39,200	\$ -	\$ 39,200	\$ 39,200	100.0%	0.0%
UCCRSC	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
Digital Teaching & Learning Curriculum	\$ 51,395	\$ 45,836	\$ 43,919	\$ 1,917	\$ 45,836	100.0%	0.0%
SpEd - Textbooks/Curriculum	\$ -	\$ 29,855	\$ -	\$ 29,855	\$ 29,855	100.0%	0.0%
644 Library Books	\$ 9,654	\$ 5,318	\$ 7,000	\$ -	\$ 7,000	76.0%	0.0%
670 Educational Software	\$ 21,357	\$ 6,236	\$ 26,500	\$ (10,800)	\$ 15,700	39.7%	0.0%
TSSA - Educational Software	\$ -	\$ 10,800	\$ -	\$ 10,800	\$ 10,800	100.0%	0.0%
LAND TRUST - Educational Software	\$ 14,501	\$ 14,700	\$ 14,700	\$ -	\$ 14,700	100.0%	0.0%
SpEd - Educational Software	\$ 1,343	\$ 690	\$ 3,400	\$ -	\$ 3,400	20.3%	0.0%
ESSER III - Educational Software	\$ 29,360	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
680 Maintenance Supplies & Material	\$ 29,619	\$ 37,274	\$ 40,000	\$ 2,244	\$ 42,244	88.2%	0.0%
ESSER III - Maintenance Supplies	\$ 5,123	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
Total 600:	\$ 591,110	\$ 643,135	\$ 655,797	\$ 66,403	\$ 722,200	89.1%	1.3%
700 Property							
710 Land and Site Improvements & Building	\$ 30,499	\$ 92,792	\$ 25,000	\$ 82,000	\$ 107,000	86.7%	285.2%
733 Furniture and Fixtures	\$ 15,649	\$ 19,702	\$ 20,000	\$ -	\$ 20,000	98.5%	0.0%
SpEd - Furniture and Fixtures	\$ -	\$ 1,296	\$ -	\$ 1,296	\$ 1,296	100.0%	0.0%
734 Technology Hardware	\$ 19,393	\$ 1,346	\$ 2,700	\$ 1,346	\$ 2,700	49.9%	-0.1%
LAND TRUST - Hardware	\$ 50,403	\$ 49,510	\$ 55,000	\$ -	\$ 55,000	90.0%	0.0%
SpEd - Tech Hardware	\$ 4,485	\$ 3,453	\$ -	\$ 345	\$ 345	1000.9%	900.9%
ESSER III - Tech Hardware	\$ 332,124	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
Digital Teaching & Learning Hardware	\$ -	\$ 15,000	\$ 15,000	\$ -	\$ 15,000	100.0%	0.0%
736 Technology Software	\$ 46,451	\$ 3,789	\$ 48,000	\$ (48,000)	\$ -	0.0%	532.6%
TSSA - Software	\$ -	\$ 48,000	\$ -	\$ 48,000	\$ 48,000	100.0%	0.0%
LAND TRUST - Software	\$ 7,712	\$ 5,500	\$ 5,500	\$ -	\$ 5,500	100.0%	0.0%
SpEd - Software	\$ 1,600	\$ 1,680	\$ 1,600	\$ 80	\$ 1,680	100.0%	0.0%
739 Kitchen Equipment	\$ 4,168	\$ 23,440	\$ 20,000	\$ 3,440	\$ 23,440	100.0%	0.0%
790 Cap Ex Fund	\$ 127,067	\$ 181,329	\$ 150,000	\$ 163,003	\$ 313,003	57.9%	2.1%
Total 700:	\$ 639,551	\$ 446,837	\$ 342,800	\$ 250,164	\$ 592,964	75.4%	21.4%
800 Debt Service & Miscellaneous							
810 Dues and Fees	\$ 11,165	\$ 13,167	\$ 15,000	\$ -	\$ 15,000	87.8%	-0.2%
830 Bond Restricted Assets (Interest)	\$ 530,913	\$ 450,035	\$ 500,913	\$ -	\$ 500,913	89.8%	9.5%
840 Bond Restricted Assets (Principal)	\$ 750,000	\$ 779,313	\$ 785,000	\$ -	\$ 785,000	99.3%	9.5%
833 Bond Fees	\$ 57,240	\$ 7,300	\$ 33,800	\$ -	\$ 33,800	21.6%	0.0%
890 Miscellaneous	\$ 3,486	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
Total 800:	\$ 1,352,804	\$ 1,249,815	\$ 1,334,713	\$ -	\$ 1,334,713	93.6%	9.4%
Total Expenses:	\$ 8,641,256	\$ 9,092,915	\$ 9,049,911	\$ 659,323	\$ 9,727,097	93.5%	9.4%
Net Income:	\$ 1,183,978	\$ 865,922	\$ 258,484	\$ 155,960	\$ 396,581	218.3%	
					\$ 250,000	Restricted Forecasted Spend Down	
					\$ 361,805	Food Service: \$ 34,776	
					\$ 34,776	SpEd: \$ (48,234)	
Cap Ex Fund:		At year end: \$ 168,402		Use: \$177,616	At year end: \$ 300,076		
(Unrestricted over \$350,000) Special Project Fund:		Beg of Year \$ 97,843			At year end: \$ 109,648		
Fund Reserve:	\$ 5,841,739		\$ 6,100,223		\$ 6,203,544		

GEORGE WASHINGTON ACADEMY

Balance Sheet

As of June 30, 2023

	<u>Jun 30, 23</u>
ASSETS	
Current Assets	
Checking/Savings	
8110 · Cash in Banks	
8111 · Cache Valley Bank Accounts	
1 · Petty Cash	179.07
8111.1 · Cache Valley Bank (2050)	1,481,911.43
8111.2 · Cache Valley Bank Debit (0459)	5,589.11
Total 8111 · Cache Valley Bank Accounts	<u>1,487,679.61</u>
8116 · PTIF	6,660,804.27
8120 · US Bank Accounts	
8120.1C · Principal Fund 2015 (80001)	205,801.24
8120.2 · Interest Fund 2008 (9002)	0.02
8120.2B · Interest Fund 2011 (5001)	0.01
8120.2C · Interest Fund 2015 (80002)	130,323.12
8120.3C · Reserve Fund 2015 (80003)	1,285,912.50
8120.5C · Repair & Rplcmnt 2015 (80005)	150,000.00
8120.6C · Expense Fund 2015 (80006)	73,502.93
Total 8120 · US Bank Accounts	<u>1,845,539.82</u>
Total 8110 · Cash in Banks	<u>9,994,023.70</u>
Total Checking/Savings	9,994,023.70
Other Current Assets	
8130 · Accounts Recievable	
8133 · State	898.00
8135 · Utah State Sales Tax	3,415.22
Total 8130 · Accounts Recievable	<u>4,313.22</u>
Total Other Current Assets	<u>4,313.22</u>
Total Current Assets	<u>9,998,336.92</u>
TOTAL ASSETS	<u><u>9,998,336.92</u></u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
9513 · Accounts Payable-bill.com	87,731.43
Total Accounts Payable	87,731.43
Credit Cards	
9531 · Visa Card	
9531a · VISA Card - Jessica's Card	606.87
9531b · VISA Card - Blake's Card	85.19
9531d · VISA Card - Shannon's Card	-1,000.00
9531e · VISA Card - Chance's Card	-432.35
Total 9531 · Visa Card	<u>-740.29</u>
9532 · Lowe's	-253.76
Total Credit Cards	<u>-994.05</u>
Other Current Liabilities	
9510 · Accounts Payable	479.66
9530 · Accrued Liabilities	
9535 · Accrued Bond Liability	-56,564.97
Total 9530 · Accrued Liabilities	<u>-56,564.97</u>
9540 · Accrued Salaries & Withholdings	
9544 · Utah State Withholding	15,291.00
9545 · Payroll Liabilities	

