Wallace Stegner Academy

Wallace Stegner Academy provides every student with a rigorous college preparatory education that is specifically designed to help students achieve academic excellence by utilizing rigorous and research-based techniques to improve student learning outcomes. Some of the key elements of our model include:

(i)   Wallace Stegner Academy specifically targets economically disadvantaged minority English Language Learners;

(ii)   data-driven instruction modeled after Uncommon Schools;

(iii)   curriculum developed around measurable goals with formative and summative assessments;

(iv)   scaffolded instruction, defined as lessons designed around the concept that all learning objectives will be taught in a spiral pattern;

(v)   ability-based mathematics, reading, and English language arts programs;

(vi)   reading programs that are phonics-based at first, and later focus on the development of comprehension strategies and metacognition;

(vii)   academic vocabulary is fostered in every classroom and in every grade;

(viii)   students study American, European, African, and South American history;

(ix)   Direct Instruction is provided in all grades; and

(x)   character development curriculum is provided in all grades.

Wallace Stegner Academy's mission and the key elements described above are strategically incorporated throughout the school's culture and daily operations in a concerted effort to continuously improve students' growth and proficiency.

Goal 1: Increase Acadience Reading Proficiency: Achieve a 5% increase in the percentage of K–3 students

Goal 2: Improve ELA Achievement: Increase the percentage of students scoring proficient or higher on the RISE ELA summative assessment.

Goal 3: Improve Math Achievement: Increase the percentage of students scoring proficient or higher on the RISE Math summative assessment.

Goal 4: Strengthen Instruction Through Professional Development: Instructional staff complete at least 30 hours of high-quality, evidence-based professional development annually.

1. **Executive Summary**

    School Name: Wallace Stegner Academy (Sunset Campus)
    Location: 160 W. 2525 N., Sunset, Utah
    Authorizer: Utah State Charter School Board
    Grant Program: Charter Schools Program (CSP) Grant
    Amount Requested: $2,000,000

    Wallace Stegner Academy ("WSA"), a 2025 National ESEA Distinguished School Award recipient, is applying for $2,000,000 from the Charter School Program ("CSP") grant to support the launch of a new replication campus located in Sunset, Utah. Wallace Stegner Academy currently serves 2,166 students across three campuses in Salt Lake County. On January 16, 2025, the Utah State Charter School Board authorized WSA to open a fourth campus in the city of Sunset, Utah. All four campuses were strategically located in areas that would help us meet our primary objective: *to serve the specific needs of students who are at risk of academic failure*. These students are often economically disadvantaged, language minority, and multicultural students that lack opportunities to take advantage of better public education options.

    Wallace Stegner Academy has cultivated a reputation for setting high expectations for its staff and its students, and WSA students continually rise to meet those expectations. The success of WSA's program is demonstrated by comparing its existing campuses to their surrounding schools. When compared to the closest 10 schools, WSA's Salt Lake campus proficiency rates exceed the average of the surrounding schools' proficiency rates by 21 percentage points in the core subject areas (language arts, mathematics, and science). Likewise, WSA's West Valley campus proficiency rates exceed the average of the surrounding schools' proficiency rates by an average of 22 percentage points in the core subject areas. (These numbers are broken down on subsequent pages.) Wallace Stegner Academy is now seeking CSP grant funds to equip its new replication school with the resources and equipment needed to meet the needs of this community's underserved populations which are at risk of academic failure.

    Wallace Stegner Academy's governing board recognizes that sound financial planning is critical for the startup and implementation phases of a new campus or school. Our leadership team has spent significant effort to identify allowable expenses and to explicitly tie those expenses to project goals. Our entire leadership team is grateful for the opportunity to submit this grant application, and we hope our passion and commitment to improving student outcomes is apparent to the reader.

2. **Educational Model**
   <u>**Project Design**</u>
   a. **Key Components**

   Wallace Stegner Academy ("WSA"), a 2025 National ESEA Distinguished School Award recipient and Charter School of the year in 2020, serves 2,166 students across three campuses in Salt Lake County. Our first campus opened in the fall of 2016 in Salt Lake City and currently serves 684 students in grades K-8. Our second campus opened in the fall of 2021 in West Valley City and currently serves 702 students in grades K-8. In August 2024, we opened our new Kearns campus which currently serves 780 students in grades K-9. Most recently, on January 16, 2025, the Utah State Charter School Board authorized WSA to open a fourth campus in the city of Sunset, Utah. All four campuses were strategically located in areas that would help us meet our primary objective: *to serve the specific needs of students who are at risk of academic failure*. While our primary objective is to serve the specific needs of students who are at risk of academic failure, our secondary objective is to close the achievement gap for as many students as possible and to prepare our students for their future careers as high school students, university students, and beyond. These students are often economically disadvantaged, language minority, and multicultural students that lack opportunities to take advantage of better public education options. Many of these students are years behind their peers academically, which prevents them from accessing curriculum and connecting to an academic school culture in a meaningful way.

   Wallace Stegner Academy provides every student with a rigorous college preparatory education that is specifically designed to help students achieve academic excellence by utilizing rigorous and research-based techniques to improve student learning outcomes. Some of the key elements of our model include: (i) Wallace Stegner Academy specifically targets economically disadvantaged minority English Language Learners; (ii) data-driven instruction modeled after Uncommon Schools; (iii) curriculum developed around measurable goals with formative and summative assessments; (iv) scaffolded instruction, defined as lessons designed around the concept that all learning objectives will be taught in a spiral pattern; (v) ability-based mathematics, reading, and English language arts programs; (vi) reading programs that are phonics-based at first, and later focus on the development of comprehension strategies and metacognition; (vii) academic vocabulary is fostered in every classroom and in every grade; (viii) students study American, European, African, and South American history; (ix) Direct Instruction is provided in all grades; and (x) character development curriculum is provided in all grades.

Wallace Stegner Academy's mission and the key elements described above are strategically incorporated throughout the school's culture and daily operations in a concerted effort to continuously improve students' growth and proficiency. Wallace Stegner Academy's students receive personalized mathematics and reading classes, and students in every grade receive daily science instruction. Every WSA student is also offered daily study hall/tutoring/music after school in an effort to create a culture that prioritizes reading, studying and homework. Inasmuch as parental involvement plays a critical role in the academic success of children, teachers and parents exchange contact information, and teachers hand out business cards with their cell phone numbers to all parents to promote communication and collaboration with families.

At WSA, we set high expectations for our staff and our students, and our students continually rise to meet those expectations. The greatest evidence of our students' capacity to meet and exceed expectations is reflected in their academic performance. A comparison of the proficiency data of each WSA campus to its closest surrounding schools emphasizes the improved learning outcomes at WSA. When compared to the closest 10 schools, WSA's Salt Lake campus proficiency rates exceed the average of the surrounding schools' proficiency rates by 25 percentage points in language arts, 18 percentage points in mathematics, and 21 percentage points in science.[1] Likewise, our West Valley campus proficiency rates exceed the average of the surrounding schools' proficiency rates by 21 percentage points in language arts, 21 percentage points in mathematics, and 23 percentage points in science.[2] After demonstrating our capacity to open three campuses in locations where students were at-risk of academic failure and proficiency rates fell far below district/state averages, WSA will now offer our proven methodology to close the achievement gap that exists in our target area and meet the needs of students that will enroll at our new replication school in Sunset, Utah.

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[1] Schools referenced include the following: Parkview Elem, Franklin Elem, Mountainview Elem, Edison Elem, Glendale Jr High, Riley Elem, Meadowlark Elem, Dual Immersion, Endeavor Hall, Mana Academy. Proficiency data source: Utah State Board of Education, Data Gateway, *Student Proficiency Results*, https://datagateway.schools.utah.gov/Assessment/StudentProficiency/2024/StudentProficiencyPublic

[2] Schools referenced include the following: West Valley Elem, Gearld L Wright Elem, Valley Crest Elem, Armstrong Elem, Whittier Elem, Hunter Jr High, Matheson Jr High, Esperanza, Entheos Academy, Monticello Academy. Proficiency data source: Utah State Board of Education, Data Gateway, *Student Proficiency Results*, https://datagateway.schools.utah.gov/Assessment/StudentProficiency/2024/StudentProficiencyPublic

A review of the academic performance of schools in the target area demonstrates the achievement gap that exists in this community. The charts to the right illustrate the achievement gap that exists between the proficiency rates and MGP of the districts as a whole and the individual schools in our target area. On average, district proficiency rates exceed these individual schools' rates by 10 percentage points in language arts, 12 percentage points in mathematics, and 6 percentage points in science. Similarly, on average, WSA's proficiency rates exceed the target area schools' rates by 15 percentage points in language arts, 16 percentage points in mathematics, and 13 percentage points in science.

After demonstrating our capacity to open three campuses in locations where students were at-risk of academic failure and proficiency rates fell far below district/state averages, WSA will now offer our proven methodology to close the achievement gap that exists in our target area and meet the needs of students that will enroll at our new replication school in Sunset, Utah