GEORGE WASHINGTON ACADEMY

Balance Sheet

As of June 30, 2023

	<u>Jun 30, 23</u>
9545.5 · Utah State Unemployment	<u>3,750.98</u>
Total 9545 · Payroll Liabilities	<u>3,750.98</u>
Total 9540 · Accrued Salaries & Withholdings	19,041.98
9540a · Payroll & Benefit YE Accrual	262,057.32
9560 · Deferred Revenue	
9561 · Local	9,177.31
9563 · State	<u>400,000.00</u>
Total 9560 · Deferred Revenue	<u>409,177.31</u>
Total Other Current Liabilities	<u>634,191.30</u>
Total Current Liabilities	<u>720,928.68</u>
Total Liabilities	720,928.68
Equity	
30000 · Opening Balance Equity	193.93
9820 · Net Assets - Restricted	274,127.03
9830 · Retained Earnings	7,707,643.67
9850 · Unreserved Fund Balances	7,398.97
9859 · Undesignated Fund Balance	422,122.16
Net Income	<u>865,922.48</u>
Total Equity	<u>9,277,408.24</u>
TOTAL LIABILITIES & EQUITY	<u><u>9,998,336.92</u></u>



PROPOSAL FOR BOARD ACTION

Proposal Title: Roofing Transparency

Submitted by: Steve Erickson

Originating Committee: Campus Management

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

Situation:

I apologize for not getting all the information into the Board Packet for last months Board Meeting. As a reminder, Hirschi Roofing and Insulation was awarded the project. We recieved 4 quotes with 2 separate sections depending on how much we wanted to do. The Board approved moving forward with both projects. I have included all the information for you to review. The roofing is currently being done and is projected to be done before school starts.

Background Information, including a list of reviewing committees:

Assessment:

Recommendation:

Please submit this form with all accompanying paperwork to the Board Secretary, Deborah Odenwalder, at dodenwalder@gwacademy.org by the 15th day of the month of the Board meeting.

HIRSCHI ROOFING AND INSULATION

1030 E Commerce Dr Unit 400
 Saint George, UT 84790
 Office 435-673-6667
 Fax 435-674-5217 ?

Residential and Commercial
SINCE 1993

5/8/2023

Roof Pitch

Customer George Washington Academy
Address 2277 S 3000 E
City,St St.George UT, 84790
Phone 673-2232
Email
Contact
Salesperson

Job Name over main entrance
Plan Bid set
Address
Phone
Job Super
Subdivision
Lot #

Our bid is for labor and material to install a new 60 mill tpo over the existing tpo.

- 1- Remove cap metal from parapet walls**
- 2- Remove existing tpo from parapet walls, around a/c curbs and sky lights.**
- 3- Install new insulfoam over existing tpo
- 4- Install mechanically fastened Genflex 60 mill tpo membrane over insulfoam.
 Complete with tpo pipe flashings, Screws, plates
 to fasten both insulfoam and tpo membrane to the roof deck.
- 5- Install new tpo up all parapet wall's and a/c curbs complete with bonding adhesive.
- 6- Reinstall cap metal with urethane caulk on all laps.
- 7- Haul all debris to the washington county land field

Genflex Has A Twenty Year Material Warranty

Base Estimate \$125,312

Our bid reflects the current pricing as of today. Due to the volatility of the market, any price increases we receive from manufacturers and or distributors after the original bid date will be **added to the bid, submitted, accepted, and signed by the customer before we order and or schedule the job.**

Insatall eve riser if the framer did not raise the fascia for flat tile ADD \$ -

Disclaimer: This communication may contain privileged and/or confidential information. It is intended solely for the use of the addressee. If you are not the intended recipient, you are strictly prohibited from disclosing, copying, distributing or using any of this information. Snow removal is not included in our bid and will be billed out at \$45 dollars an hour per man. This offer expires if not signed and accepted by both parties within 10 days after the date listed at the top of this agreement. Terms: Net 30 days from invoice date; 2% finance charges on balance unpaid after 30 days(26.8% annum) Customer agrees to pay all costs and expenses of collection We use pgress billing for all services and may require a deposit to begin work.

Accepted Date _____

Approved Date _____

Company Name _____

By _____

By _____

Signature

Signature

Date

HIRSCHI ROOFING AND INSULATION

1030 E Commerce Dr Unit 400
 Saint George, UT 84790
 Office 435-673-6667
 Fax 435-674-5217 ?

Residential and Commercial
SINCE 1993

5/8/2023

Roof Pitch

Customer George Washington Academy
Address 2277 S 3000 E
City,St St.George UT, 84790
Phone 673-2232
Email
Contact
Salesperson

Job Name North West and Library section
Plan Bid set
Address
Phone
Job Super
Subdivision
Lot #

Our bid is for labor and material to install a new 60 mill tpo over the existing tpo.

- 1- Remove cap metal from parapet walls**
- 2- Remove existing tpo from parapet walls, around a/c curbs and sky lights.**
- 3- Install new insulfoam over existing tpo
- 4- Install mechanically fastened Genflex 60 mill tpo membrane over insulfoam.
 Complete with tpo pipe flashings, Screws, plates
 to fasten both insulfoam and tpo membrane to the roof deck.
- 5- Install new tpo up all parapet wall's and a/c curbs complete with bonding adhesive.
- 6- Reinstall cap metal with urethane caulk on all laps.
- 7- Haul all debris to the washington county land field

Genflex Has A Twenty Year Material Warranty

Base Estimate \$98,688

Our bid reflects the current pricing as of today. Due to the volatility of the market, any price increases we receive from manufacturers and or distributors after the original bid date will be **added to the bid, submitted, accepted, and signed by the customer before we order and or schedule the job.**

Insatall eve riser if the framer did not raise the fascia for flat tile ADD \$ -

Disclaimer: This communication may contain privileged and/or confidential information. It is intended solely for the use of the addressee. If you are not the intended recipient, you are strictly prohibited from disclosing, copying, distributing or using any of this information. Snow removal is not included in our bid and will be billed out at \$45 dollars an hour per man. This offer expires if not signed and accepted by both parties within 10 days after the date listed at the top of this agreement. Terms: Net 30 days from invoice date; 2% finance charges on balance unpaid after 30 days(26.8% annum) Customer agrees to pay all costs and expenses of collection We use progress billing for all services and may require a deposit to begin work.