b. **Growth Plan**
Wallace Stegner Academy is authorized to enroll 810 students in grades K-8 at its new Sunset campus. While the new school is located in Sunset, our target area for enrollment purposes includes all or portions of Clinton, Clearfield, and Roy. Within 2.5 miles of our Sunset campus, there are
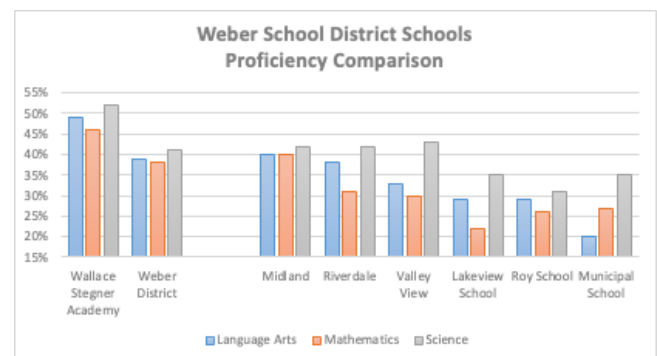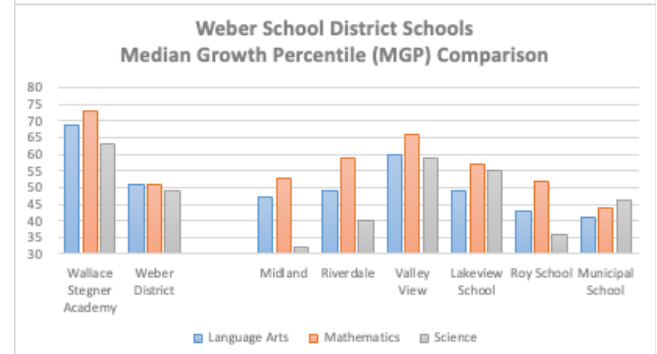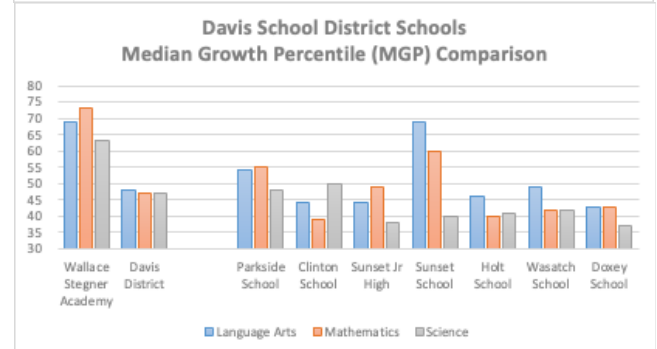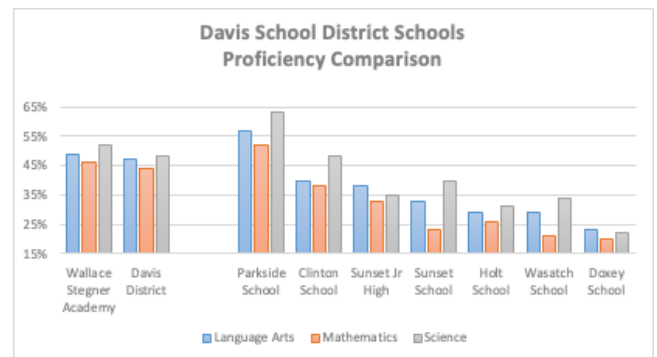
two junior high schools and 12 elementary schools.[3] According to the USBE's 2024 fall enrollment report, approximately 5,332 students attend K-9 district schools located within our target area.[4] Based on this report, 35% of students residing in the target area are racial/ethnic minorities, 45% are economically disadvantaged, and 8% are English Language Learners.

The communities that surround our target area can be described as "low growth" areas that contain minimal new housing projects that are planned, under construction, or recently completed.[5] According to US Census estimates from the period of April 1, 2020 to July 1, 2023, population in the cities of Sunset, Clinton, Roy and Clearfield experienced a 2% increase.[6] 93% of this population growth occurred in Clearfield, and the cities of Sunset and Roy reported slight decreases in total population during the same time period. In short, we are not targeting a community that is experiencing overcrowded classrooms due to increased housing developments or population growth. Our target area and targeted demographic profile consists of a student population that has above average percentages of students that are economically disadvantaged, language minority, and/or multicultural students that attend schools that struggle to keep pace with state and district outcomes.

When WSA presented the New Satellite School Application for its Sunset campus, the Utah State Charter School Board ("SCSB") voted unanimously to approve WSA's request to open the new school. Part of the discussion surrounding approval of this replication was WSA's ability to open the replication school as early as the fall of 2025. Inasmuch as the educational landscape and demographic/student performance profile of Sunset and its surrounding communities is aligned with WSA's express purpose to seek and serve the needs of at-risk students, the SCSB discussed the benefits of expediting the opening process to address the immediate needs of students in this community. The SCSB again voted unanimously to endorse a request to allow WSA to open its replication school and begin serving students in the fall of 2025. Subsequently, the Utah State Board of Education agreed with the SCSB and authorized WSA to begin operations in the fall of 2025.

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[3] Target area schools include Clinton Elementary, Doxey Elementary, Holt Elementary, Parkside Elementary, Sunset Jr. High, Sunset Elementary, Wasatch Elementary, Lakeview Elementary, Municipal Elementary, Roy Elementary, Midland Elementary, Riverdale Elementary, and Valley View Elementary.
[4] Utah State Board of Education, *Fall Enrollment by Grade Level and Demographics, October 1, 2024, School Year 2024-2025.*
[5] Kem C. Gardner Policy Institute, August 26, 2022, *Davis County Demographic Insights, https://utahlanduse.org/wp-content/uploads/2022/08/20220826_Davisv2.pdf.*
[6] See, United States Census Bureau, https://www.census.gov/quickfacts/

This abbreviated timeline to open a new replication school presents challenges, but WSA's governing board and leadership team have expended considerable effort to identify and plan for these challenges. One of these challenges is an abbreviated marketing season for year one enrollment. Recognizing the potential for slightly lower year one enrollment, the governing board and administrative leadership team worked together to establish a marketing plan as well as a budget that allows for enrollment growth in future years. In short, WSA projects a minimum year one enrollment of 275 students. As our reputation grows within the community, we anticipate our enrollment will grow to our authorized capacity by year three of operations as it has with our other campuses.

Families come to WSA because we have a demonstrable and successful record for providing: direct instruction; data-driven instruction; ability-based Math, Reading, and Language Arts classes for all students; character development curriculum; and explicit Academic English Language classes for English Language Learners. No schools in the target area offer this wide range of methods designed specifically around the needs of the students. One of the greatest indicators of our ability to effectively market to a broad cross-section of families and prospective students in a new area is our experience planning and opening our other three campuses. Since WSA's inception, notifying members of a new community about the enrollment opportunities available at WSA has been a high priority for our governing board, and our enrollment goals have been tied directly to our executive directors' yearly evaluations.

c. **Professional Development**
Of all the factors that contribute to improved student learning, effective teachers provide the greatest impact on the success of a child's academic education, and WSA works relentlessly to ensure its students have the best-trained teachers. Wallace Stegner Academy teachers receive dozens of in-class training sessions and observations each year (compared to just one or two at a traditional school). These in-class training sessions give the teachers an authentic environment to improve their instruction with their students. These sessions are done by the instructional leaders of our schools, the principal. The principals give teachers incremental bite-sized feedback as part of their feedback. Our teaching staff also receives over two weeks of in-service training days per year compared to 2-4 days at a traditional school. These trainings are not simply sitting in a conference room listening to a presenter. They involve watching videos of master teachers, making plans to emulate

their skills, and practicing them with their peers. After this practice, their peers give them feedback on improvement and they incorporate that feedback into a final round of practice. Teachers then make goals of how to implement these skills into their everyday craft.

Project Goals

a. **SMART Goals** To guide instructional priorities and ensure accountability to student success at the Sunset campus, we have identified the following SMART goals aligned with the project's budget, planned activities, and the educational needs of our students:

- **Increase Acadience Reading Proficiency**: Achieve a 5% increase in the percentage of K–3 students scoring "on or above benchmark" from the Beginning-of-Year (BOY) to the End-of-Year (EOY) 2025–2026 Acadience Reading assessments.

- **Improve ELA Achievement**: Increase the percentage of students scoring proficient or higher on the RISE ELA summative assessment by 3% from 2024–2025 to 2025–2026.

- **Improve Math Achievement**: Increase the percentage of students scoring proficient or higher on the RISE Math summative assessment by 3% from 2024–2025 to 2025–2026.

- **Strengthen Instruction Through Professional Development**: Ensure 100% of instructional staff complete at least 30 hours of high-quality, evidence-based professional development annually, focusing on data-driven instruction and best practices in ELA and Math.

b. **Goal Tracking** .To ensure these goals are met with fidelity and impact, the Sunset campus will implement a multi-tiered system for goal tracking that combines rigorous data collection, regular analysis, and structured accountability processes.

Acadience Reading assessments will be administered at the BOY, MOY, and EOY to provide frequent and actionable data on student literacy development. Teachers and instructional leaders will use these results to adapt small-group instruction, target interventions, and inform curriculum pacing. Similarly, the RISE ELA and Math assessments will serve as the key summative measures for annual academic progress. Internal interim benchmarks and classroom-

based assessments will provide timely data to assess whether students are on track to meet proficiency targets in both subjects.

Academic data will be reviewed regularly through monthly data team meetings led by school leadership to analyze trends across classrooms and grade levels. These reviews will inform adjustments to instructional strategies, curriculum supports, and intervention plans as needed.

Progress toward goals will be reported to key stakeholders on a regular schedule. Instructional teams will engage in quarterly reviews of student achievement data, and biannual reports summarizing school-wide progress will be presented to the school board and CSP grant administrators. These progress checks will guide responsive planning and mid-year course corrections if needed.

Finally, professional development will be aligned with identified areas of need and tracked through a staff PD log. Each session will be evaluated for relevance and effectiveness, and instructional coaching cycles will ensure classroom application. These systems work together to create a continuous improvement loop where data informs instruction, professional growth, and ultimately, student success.