Accepted Date _____

Approved Date _____

Company Name _____

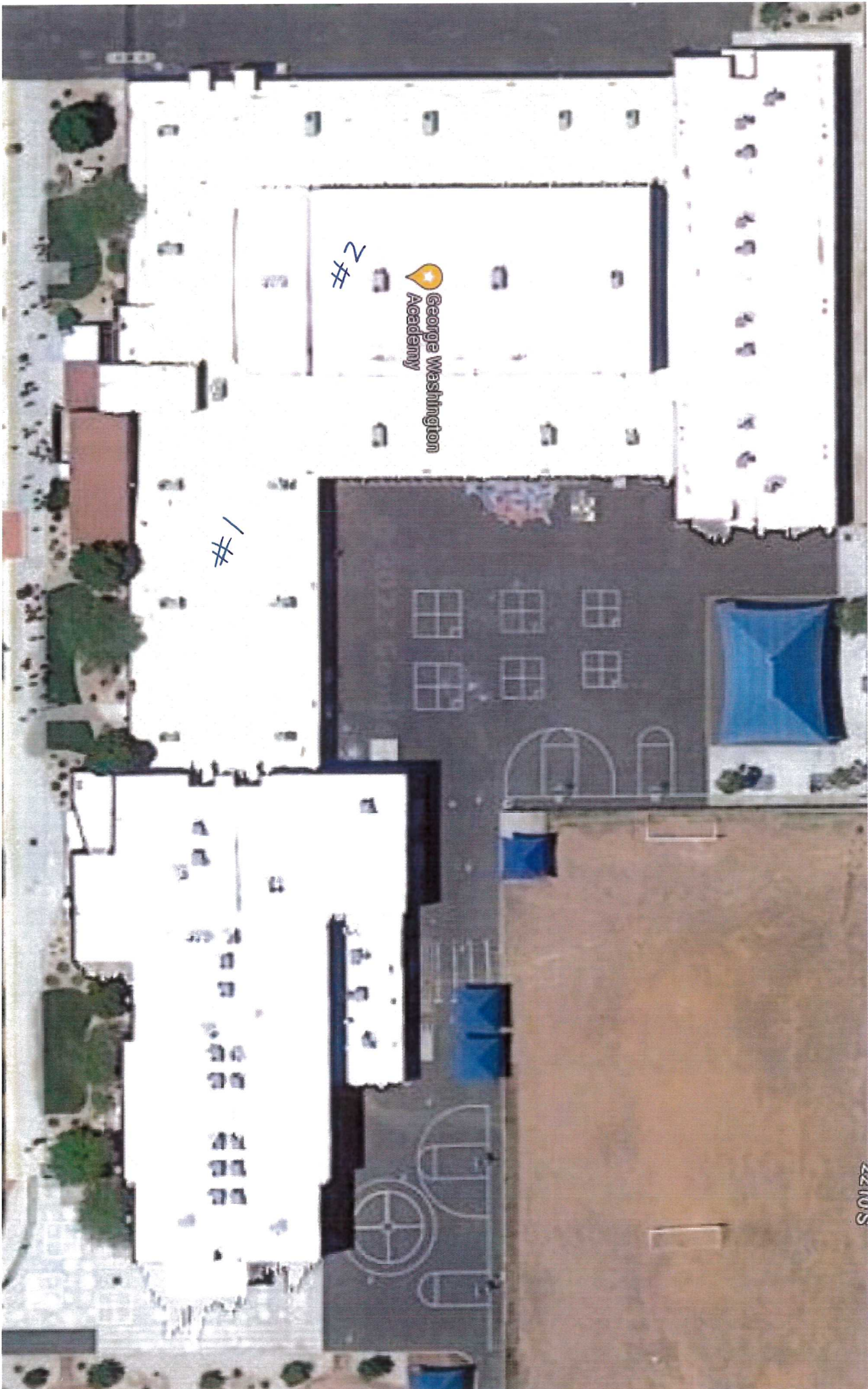
By _____

By _____

Signature

Signature

Date



George Washington
Academy

#2

#1

2107



ROOFING PROPOSAL

BETTER ROOFING SYSTEMS, INC.

MAILING Address: P.O. BOX 460996, LEEDS, UT 84746

CELL (435) 703-2677 Email: betterroofingsystems@yahoo.com

Utah License No. 1275235-5501 * Nevada License No. 0050237 (Monetary Limit of \$525,000) * Arizona License No. ROC186769

Residential * Commercial * Tile * Asphalt * Flat * Metal

PROPOSAL SUBMITTED TO: George Washington Acade DATE: 5/9/23

Over Main Entrance PHONE: 0

OWNER: George Washington Academy

CELL: 0

STREET 2277 S. 3000 E.

FAX: 0

CITY: St. George

Email: 0

STATE: Utah

SUBDIVISION, LOT :

ZIP: 84790

PARCEL

Color: White

The proposed amount includes the following: Over Main Entrance

Remove Cap Metal & TPO from the Parapet Walls, Install Versico 60 Mil TPO Membrane Mechanically Fastened over 1/2" EPS Fanfold Cover Board over presloped & crickets Existing TPO deck substrate with: Screws Plates , 60 mil TPO Flashings Reinstall TPO With Bonding Adhesive for walls & curbs , Reinstall Cap Metal, TPO Clad metal Scuppers

We Propose hereby to furnish material and labor in accordance with above specifications, for the sum of:

\$134,843.00

ADDITIONAL OPTIONS:

Payment is due upon completion of work. Past due balances will be subject to 2% interest, per month.

1. Better Roofing Systems, Inc. (BRS) will provide the services and materials described in this Proposal. All prices set forth herein are based on standard colors and a standard quality product. If a higher quality product or color is requested, then the price will be increased for the added cost of the product. This Proposal is subject to all the terms and conditions contained on the reverse side of this document. This Proposal, the terms contained on the reverse of this Proposal, and any changes and modifications set forth in written change orders or actually performed by BRS shall constitute the Agreement between Better Roofing Systems, Inc. and the Customer.

2. The name of the Customer is _____, the address of the property is _____, which is more particularly described as _____ (legal description) (hereinafter the "Subject Property").

3. Customer shall not give instructions or orders directly to employees or workmen of Better Roofing Systems, Inc. except to persons designated as authorized representatives of Better Roofing Systems, Inc. Customer designates the following as authorized agents to direct Better Roofing Systems, Inc. and to communicate with Better Roofing Systems, Inc. on behalf of Customer and to receive notice on behalf of Customer:

Better Roofing Systems, Inc.

By: Mark Osness
Dated: Over Main Entrance

This Proposal is subject to review by Better Roofing Systems, Inc. if not accepted within 60 days.

ACCEPTANCE OF AGREEMENT

I have read the foregoing and the terms and conditions contained on the reverse of this Proposal and by my signature do hereby agree to the foregoing and all terms and conditions. BRS is authorized to do the work as specified. Payment will be made as outlined.

CUSTOMER Dated: _____

EXPECTED DATE ROOFING MATERIALS NEEDED

Guarantor Dated: _____

After Proposal Change Orders:

Customer Initials _____ Dated: _____

Mark's Initials _____ Dated: _____

Additional Cost: _____



ROOFING PROPOSAL

BETTER ROOFING SYSTEMS, INC.

MAILING Address: P.O. BOX 460996, LEEDS, UT 84746

CELL (435) 703-2677 Email: betterroofingsystems@yahoo.com

Utah License No. 1275235-5501 * Nevada License No. 0050237 (Monetary Limit of \$525,000) * Arizona License No. ROC186769

Residential * Commercial * Tile * Asphalt * Flat * Metal

PROPOSAL SUBMITTED TO: George Washington Acade DATE: 5/9/23

North West & Library PHONE: 0

OWNER: George Washington Academy

CELL: 0

STREET 2277 S. 3000 E.

FAX: 0

CITY: St. George

Email: 0

STATE: Utah

SUBDIVISION, LOT :

ZIP: 84790

PARCEL

Color: White

The proposed amount includes the following: North West & Library

Remove Cap Metal & TPO from the Parapet Walls, Install Versico 60 Mil TPO Membrane Mechanically Fastened over 1/2" EPS Fanfold Cover Board over presloped & cricketed ExistingTPO deck substrate with: Screws Plates , 60 mil TPO Flashings Reinstall TPO With Bonding Adhesive for walls & curbs , Reinstall Cap Metal, TPO Clad metal Scuppers

We Propose hereby to furnish material and labor in accordance with above specifications, for the sum of:

\$111,517.00

ADDITIONAL OPTIONS:

Payment is due upon completion of work. Past due balances will be subject to 2% interest, per month.

1. Better Roofing Systems, Inc. (BRS) will provide the services and materials described in this Proposal. All prices set forth herein are based on standard colors and a standard quality product. If a higher quality product or color is requested, then the price will be increased for the added cost of the product. This Proposal is subject to all the terms and conditions contained on the reverse side of this document. This Proposal, the terms contained on the reverse of this Proposal, and any changes and modifications set forth in written change orders or actually performed by BRS shall constitute the Agreement between Better Roofing Systems, Inc. and the Customer.

2. The name of the Customer is _____, the address of the property is _____, which is more particularly described as _____ (legal description) (hereinafter the "Subject Property").

3. Customer shall not give instructions or orders directly to employees or workmen of Better Roofing Systems, Inc. except to persons designated as authorized representatives of Better Roofing Systems, Inc. Customer designates the following as authorized agents to direct Better Roofing Systems, Inc. and to communicate with Better Roofing Systems, Inc. on behalf of Customer and to receive notice on behalf of Customer:

Better Roofing Systems, Inc.

By: Mark Osness

Dated: North West & Library

This Proposal is subject to review by Better Roofing Systems, Inc. if not accepted within 60 days.

ACCEPTANCE OF AGREEMENT

I have read the foregoing and the terms and conditions contained on the reverse of this Proposal and by my signature do hereby agree to the foregoing and all terms and conditions. BRS is authorized to do the work as specified. Payment will be made as outlined.