Plan for Serving Student Needs
a. Strategies to Improve Student Outcomes

At Wallace Stegner Academy, our mission, vision and focus centers on improving student outcomes, particularly in areas where underserved populations are at risk for academic failure. Our team's concerted effort to improve learning outcomes has led to a culture of high expectations for both students and staff. To accomplish this, WSA utilizes many approaches and strategies that support our goals. Wallace Stegner Academy teachers use direct instruction and continuously analyze assessment data to drive instructional decisions. All WSA students receive personalized and ability-based math, reading, and science classes every day. Our English Language Learners also receive explicit Academic English Language classes. Every WSA student is also offered daily study hall and music classes after school in an effort to create a culture that prioritizes reading and studying. Because parental involvement is critical to student achievement, teachers and parents exchange contact information, and teachers hand out business cards with their cell phone numbers to all parents to promote communication and collaboration with families. Wallace Stegner Academy's capacity to improve student outcomes is further supported by our professional and well-trained classroom

educators. Our teachers receive over 100 in-class training sessions and evaluations each year, and they receive over two weeks of in-service training days per year. In addition to regular class time, the majority of WSA's students attend our after-school tutoring program where students are provided an extra hour to review the day's homework and receive additional support.

Wallace Stegner Academy's comprehensive program of instruction, as described above, will be provided to all students who attend our new Sunset Campus replication school, and we expect the same results we have seen at our other three campuses. Specifically, we anticipate new families will embrace our school, and we expect significant growth in our students' academic performance.

b. **Meeting the Needs of Underserved Populations**
Wallace Stegner Academy was specifically established to meet the needs of underserved populations, including students with disabilities, economically disadvantaged students, language minority students, multicultural students and English Language Learners. At WSA, we ensure underserved populations receive evidence-based instruction tailored to their individual needs as required by law. To meet our obligation to provide this evidence-based instruction, WSA uses a Multi-Tiered Systems of Support approach. All students at WSA have equal access to quality Tier I instruction. This core Tier I instruction aligns with our academic focus and commitment to effective teaching strategies. All students are taught using and have access to evidence-based curriculum and materials.

Wallace Stegner Academy's approach to providing evidence-based instruction ensures: (i) that learning goals will be performance-based which will contribute to increased student learning by focusing instruction on targeted outcomes; (ii) that learning goals will be based on high academic standards and measured regularly; (iii) that instruction will be task-oriented and will emphasize work completion; (iv) that accelerated curricular opportunities will be identified and made available to students; and (v) that data informs our decision-making and assists our efforts to diagnose learning needs and degrees of mastery.

Students at WSA that are identified as part of special populations and other students at risk of academic failure also participate in Tier 2 instruction as part of an RTI program. Tier 2 instruction includes research-based intervention that addresses the unique needs of students in special populations. These targeted interventions are provided using evidence-based instruction and strategies that

have demonstrated effectiveness in improving academic outcomes for students with disabilities, students who are English Language Learners, and students who are affected by poverty. These Tier 2 interventions are based on assessment data for each individual student and can be flexible based on specific student needs and growth.

Students identified as members of special populations also receive Tier 3 instruction. This instruction includes Special Education instruction according to each student's Individualized Education Program (IEP), and targeted instruction for English Language Learners identified by WIDA, and it is provided by our teaching staff which is specifically trained and licensed in those specialized areas of instruction.

For students with disabilities (IEPs and 504s), an individual plan is created with a team, including parents or caregivers, to outline the specific needs of each student and how WSA staff will use evidence-based interventions, accommodations, and instructional strategies to support each student's growth and learning.

Specialized language support is provided for students identified as English Language Learners. Wallace Stegner Academy uses evidence-based strategies such as, sheltered instruction, language support programs, and specialized instruction by a highly qualified teacher who provides specific language instruction to those students.

All tiers of instruction conduct ongoing assessments and progress monitoring, including state mandated assessments, to track the development of students with disabilities, English Language Learners, and students affected by poverty. Data-driven decision-making about instruction and interventions are an integral part of our focused effort to adjust instruction and ensure each student's academic growth.

c. **Equitable & Inclusive Practices**
All public schools, including WSA, are subject to state and federal laws that prohibit discrimination and ensure equal access to educational opportunities. These laws include Title VI of the Civil Rights Act of 1964, Title IX, Section 504 of the Rehabilitation Act, and Title II of the ADA. These anti discrimination laws are incorporated into WSA's governing policies and administrative procedures which include, but are not limited to, WSA's Language Access Policy, Civil Rights Policy, Parent and Family Engagement Policy, Special Education

Instruction Policy, Title I Comparability of Services Policy, and our Religion and Education Policy.

Notwithstanding the laws and policies that prohibit discrimination, we believe our commitment to equitable and inclusive practices is evidenced by the diversity of our student body. For example, 60% of WSA's students are economically disadvantaged, and 78% of WSA's student body is non-white, multiple race or minority. At WSA, it is our express purpose to disrupt inequitable customs/practices/beliefs/discrimination and provide underserved populations with a substantive public education choice for their children. We offer a diverse and inclusive curriculum, and that diversity is also reflected by our administration and in the makeup of our governing board. At WSA, we provide a robust English language learner program to help students who are learning English, and our educators are trained in best practices for teaching ELL students. Wallace Stegner Academy also provides comprehensive special education services and accommodations to students with disabilities and ensures that the IEP process is followed to meet the unique needs of each student with a disability.

It goes without saying that all parents want a great education for their children regardless of their racial, economic, or any other status. Parents want their children to be treated as capable individuals, and they want their children to have the greatest chance to succeed in life. Families come to WSA because this is precisely what we provide to our students.

Family & Community Involvement
  a. **Family & Community Engagement**
  Wallace Stegner Academy views families and the broader community as critical partners in achieving our mission of providing a structured, high-expectations educational environment where every student thrives. We recognize that a school cannot function in isolation and that authentic, consistent engagement is essential for both student success and long-term sustainability. To support this vision, we are establishing multiple pathways for engagement, ranging from regular family-teacher conferences and dynamic school events to a robust volunteer program that empowers parents and guardians to participate actively in the life of the school.

Communication is a cornerstone of our engagement strategy. Families will receive timely updates through Bloomz, our multilingual communication app, as well as through weekly newsletters. We will also maintain an open-door policy, encouraging families to share feedback and concerns. In addition to

school-based efforts, Wallace Stegner Academy is cultivating formal partnerships with local libraries, mental health providers, and after-school enrichment organizations to provide students and families with the wraparound services they need to thrive. Through these efforts, we are building a school culture in which families feel welcomed, respected, and involved, laying the groundwork for Wallace Stegner Academy to become a trusted and vital institution within the community.

b. **Opportunities for Family/Community Engagement**
Ensuring meaningful opportunities for families—particularly those from historically underserved populations—to contribute to decision-making is central to our equity-focused approach. We are proactively conducting multilingual surveys and focus groups to understand the needs and perspectives of diverse families. Translation and interpretation services will be available for all major meetings and communications, helping eliminate language as a barrier to participation. To further strengthen the connection between home and school, we have been working with family liaisons from within the community who can serve as trusted bridges for linguistically and culturally diverse populations.

c. **Pre-Operational Family Engagement**
Even before opening our doors, Wallace Stegner Academy has prioritized meaningful, pre-operational engagement with families to build trust and community buy-in. Our outreach began with a series of Community Listening Sessions in partnership with neighborhood groups, where we gathered perspectives on local educational needs and aspirations. These sessions— held on April 2nd, April 23rd, May 15th, and May 29th 2025—created space for families to share their hopes and concerns and to hear the vision of the school firsthand. Founding Family Information Sessions were hosted at local libraries, and community centers, providing parents an opportunity to learn about our mission and give feedback on the school's proposed academic and cultural model. We also distributed bilingual surveys focused on key topics such as transportation, extracurricular interests, and school culture preferences. As part of our outreach, families were invited to preview school designs, and meet the leadership team, further strengthening relationships and establishing a sense of ownership in the school's development. These pre-opening efforts have helped us generate excitement, identify access challenges, and build a foundation of trust that will carry into our first year and beyond.

d. **Stakeholder Feedback**

Stakeholder feedback has played a crucial role in informing the development and priorities of Wallace Stegner Academy. Across all our engagement events, parents have repeatedly emphasized the importance of a highly structured academic environment. In response, we've reinforced our commitment to a rigorous curriculum supported by clear routines and consistent school culture systems. Another consistent theme was the need for bilingual communication, particularly for Spanish-speaking families. As a result, we have committed to making all key documents and communications available in English and Spanish, and our communication platform Bloomz includes translation capabilities to support real-time, multilingual interactions. We also intend to hire office staff that are bilingual to facilitate this communication. Notably, we heard resounding feedback about the overuse of technology in classrooms. Parents shared concerns that students were spending too much time on screens, with minimal human interaction. Taking this feedback seriously, we have committed to limiting screen time to no more than 40 minutes per day across all grade levels. We view this shift not only as a reflection of community values but also as an important step in fostering authentic, face-to-face learning.

e. **School Outreach**

Wallace Stegner Academy employs a variety of school outreach strategies designed to inform and attract families with diverse backgrounds regardless of their protected class or status. The majority of our marketing strategies focuses on attracting low-income, multicultural students, English Language Learners, and any other group of students that are at risk of academic failure.