CUSTOMER _____ Dated: _____

EXPECTED DATE ROOFING MATERIALS NEEDED

Guarantor _____ Dated: _____

After Proposal Change Orders:

Customer Initials _____ Dated: _____

Mark's Initials _____ Dated: _____

Additional Cost: _____



Proposal

Utah License: 357752-5501

Arizona License: ROC200247

DATE: 05/17/23

CUSTOMER	George Washington Academy	JOB NAME	George Washington Academy
ADDRESS		JOB ADDRESS	2277 S 3000 E St George, UT 84790
PHONE		OWNER	
CELL		PERMIT #	
FAX		SCR #	
EMAIL		ALT CON	

Project Scope of Work:

Flat Roof Areas

We propose to clean and prepare existing roof surface
 Install a layer 4oz Poly separation sheet over existing roof
 Install the Carlisle 60 mil TPO mech fastened roof system (white or tan in color)
 Install new cap metal flashing or termination bar flashing
 Re use existing roof drains (if possible) any drains not reusable to be replaced by plumber as change order
 20 Yr 55 MPH Manufacturers Warranty
 Clean roof debris

Yellow roof areas as per provided map Price \$ 131,127.00
Pink roof areas as per provided map Price \$ 105,378.00

Add 4% to above prices for Performance & Labor Bonds
Any deck replacement required to be handled as change order

Terms: Progress Payments

We propose to furnish labor and materials in accordance with the scope of work noted above for the sum of:
Dollars _____

Gregg Nuss 435 632-4051
 (Stout Roofing, Inc. Authorized Signature)

This proposal is good for 30 days.

ACCEPTANCE OF PROPOSAL

By signature below, the undersigned accepts the proposed scope of work as outlined above, agrees to the terms and conditions as set forth on page two of this proposal document, and freely enters into this contractual agreement with Stout Roofing, Inc.

Owner / Agent _____ **Date** _____

529 N 600 W St. George, UT 84770 (t) (435) 635-4288 (f) (435) 688-0132

Terms and Conditions

Materials -- All materials shall be as specified in this Proposal.

Services -- All work will be completed in a workmanlike manner according to standard practices. The services contemplated in this Contract are expressly limited to those items contained in this Proposal. If Stout Roofing, Inc. ("Stout") is required to return to perform modifications or repairs to the roof due to the work of or damages caused by the owner of the property where work was performed, ("Owner") or an agent of the Owner ("Agent"), original contractor, another subcontractor, or anyone else not an agent of Stout or due to changes made by the Owner/Agent or anyone else, the work will become an extra charge over and above this Proposal and the undersigned will be responsible for payment for the extra work over and above this Proposal, whether or not the extra work is evidenced by a change order.

Structure -- Stout is not responsible for the structural engineering or soundness of the structure. Any extra cost to perform the services contained in this Proposal due to the building's structural irregularity shall be paid by the undersigned over and above this Proposal. Stout shall inform Owner/Agent in writing of the extra costs associated with any irregularity within a reasonable time from Stout's discovery of the irregularity. Owner/Agent shall have 24 hours to accept or reject the extra costs. If accepted, the extra cost shall be considered an authorized extra and will become an extra charge over and above this Proposal. If rejected, Owner/Agent shall notify Stout immediately that the services are terminated and shall pay Stout in full for all services and materials rendered up to that point and Stout shall have no further obligations therewith.

Modifications -- Any changes or modifications in this Agreement shall be binding upon Owner/Agent when performed by Stout. All costs associated with any change, modification or any extra work performed by Stout is over and above this Proposal and shall be paid in full by Owner/Agent whether or not the work is evidenced by a change order.

Other Subcontractor Work -- Stout is not responsible for problems or damages created by the Owner/Agent, other subcontractors or anyone else who is not an agent of Stout. If, after Stout has completed the services contained in this Proposal, Stout is required to return to the structure to perform services necessitated by the actions of someone who is not an agent of Stout or which are necessitated by forces beyond the reasonable control of Stout, Stout shall be compensated for the additional services and they will become an extra charge over and above this Proposal whether or not the work is evidenced by a change order.

Roofing Material Weight -- Stout provides no advice concerning, and does not warrant, the structure's ability to tolerate the weight of the roofing material selected for the structure.

Liability -- Stout is not liable for damages resulting from delay in the installation of the roof which is caused by the Owner/Agent, another subcontractor, anyone else that is not an agent of Stout, or caused by elements not in the reasonable control of Stout. Stout is not liable for any damage to the roof occasioned by the actions of the Owner/Agent, another subcontractor, or anyone else that is not an agent of Stout. Stout is not responsible for acts of God if the roof is installed pursuant to manufacturer, industry or government specifications.

Acknowledgment -- Owner/Agent acknowledges that in the case of new construction the services contained in this Proposal cannot be completed until certain work is completed by other subcontractors including, but not limited to, framing, sheeting, rough plumbing and rough electrical.

Contingency -- Stout has no duty to perform the services contained in this Proposal in the event of a strike, accident or delay beyond the reasonable control of Stout.

Owner/Agent Insurance -- Owner/Agent is required to carry fire, tornado and any other insurance necessary for the project.

Workman's Compensation Insurance -- All Stout workers are fully covered by Workers Compensation Insurance. Certificates of Workers Compensation insurance are available upon request.

General Liability Insurance -- Stout is covered by General Liability Insurance. Certificates of General Liability insurance are available upon request.

Timely Payment -- Unless otherwise specified in the terms section of this Agreement, payments are due within _____ days of the date of the Invoice and are not conditioned upon any modification or repair. If payment is not received within the stated period, the balance due on the Invoice will begin to accrue interest at the rate of 1.5% per month until fully paid. Failure to pay an Invoice within the stated period constitutes a material breach of this Agreement and Stout may suspend performance until the Invoice plus interest, costs and fees are fully paid.

Collection Fees -- In the event any lien or other collection procedure is brought for the enforcement of this Agreement, Stout shall be entitled to recovery of all collection costs and attorney's fees associated with the procedure.

Mediation -- Any and all disputes arising out of or related to this Agreement or either parties' performance, or failure to perform, hereunder shall be submitted to mediation before a mutually-accepted mediator prior to initiation of arbitration, litigation or any other binding or adjudicative dispute resolution process. The parties shall share mediator, venue, and related costs equally. Venue of the mediation shall be the State of Utah in Washington County. In the event the parties are unable to agree upon a mediator, the Fifth Judicial District Court, in and for Washington County, Utah, shall appoint the mediator. This mediation provision shall be specifically enforceable according to its terms, including but not limited to an action to enforce in whole or in part this Agreement.

Attorney Fees -- If any legal action or other proceeding is brought for the enforcement of this Agreement, or because of an alleged dispute, breach, default, or misrepresentation in connection with any of the provisions of this Agreement, the successful or prevailing party or parties shall be entitled to recover reasonable attorney's fees and other costs incurred in that action or proceeding, in addition to any other relief to which it or they may be entitled.

Governing Law -- This Agreement shall be governed by and construed in accordance with the laws of the State of Utah.

Binding Effect -- This Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective heirs, successors, executors, administrators, and assigns.

Stout Roofing's Warranty -- This Warranty is made subject to the following terms and conditions: Specifically excluded from this Warranty are damages to work and other parts of the building, and to building contents caused by: lightning; peak gust wind speed exceeding 70 mph; fire; failure of roofing system substrate, including cracking settlement, excessive deflection, deterioration, and decomposition; faulty construction of parapet walls, copings, chimneys, skylights, vents, equipment supports, and other edge conditions and penetrations of the work; vapor condensation on bottom of roofing; and activity on roofing by others, including construction contractors, maintenance personnel, other persons, and animals, whether authorized or unauthorized by Owner.

When work has been damaged by any of the foregoing causes, Warranty shall be null and void until such damage has been repaired by Stout Roofing and until cost and expense thereof have been paid by Owner or by another responsible party so designated.

Stout Roofing is responsible for damage to work covered by this Warranty but is not liable for consequential damages to building or building contents resulting from leaks or faults or defects of work

During Warranty period, if Owner allows alteration of work by anyone other than Stout Roofing, including cutting, patching, and maintenance in connection with penetrations, attachment of other work, and positioning of anything on roof, this Warranty shall become null and void on date of said alterations, but only to the extent said alterations affect work covered by this Warranty. If Owner engages Stout Roofing to perform said alterations, Warranty shall not become null and void unless Stout Roofing, before starting said work, shall have notified Owner in writing, showing reasonable cause for claim, that said alterations would likely damage or deteriorate work, thereby reasonably justifying a limitation or termination of this Warranty.