Each Monday, WSA's administration hosts campus tours for families that are interested in learning more about our program. These campus tours include a presentation on the merits and functions of charter schools and a detailed explanation of the school's mission and philosophy. Our administration also hosts regular open houses to provide interested parents and community members the opportunity to ask questions about our new school. Due to the large percentage of Spanish speaking residents in our target area, all open houses are presented in both English and Spanish. These open houses are advertised through our online marketing and print campaign, as well as mass mailers and building signage. Wallace Stegner Academy's outreach materials provide a link to our comprehensive website which educates the public about the functions of charter schools in general, the curriculum and methods of our school, and information about how to enroll. Our website also includes a

detailed frequently asked questions page, contact information, school policies and procedures, school performance information, and all information required by Utah rule and/or law. Wallace Stegner Academy's executive directors also believe in the importance of making meaningful connections with local churches and community groups, and our team sets up informational booths at local events and grocery stores and takes advantage of other community-based marketing opportunities.

Community Support & Demand
a. Projected School Enrollment

Wallace Stegner Academy's new campus will be located within the city of Sunset, Utah, but the enrollment target area also includes the cities of Clinton, Clearfield, and Roy. This area falls within the boundaries of both Davis School District and Weber School District. For purposes of this analysis, we have focused our attention on the student population and schools that exist within 2.5 miles of our location at 160 W. 2525 N., Sunset, Utah. This review consists of two junior high schools and 12 elementary schools that fall within this 2.5 mile radius.[7] According to the USBE's 2024 fall enrollment report, approximately 5,332 students attend K-9 district schools located within our target area.[8] Based on this report, 35% of students residing in the target area are racial/ethnic minorities, 45% are economically disadvantaged, and 8% are English Language Learners. These student demographics provide context to a discussion of population growth and development in the area.

Our target area can be described as an area of low growth that contains minimal new housing projects that are planned, under construction, or recently completed. According to US Census estimates from the period of April 1, 2020 to July 1, 2023, population in the cities of Sunset, Clinton, Roy and Clearfield experienced a 2% increase.[9] 93% of this population growth occurred in Clearfield, and the cities of Sunset and Roy reported slight decreases in total population during the same timeframe. In short, we are not targeting a community that is experiencing overcrowded classrooms due to increased housing developments or population growth. Our target area and targeted demographic profile consists of a student population that has above

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[7] Target area schools include Clinton Elementary, Doxey Elementary, Holt Elementary, Parkside Elementary, Sunset Jr. High, Sunset Elementary, Wasatch Elementary, Lakeview Elementary, Municipal Elementary, Roy Elementary, Midland Elementary, Riverdale Elementary, and Valley View Elementary.

[8] See, *Fall Enrollment by Grade Level and Demographics, October 1, 2024 School Year 2024-2025,* *https://www.schools.utah.gov/datastatistics/reports*

[9] See, United States Census Bureau, https://www.census.gov/quickfacts/

average percentages of students that are economically disadvantaged, language minority, and/or multicultural students that attend schools which struggle to keep pace with state and district outcomes.

The target area for WSA's new replication school in Sunset reflects a student demographic profile that resembles WSA's current enrollment which can be characterized by higher-than-average percentages of economically disadvantaged students, ethnic/racial minority students, and ELL students. Moreover, the schools that fall within the target area consistently fail to meet state and district averages. For example, average district proficiency rates exceed our target area schools' rates by 10 percentage points in language arts, 12 percentage points in mathematics, and 6 percentage points in science. Similarly, on average, WSA's proficiency rates exceed the target area schools' rates by 15 percentage points in language arts, 16 percentage points in mathematics, and 13 percentage points in science.

After successfully opening three campuses in underprivileged areas where student proficiency fell far below district and state averages, we believe we have a proven methodology to meet our enrollment goals, and more importantly, to close the achievement gap that exists in our target area and meet the needs of students that enroll at our new Sunset campus.

b. **Projected Student Demographics**
   As noted above, 5,332 students attend K-9 district schools located within our target area. Based on the Utah State Board of Education's *Fall Enrollment by Grade Level and Demographics, October 1, 2024 School Year 2024-2025* report, 35% of students residing in the target area are racial/ethnic minorities, 45% are economically disadvantaged, and 8% are English Language Learners. Based on our experience, WSA enrolls 15%-25% more racial/ethnic minorities than the campus's district of residence. For example, Salt Lake School District's fall enrollment consisted of 61% racial/ethnic minority students, while WSA's West Valley City campus reported a fall enrollment of 76% racial/ethnic minority. Likewise, when comparing enrollment rates of economically disadvantaged students, Granite School District's fall enrollment consisted of 42% economically disadvantaged students, while WSA's Salt Lake City campus reported a fall enrollment rate of 62% economically disadvantaged students. Based on our historical trends and the target area's existing demographics, we project that enrollment at our new Sunset campus will consist of 50%-55% racial/ethnic minority, 55%-60% economically disadvantaged students, and ~10% English Language Learners.

c. **Supporting Local Needs**

At each of our campuses, WSA recognizes the importance of reflecting and supporting the needs of local students and families by leveraging existing community assets and integrating comprehensive community input. This involves engaging with parents, local organizations, and neighborhood leaders to understand educational priorities, cultural values, and the challenges faced by the community. By offering programs that address language diversity, providing after-school resources, and engaging parents in their student's educational experience, WSA creates a hub of support for families. Specific examples of these programs include WSA's explicit Academic English Language classes, daily after-school tutoring, after-school study hall/library time, and WSA's parent compact.