During Warranty Period, if original use of roof is changed and it becomes used for, but was not originally specified for, a promenade, work deck, spray-cooled surface, flooded basin, or other use or service more severe than originally specified, this warranty shall become null and void on date of said change, but only to the extent said change affects work covered by this Warranty.

Owner / Agent _____

Date _____

SKYLINE ROOFING, INC.

Po. Box 368

Hurricane, UT 84737

Phone: 435.467.7603

Fax: 435.635.3223

UT Lic# 6483891-5501

Proposal

DATE: 5/18/2023

PHONE: 435-673-2232

FAX:

Email: jbentley@gwacademy.org

JOB NAME: George Washington Academy

JOB LOCATION: 2277 S. 3000 W.
St. George, UT 84790

JOB CONTACT: Jessica Bentley

WE HEREBY SUBMIT SPECIFICATIONS AND ESTIMATES FOR:

Number and remove existing parapet cap, set aside for reinstallation.
Remove existing membrane from parapet walls and flashings from vents and units. Clean and haul away debris.
Cut existing membrane every 10 feet to relieve tension on membrane.
Supply and install 60 mil TPO membrane mechanically fastened over poly-separation sheet over existing membrane with new flashings on vents and units and fully adhere membrane up and over parapet walls.
On CMU (cinder block) walls where the roof ties into second story, cut a groove into the block mortar and install new counter flashing with termination bar and polyurethane caulk.
20-year full system warranty from Carlisle.
2-year workmanship warranty.

Price,

Area 1, \$140,700.00

Area 2, \$103,900.00

Fibertite Membrane instead of TPO Price.

Area 1, \$141,700.00

Area 2, \$103,900.00

Fibertite is a KEE membrane the is full fabric reinforced. It is worth researching as it is proving to be much better than other membranes.

All material is guaranteed to be as specified and will be completed according to standard practices. Any alteration or deviation from above specifications involving additional costs will be executed only upon written orders, and will include an extra charge in addition to the estimate given. All agreements are contingent upon strikes, accidents or delays beyond our control. Owner to carry fire, tornado, and other necessary insurance. Our workers are fully covered by Workman's Compensation Insurance.

Past due & delinquent amounts are subject to finance charge at the rate of 1 1/2% per month annual percentage rate of 18%. All costs, including Sellers actual attorney's fees and all other expenses incurred in the collection of the Buyer(s) account will be paid by Buyer(s). Any claim by Buyer against Seller based wholly or in part upon or any manner related to this agreement shall be made in writing and delivered to Seller within 30 days after the date of sale, otherwise such claims shall be waived.

ACCEPTANCE OF PROPOSAL. The above prices, specifications and conditions are satisfactory and are hereby accepted. Signature of this proposal authorizes work to be completed as specified. Payment will be made as stated above.

Date of Acceptance: _____

Buyer(s) Signature: _____



PROPOSAL FOR BOARD ACTION

Proposal Title: 2023-2024 GWA Early Learning Plan

Submitted by: Christine Giles

Sponsoring Committee: n/a

Situation: To receive annual funding from our Early Learning Plan, a plan must be developed and submitted to the State after Board approval. The proposed plan including math and reading components has been pre-approved by the state in June 2023.

Background: George Washington Academy has previously received revenue from the State to support the funding for our K-3 Instructional Aides and Reading Specialist as well as professional development related to reading instruction.

Assessment: It has been determined from data-analyzing with Acadience Math and Reading scores, the following goals will be implemented for this school year.

1. By June 1, 2024, first grade teachers will increase the percentage by 3% of first grade students scoring at or above benchmark on Acadience Composite from BOY to EOY by providing ongoing professional learning (LETRS) and job-embedded instructional coaching for Tier 1 instruction utilizing the CKLA Skills curriculum and Heggerty with fidelity in phonemic awareness, segmenting and blending sounds, and phonics instruction to increase the likelihood of students scoring at/above benchmark at the end of year.
2. By June 1, 2024, First grade teachers will maintain the percentage of students scoring at/above the benchmark on Acadience Math Computation from BOY to EOY by providing Tier 1 instruction by utilizing the HMH Into Math curriculum and resources with fidelity to develop a strong foundation in student's math computation skills.
3. By June 1, 2024, second-grade teachers will increase the percentage by 3% of second-grade students' proficiency scoring at or above the benchmark on Accuracy (ORF) from BOY to EOY by providing Tier 1 and Tier 2 explicit instruction utilizing the CKLA Skills and Heggerty curriculum and resources with fidelity in phonemic awareness, segmenting and blending sounds, phonics instruction, LEXIA usage and reading CVC words fluently to increase the percentage of students who will demonstrate proficiency in Accuracy.

Recommendation:

It is recommended that the Board approve the Early Learning Plan as written so that it may be submitted to the State to acquire needed funding for our Early Learning program at George Washington Academy.



EARLY LEARNING PLAN 2023-2024

LEA Name: George Washington Academy

Date of Expected Local Board Approval: July 27, 2023

Directions:

- To support LEAs in the successful completion of this plan, a Look Fors Document has been created and can be found here: <https://docs.google.com/document/d/1TB91xNYFzQs-t5cO1sPhmjz5Pmcehr0/edit?usp=sharing&oid=111364743146836537372&rtpof=true&sd=true>
- Submission of an Early Learning Plan (sections A, B, and C) is required for each LEA regardless of applying for funding.

Funds Being Applied for: Check all that apply. (*Estimated Funding and Matching Amounts*)

✓ Early Literacy Program Funds

DISTRICT ONLY - Matching Funds:

Program	Amount Matching	Levy Type
<input type="checkbox"/> Low Income Program	n/a	n/a
<input type="checkbox"/> Guarantee Program	n/a	n/a

Submission of Early Learning Plan: [Pathways to Early Learning Program \(ELP\) Plan Submission and Approval](#)

- Submission on or before August 1st: For ELP **preapproval**, submit the following to earlylearning@schools.utah.gov by August 1st.
 - ELP Plan as a WORD document

- Submission after August 1st: For ELP final approval, submit the following in [Utah Grants](#) no later than September 1st by 5 p.m.
 - Early Literacy budget,
 - Final ELP plan (as an attachment),
 - Local board minutes (as an attachment)
- Goals must be submitted into the [Data Gateway - Early Literacy Page](#) no later than September 1st by 5 p.m.

SECTION A: EARLY LITERACY

1. List your evidence-informed core curriculum program(s) for grades K-3 literacy in the following areas:

**SB 127: Districts and charters are required to provide instructional materials that are evidence-informed for core instruction and evidence-based for intervention and supplemental instruction.*

Core Area	*Evidence-Informed Curriculum(s) (defined in SB 127 as: (i) is developed using high-quality research outside of a controlled setting in the given field, and (ii) includes strategies and activities with a strong scientific basis for use)	
	General Education	Special Education
Phonological Awareness	Core Knowledge Language Arts Heggerty	Reading Mastery
Phonics	Core Knowledge Language Arts	Reading Mastery
Fluency	Core Knowledge Language Arts	Reading Mastery
Vocabulary	Core Knowledge Language Arts	Reading Mastery
Comprehension	Core Knowledge Language Arts	Reading Mastery
Oral Language	Core Knowledge Language Arts	Reading Mastery
Writing	Core Knowledge Language Arts	Reading Mastery

2. List the assessments used in K-3 literacy for each section below.

**SB 127: If Acadience Reading or a supplemental reading assessment indicates a student lacks competency in a reading skill, or is behind other students in the student's grade in acquiring a reading skill, the school district or charter school is required to administer diagnostic assessments to the student to target interventions to meet students' individual needs.*

Screeener(s):
Acadience Reading Benchmark

Diagnostic(s):

**Defined in SB 127: "Diagnostic assessment" means an assessment that measures key literacy skills, including phonemic awareness, sound-symbol recognition, alphabet knowledge, decoding and encoding skills, and comprehension, to determine a student's specific strengths and weaknesses in a skill area.*

PAST, PSI, PASI, CORE Phonics

Progress Monitoring:

**SB 127: Districts and charters are required to administer formative assessments and progress monitoring at recommended levels for the benchmark assessment to measure the success of the focused intervention;*

Acadience Reading

3. List your K-3 tier 2 and tier 3 evidence-based literacy curriculum programs and/or strategies and answer the question below.

**SB 127: Districts and charters are required to provide instructional materials that are evidence-informed for core instruction and evidence-based for intervention and supplemental instruction.*

**Evidence-based is defined in SB 127 as: means that a strategy demonstrates a statistically significant effect, of at least a 0.40 effect size, on improving student outcomes based on: (i) strong evidence from at least one well-designed and well-implemented experimental study or (ii) moderate evidence from at least one well-designed and well-implemented quasi-experimental study.*

Tier 2 Evidence-based Curriculum Program(s) and/or strategies:

CKLA (Assessment and Remediation Guide), LETRS Strategies and 95% Intervention. Explicit phonics and fluency instruction in small groups with the trained Reading Interventionist daily for 30 minutes and progress monitor every 2-4 weeks

Tier 3 Evidence-based Curriculum Program(s) and/or strategies:

Reading Mastery, 95% Intensive Intervention and Explicit Phonemic Awareness. Explicit phonemic awareness and phonics instruction in small groups with the reading specialist daily for 45 minutes and progress monitor every 1-2 weeks

Briefly describe how you ensure intervention is aligned to students' needs?

Based on the outcomes of the diagnostic assessment given for each student, we assign the intervention program, 95% to meet the specific skill deficits.

SECTION B: EARLY MATHEMATICS

1. What evidence-based curriculum is being used in tier 1 core instruction for K-3 mathematics?

2. Describe how the following mathematical components are incorporated in tier 1 instruction in grades K-3.

Mathematical Components	Evidence-based Strategies
<p>Conceptual Understanding: the comprehension and connection of concepts, operations, and relations.</p>	<p>Into Math has a progression of topics that build a foundation of conceptual understanding before teaching procedures. The application throughout each unit is through the “Learning Arc” where students build an understanding of a concept, then connect concepts and skills before applying and practicing them.</p>
<p>Procedural Fluency: the meaningful, flexible, accurate, and efficient use of procedures to solve problems.</p>	<p>How materials build procedural fluency - Every module begins with language development to learn the vocabulary of the unit. Next, each lesson begins with a motivational, three-read of the problem, allowing students to work together to solve the problem, turn and talk, and build shared understanding. Students are allowed to solve problems in many different ways through pictures, manipulatives, or algorithms. Each student has access to a colorful worksheet to work through the problems. Students learn together with teacher modeling, picture/manipulative practice, conceptual writing of the numbers and algorithms, then turn and talk to check for understanding. Practice is given through pictures, fill in the answer, and lastly an “On Your Own” time. Reflection and checking student learning mindset are embedded within the lesson to solve the problems.</p>
<p>Strategic and Adaptive Mathematical Thinking: the ability to formulate, represent, and solve mathematical problems with the capacity to justify the logic used to arrive at the solution.</p>	<p>Students are given manipulatives to represent the math concept and then draw it. Next students apply the numbers into the abstract to formulate a solution. Then, students are given opportunities to verbalize concepts through guided discussion (turn and talk). Time is given to practice. Students again verbalize or write how they created and solved a problem.</p>
<p>Productive Disposition: the ability to see mathematics as useful and worthwhile while exercising a steady effort to learn mathematics.</p>	<p>Into Math begins each lesson by using language routines and key vocabulary that provides opportunities for students to listen for, speak, read, and write about mathematical situations. In doing so, it helps students activate prior knowledge, think critically, and develop collaboration within a group.</p> <p>Each module has a STEM connection where students may individually or collaboratively apply the learning. It provides ways to integrate the standard through music and art. In addition, the module provides a social-emotional component through growth mindset skills and focus.</p>

3. Briefly discuss how mathematics assessments (screeners, diagnostics, and progress monitoring) are used to make instructional decisions and how they are used to ensure that instruction and interventions are aligned to students’ learning needs.

Acadience Math – Benchmarks, Progress Monitoring – informs core instruction as well as intervention decisions to meet the essential state standard as deemed by the individual grade-level team.

KEEP - Math assessment to determine the baseline of students' mathematical knowledge and understanding.

Common Formative Assessments within each grade level as designed by the grade-level team. Utilizes HMH Into Math assessments (Are you Ready) and aligns the focus of teaching the essential state standard as chosen by the team to diagnose and identify student needs and interventions.

4. List your K-3 tier 2 and tier 3 mathematics intervention programs/strategies and answer the question below.

Tier 2 Intervention Program(s)/strategies:

Program: HMH Into Math Differentiated Instruction and Intervention Materials.

Strategies: Students are grouped based on skill mastery or deficiencies. All teachers will deliver instruction with fidelity. Students may receive remediation or extension based on the data the team gathers for certain math skills.

Moby Max is also utilized to support learning and close learning gaps.

Tier 3 Intervention Program(s)/strategies:

Program: Number Worlds

Strategies: Daily lesson activities emphasize using communication, logic, reasoning, modeling, tools, precision, structure, and patterns to solve problems.

Briefly describe how you ensure intervention is aligned to students' needs?

Based on the outcomes of the Acadience Math screener and additional diagnostic assessments (HMH Benchmark Assessments) given for each student demonstrating intervention needs, we assign an intervention program that builds on the strengths the student exhibited in their assessment.

SECTION C: LOCAL GOALS

Goals must be measurable, address current performance gaps in student literacy and math data, and include specific strategies for improving outcomes.

Videos to support goal writing: [Analyzing Data and Identifying Areas of Need](#) and [Writing Goals](#)

Goal Sentence Frame:

By [date], [who is responsible] will [what will change and by how much--measurable] by [how--which evidence-based strategy(ies) will be used] to [why—for what purpose].

1. Early Literacy Goal *(required)*

By June 1, 2024, first grade teachers will increase the percentage by 3% of first grade students scoring at or above benchmark on Acadience Composite from BOY to EOY by providing ongoing professional learning (LETRS) and job-embedded instructional coaching for Tier 1 instruction utilizing the CKLA Skills curriculum and Heggerty with fidelity in phonemic awareness, segmenting and blending sounds, and phonics instruction to increase the likelihood of students scoring at/above benchmark at the end of year.

2. Early Mathematics Goal *(required)*

By June 1, 2024, First grade teachers will maintain the percentage of students scoring at/above the benchmark on Acadience Math Computation from BOY to EOY by providing Tier 1 instruction by utilizing the HMH Into Math curriculum and resources with fidelity to develop a strong foundation in student's math computation skills.

3. Early Literacy or Mathematics Goal *(required)*

Literacy Goal

Mathematics Goal

By June 1, 2024, second-grade teachers will increase the percentage by 3% of second-grade students' proficiency scoring at or above the benchmark on Accuracy (ORF) from BOY to EOY by providing Tier 1 and Tier 2 explicit instruction utilizing the CKLA Skills and Heggerty curriculum and resources with fidelity in phonemic awareness, segmenting and blending sounds, phonics instruction, LEXIA usage and reading CVC words fluently to increase the percentage of students who will demonstrate proficiency in Accuracy

General Assurances: *Check the box below.*

The LEA assures that it is in compliance with State Code [53F-2-503](#), [53E-4-307.5](#), [53G-7-218](#), [53E-3-521](#) and Utah Board Rule [R277-406](#) applicable to this program.

By submitting this form, I certify the information I provided on and in connection to this application is true, accurate and complete. I also understand that any false statements on this application I file with the Utah State Board of Education may be grounds for disqualification for Early Literacy Program funds.



PROPOSAL FOR BOARD ACTION

Proposal Title: Policy 515 - Kindergarten Policy

Submitted by: Debbie Kauvaka (Policies Committee)

Originating Committee: Policies Committee

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

Situation:

Due to new state requirements of requiring all LEAs to offer half-day Kindergarten we need to create a policy clarifying how this looks at GWA.

Background Information, including a list of reviewing committees:

The state passed a bill that requires all LEAs to offer half-day Kindergarten and to have a policy in place for the new school year.

Assessment:

Recommendation:

Approve the submitted policy.

Please submit this form with all accompanying paperwork to the Board Secretary, Deborah Odenwalder, at dodenwalder@gwacademy.org by the 15th day of the month of the Board meeting.

515 – Kindergarten Policy



George Washington Academy (GWA) offers full-day Kindergarten to all students. At the request of a parent or in collaboration with administration, half-day Kindergarten will be available with Administration approval. Half-day Kindergarten will be offered in the morning which is when all required content is taught.



PROPOSAL FOR BOARD ACTION

Proposal Title: Policy 565 - Instructional and Supplemental Materials Policy

Submitted by: Debbie Kauvaka (Policies Committee)

Originating Committee: Policies Committee

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

Situation:

Due to new legislation we are required to create a policy regarding Instructional and Supplemental Materials. It lays out the process for reviewing and challenging supplemental materials. We used a policy created by another school and adapted it to GWA's structure. This policy is required to be in place by July 31st.

Background Information, including a list of reviewing committees:

Assessment:

Recommendation:

Approve the submitted policy with its accompanying Request for Review of Supplemental Materials form. This will replace current Policy 590 Textbook and Instructional Materials Policy.

Please submit this form with all accompanying paperwork to the Board Secretary, Deborah Odenwalder, at dodenwalder@gwacademy.org by the 15th day of the month of the Board meeting.

1. **Purpose:**

George Washington Academy (GWA) will adopt learning materials that are in alignment with the GWA charter and with content and instructional philosophies of the Utah State Core Curriculum and Utah Effective Teaching Standards. These materials will be used as the principal source of study and provide comprehensive coverage of course content.

2. **Policy:**

Students will have access to current and legally compliant learning materials. GWA will follow efficient adoption and review procedures outlined in this policy for all content areas.

3. **Definitions:**

- a. "Learning material" means any learning material or resource used to deliver or support a student's learning, including textbooks, reading materials, videos, digital materials, websites, and other online applications used for any purpose, excluding the school library. This includes in-classroom collections, sometimes referred to as "Classroom Libraries." Learning material includes "instructional material" and "supplemental material" as defined below.
- b. "Instructional material" means learning material that the GWA Board adopts and approves for use within the George Washington Academy.
- c. "Supplemental material" means learning material that:
 - i. an educator selects for classroom use; and
 - ii. the GWA Board has not considered and adopted, approved, or prohibited for classroom use within the school.
- d. "Sensitive material" means a material that is pornographic or indecent material as that term is defined in UCA §76-10-1235.
 - i. For the purpose of this policy, sensitive material also includes material that promotes suicidal ideation, parasuicide or self-harm; or contains content not age appropriate for the school's age group due to vulgarity or violence; when:
 1. taken as a whole, does not have serious value for minors.
 2. Serious value includes only serious literary, artistic, political or scientific value for minors.
 - ii. "Sensitive material" does not include non-fiction material:
 1. for medical courses;
 2. for family and consumer science courses; or
 3. for another course the Utah State Board of Education ("USBE") exempts in USBE rule.
 4. Non-fictional material exempted under this section may contain fictional components used to explain a concept.

565 - Instructional and Supplemental Materials Policy (cont.)

- e. “Age Appropriate” means generally suitable for students of the same age or level of social, emotional, and cognitive development when taking into consideration the ages of all minors who will be exposed to the material.
- f. “Prohibited material” means:
 - i. sensitive material,
 - ii. or any material that has been identified by the GWA Board, Administration or the GWA Supplemental Material Review Committee as prohibited for classroom use.
- g. “Challenge” means a request for review of learning material found in the school, excluding the library, and used for an instructional purpose. An individual with standing may challenge material by filing Form 565F1, “Request for Review of Supplemental Materials” form.
- h. “Supplemental Material Review Committee” means a school committee created to review challenges to supplemental material within the school. The Supplemental Material Review Committee shall be composed of at least six (6) members:
 - i. The Assistant Director of Academics, who shall serve as chair for the committee.
 - ii. One (1) of the following: School Counselor, School Psychologist, School Social Worker, or if unavailable, another Staff Member selected by the chair from the school.
 - iii. Two (2) parents recommended by the school’s Community Council.
 - iv. Two (2) Certified Teachers, selected by the chair, from the department, or grade level, where the materials are used.
 - v. The Supplemental Material Review Committee shall not include the individual, or a member of the individual’s household, who has challenged the material.
- i. “Standing” means the right to challenge learning materials at GWA.
 - i. Only parents and guardians, employees, and board members, with constituents that are currently enrolled and attending, have standing to challenge learning materials.
- j. “Constituents” means the individuals attending George Washington Academy.
- k. “Content Standards” mean the Utah State Core Curriculum and Utah Effective Teaching Standards.
- l. “Open-ended resource” means any online learning material that GWA does not contract with to provide services, does not control, and contains a potentially infinite number of accessible materials.

4. Learning Material selection and deselection

- a. Learning material shall be selected by each educator in compliance with this policy.
- b. Educators should first consider learning material within the USBE Recommended Instructional Materials (“RIMS”) for any selection.
- c. Prohibited materials shall not be selected as learning material.
- d. All learning materials used must be directly related to the Utah Core Content Standards.
- e. Educators must exercise caution when selecting learning materials and shall ensure that such materials are age-appropriate and align with the school's educational goals and community standards.
- f. Any learning material that is deemed inappropriate or not aligned with the Utah Core Content Standards shall not be used.

565 - Instructional and Supplemental Materials Policy (cont.)

- g. If an educator is uncertain whether learning material is prohibited by law, the educator must consult with the Executive Director or designee before using it.
- h. Learning material that is software or online tools are subject to the same review as any other supplemental or instructional material..
- i. In compliance with UCA §53G-4-402 (24)(e), any contract for learning material that is online or digital materials must include a provision that the provider give notice to GWA for any material changes, excluding regular informational updates on current events.
- j. Supplemental material
 - i. GWA shall have the discretion to select learning materials for use by the school. GWA may select learning materials recommended by the USBE or other learning materials it considers appropriate to teach the standards.
 - ii. GWA must follow all established purchasing and inventory procedures.
 - iii. In compliance with UCA §53G-4-402 (24)(a)(iii)(B), nothing in this policy shall prohibit GWA from prohibiting specific material within schools.
 - iv. Any use of open-ended resource requires that the educator:
 - 1. Use GWA approved digital citizenship practices.
 - 2. Provide appropriate supervision.
 - 3. Provide appropriate Internet Content Filtering.
 - 4. For open-ended resources, educators may only use those approved through GWA’s software approval process.
 - v. A person with standing may challenge an educator’s use of supplemental material in accordance with the procedures outlined in Section 6 of this policy.
- k. Instructional material
 - i. Learning material selected or supported at the school level is considered instructional material and must be adopted and approved by the school board in an open meeting in compliance with UCA §53G-4-402.
 - ii. Selection will be handled by the Curriculum Committee, established by the GWA Board.
 - iii. Learning material currently being recommended for adoption will be announced on the board meeting agenda.
 - iv. At least two public meetings will be held before adopting or approving the learning material to provide two opportunities for GWA educators and parents of students enrolled in GWA to express views and opinions on the recommendation prior to Board adoption. Once learning materials have been adopted by the Board, they are “instructional materials.”
- l. Deselection and Removal
 - i. Any Learning material identified as Sensitive material or Prohibited material under this policy, shall also be removed from use as Learning material.
 - ii. Materials may be deselected
 - 1. That do not meet the requirements for material selection,
 - 2. do not currently align or relate to the subject curriculum or educational goals of the course.

5. Transparency

- a. All Instructional material used by George Washington Academy shall be readily accessible and available for a parent to view, in compliance with UCA §53G-4-402 (24)(b)(i). Content formats and access rights may vary, therefore we commit to making material, at a minimum, accessible at GWA onsite in physical or digital format upon prior appointment.

6. Procedure for Review of Learning Material

- a. Because instructional material is adopted by the Board following public notice and public input, instructional materials may not be challenged. Supplemental material may be challenged by a person with standing in accordance with the procedures set forth below.
- b. The school official or staff member receiving a complaint about supplemental material being used by an educator in a school shall refer the individual to the educator using the supplemental material. The educator will meet with the individual and explain the intended purpose and use of the supplemental material in question.
- c. If the individual is not satisfied after meeting with the educator, the individual shall be referred to the executive director.
- d. If, after an informal meeting with the executive director, the individual wishes to file a Request for Review of Supplemental Materials, formally challenging the supplemental material, the executive director or designee shall provide and explain the procedures in this policy.
- e. Individuals with continued objections to supplemental material shall:
 - i. read or review the supplemental material as a whole before filing a Request for Review of Supplemental Materials.
 - ii. consider the criteria for selecting learning material as explained.
- f. If the individual chooses to file the form in a formal challenge, the individual must articulate the basis for the challenge. Individuals seeking to challenge material shall complete the process outlined in this policy for each challenged material.
- g. Upon receipt of the completed Request for Review of Supplemental Materials Form, the Executive Director or designee shall form and convene the Supplemental Material Review Committee for supplemental materials.
- h. Supplemental Material Review Committee Review Process
 - i. Each member of the Supplemental Material Review Committee shall read challenged supplemental material that is written in its entirety or review the non-written challenged supplemental material as a whole prior to participating in committee discussions or participating in decision making.
 - ii. The Supplemental Material Review Committee will make a determination about the challenged material based only on the following factors:
 1. Whether the supplemental material constitutes sensitive material. In deciding whether the material constitutes sensitive material, the Committee must consider all elements of the definitions of pornographic or indecent materials as defined in Utah Code §76-10-1235, §76-10-1201, §76-10-1203, and §76-10-1227.

2. Whether the supplemental material is age appropriate due to vulgarity and/or violence. In deciding whether the material is age appropriate due to vulgarity and/or violence, the Committee must consider the material taken as a whole and consider whether it has serious literary, artistic, political, or scientific value.
 3. The Committee shall use objective criteria to determine the supplemental materials serious literary, artistic, political, educational or scientific value, and may include reliable, expert reviews of the supplemental material or other objective sources. Those on the Committee may rely on their experience and background and contemporary community standards to determine whether the supplemental material is or is not age appropriate.
- iii. The Supplemental Material Review Committee's decision shall be made by a simple majority of Committee members who participate in the review.
- iv. The Supplemental Material Review Committee shall review no more than two (2) different challenged supplemental materials for every two meetings, thereby allowing Committee members to make sound decisions and to be considerate of Committee members' time.
- v. Potential actions of the Supplemental Material Review Committee may include:
 1. Retain the supplemental material,
 2. Remove the supplemental material from the educator's curriculum, or
 3. Where the supplemental material is being used school-wide, remove the supplemental material from some school classrooms in which the committee determines that the supplemental material is not age appropriate for that course's target student population.
- vi. The Supplemental Material Review Committee shall write a rationale for the committee's decision, including:
 1. Formal findings,
 2. Reason for the recommended action based on the factors identified in this Policy, and
 3. Recommended age-appropriate level (if applicable).
- vii. This rationale shall be provided with the action regardless of the recommended action.
- viii. The Supplemental Material Review Committee Chair shall provide the individual challenging the material with a written decision of the Committee's determination.
- ix. The determination of the Supplemental Material Review Committee shall be documented.
- x. If the supplemental material is being used school-wide and the Supplemental Material Review Committee approves total removal of the material from the School, the challenged supplemental material shall not be selected for future purchases or used in the future within the school.
- i. If the Supplemental Material Review Committee decision is not satisfactory to all parties, said parties shall submit a formal written request for appeal stating their rationale and assessment..
- j. Upon receipt of an appeal, The Supplemental Material Review Committee Chair shall form and reconvene the Supplemental Material Review Committee with the addition of the Executive Director or Board Chair..

565 - Instructional and Supplemental Materials Policy (cont.)

- k. If the Supplemental Material Review Committee determines to retain the challenged supplemental material, the same material may not be subject to a second challenge for at least 3 years.
- l. An individual challenging supplemental material is limited to 3 challenges to materials per school calendar year.
- m. The Supplemental Material Review Committee decisions are final decisions and not subject to appeal through the GWA Board.
- n. If the committee identifies supplemental material that contains sensitive material with no serious value for minors as defined in UCA §76-10-1227 (2)(c)
 - i. The committee should refer that supplemental material to GWA Administration for ratification of the finding, and upon ratification:
 - 1. Removal of the supplemental material throughout George Washington Academy (including the GWA Library).

565F1 – Request for Review of Educational Materials



1. Request initiated by: _____

School _____

Address _____ City _____ Phone _____

2. Request submitted to: _____

3. Brief statement explaining the request: _____

4. Type of material: Website Digital Video/Audio Images: print or digital Book: print or digital

Other: (Specify) _____

5. Have you read, viewed, or listened to the entire material? YES NO

Specify the portion of the material which you question and reasons for your objections: _____

6. What do you think is the effect of this material on students? _____

7. In its place, what material would you recommend? _____

8. What is there of educational value in the suggested replacement? _____

9. What would you like GWA to do about this item?

Do not require my child to use it.

Do not require any child to use it.

Restrict it to certain grade levels. (Specify) _____

Remove from use.

Signature _____ Date submitted: _____



PROPOSAL FOR BOARD ACTION

Proposal Title: Policy 570 - Individual Freedom in Public Education Policy

Submitted by: Debbie Kauvaka (Policies Committee)

Originating Committee: Policies Committee

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

Situation:

Due to new legislation we are required to create a policy surrounding maintaining constitutional freedom in public schools. A model policy was not available so this was created according to the information in the code.

Background Information, including a list of reviewing committees:

This policy needs to be in place by July 31st.

Assessment:

Recommendation:

Approve the submitted policy.

Please submit this form with all accompanying paperwork to the Board Secretary, Deborah Odenwalder, at dodenwalder@gwacademy.org by the 15th day of the month of the Board meeting.

Section 1 - Maintaining constitutional freedom in the public schools:

1. Except as provided in Section [53G-10-206](#), any instructional activity, performance, or display which includes examination of or presentations about religion, political or religious thought or expression, or the influence thereof on music, art, literature, law, politics, history, or any other element of the curriculum, including the comparative study of religions, which is designed to achieve academic educational objectives included within the context of a course or activity and conducted in accordance with applicable rules or policies of the state and GWA may be undertaken.
2. No aspect of cultural heritage, political theory, moral theory, or societal value shall be included within or excluded from public school curricula for the primary reason that it affirms, ignores, or denies religious belief, religious doctrine, a religious sect, or the existence of a spiritual realm or supreme being.
3. GWA may not sponsor or deny the practice of prayer or religious devotionals.
4. GWA officials and employees may not use their positions to endorse, promote, or disparage a particular religious, denominational, sectarian, agnostic, or atheistic belief or viewpoint.

Section 2 - Educational freedom:

1. GWA will provide an annual assurance to the state board that GWA's professional learning, administrative functions, displays, and instructional and curricular materials, are consistent with the following principles of individual freedom:
 - a. the principle that all individuals are equal before the law and have unalienable rights; and
 - b. the following principles of individual freedom:
 - i. that no individual is inherently racist, sexist, or oppressive, whether consciously or unconsciously, solely by virtue of the individual's race, sex, or sexual orientation;
 - ii. that no race is inherently superior or inferior to another race;
 - iii. that no person should be subject to discrimination or adverse treatment solely or partly on the basis of the individual's race, color, national origin, religion, disability, sex, or sexual orientation;
 - iv. that meritocracy or character traits, including hard work ethic, are not racist nor associated with or inconsistent with any racial or ethnic group; and
 - v. that an individual, by virtue of the individual's race or sex, does not bear responsibility for actions that other members of the same race or sex committed in the past or present.
2. Nothing in this section prohibits instruction regarding race, color, national origin, religion, disability, or sex in a manner that is consistent with the principles described in this section.
3. The state board or GWA may not:

570 - Individual Freedom in Public Education Policy

- a. Attempt to persuade a student or instructional or administrative personnel to a point of view that is inconsistent with the principles described in section 2 or
- b. Implement policies or programs, or allow instructional personnel or administrative personnel to implement policies or programs, with content that is inconsistent with the principles described in section 2.