Utilizing school district or community assets also enriches student learning and strengthens ties between WSA and its surrounding communities. Recently, the Davis School District announced the closing of one of its oldest school buildings, the former Fremont Elementary school. Wallace Stegner Academy recognized the benefit of refurbishing the school and bringing new life to a community that has seen little to no revitalization efforts. The school's physical location also plays a critical role in ensuring accessibility for the targeted population. As noted above, WSA's Sunset campus will be located within a former district elementary school which places our program directly within or near these underserved neighborhoods. By housing our program in a former district school, WSA minimizes transportation barriers and ensures students can attend without undue hardship. Proximity to public transportation, housing developments, and key community resources in the near vicinity also allows families to more easily engage with the school, attend events, and access support services. Housing our program in a retired district school facility reflects our team's thoughtful approach to equity and inclusion, ensuring that WSA's replication campus is both physically and socially embedded within the community we seek to serve.

d. **Ensuring Diversity & Equality**

To ensure our new replication school does not hinder desegregation efforts in the community, our first step is to ensure WSA has inclusive admissions and enrollment policies and procedures. In accordance with WSA policy, no student is provided priority notice or guaranteed admission to the school. Wallace Stegner Academy does not make enrollment decisions or give preference to any student on any basis prohibited by applicable law, including

federal civil rights laws and IDEA 2004. Each year, WSA begins accepting new applications in approximately December for enrollment in the following school year. In the event that more students apply during an enrollment period than there are available spots in any given grade, students will be selected by a computer-generated random-draw lottery system in accordance with state guidelines. The first lottery is held in January. Additional lotteries are held, as needed, until the enrollment capacities are reached. The open enrollment period will remain open and WSA will continue to accept applications until all available spots have been filled. Wallace Stegner Academy's lottery-based admissions system does not favor any racial, ethnic, or socioeconomic group. This system is designed to preclude the inadvertent exclusion of students from underrepresented backgrounds.

In addition to our lottery system, WSA has a longstanding reputation for its ability to actively recruit students from a variety of neighborhoods and demographic groups, including underrepresented populations. Wallace Stegner Academy's outreach materials are made available in multiple languages and distributed through diverse channels, such as community centers, faith-based organizations, and public housing authorities.

The location of our replication school is another factor that promotes equality. Inasmuch as WSA's replication school will be located in a former neighborhood district school, the location will be both convenient and accessible to the community's diverse population and will not concentrate students from a single racial or socioeconomic group. This can help promote integration rather than contributing to segregation.

e. **Promoting Community Desegregation Efforts & Equitable Educational Opportunities**
Wallace Stegner Academy has demonstrated its commitment and capacity to promote community desegregation efforts and equitable educational opportunities by actively designing policies and programs that foster inclusivity, diversity, and equal access for all students. This begins with our founding commitment to serve a demographically diverse student body through equitable enrollment practices and targeted outreach to underserved populations. Additionally, WSA's curriculum and school culture reflect the diversity of the community, integrating culturally responsive teaching and multilingual support to create an inclusive learning environment.

To ensure all legal requirements are met, WSA is committed to complying with federal and state civil rights laws, and any relevant local desegregation orders or court mandates. This includes transparent reporting on student demographic and adherence to fair discipline practices.

Transportation Plan

a. Safe, Efficient & Cost-Effective Transportation

Unlike school districts in the state of Utah, public charter schools do not receive funding for student transportation. Accordingly, Utah charter schools rarely provide for student transportation. However, with the assistance of this CSP Grant, WSA is seeking funds to purchase school buses in support of our desire to provide reliable, safe, and equitable transportation that ensures all students, including those with special needs or limited transportation options, have full access to the educational opportunities offered by WSA. If WSA is awarded grant funds to purchase school buses, it will offer daily bus service for students. Routes and pickup/drop off locations will be planned using student address data to ensure that high-need and underserved communities are not excluded. Prioritization will be given to areas with limited access to public transit. All buses will meet state safety standards and be equipped with GPS tracking, seat belts, and two-way communication systems. For older students, WSA will collaborate with local transit authorities to provide subsidized or free passes. Routes will be reviewed to ensure safety and convenience. Wallace Stegner Academy's executive directors will oversee compliance, route planning, safety audits, and parent feedback. Annual reviews will assess efficiency, equity, and satisfaction, and adjustments will be made as needed.

b. Target Location: Access & Neighborhood Demographics

As noted above, WSA's Sunset campus enables our team to situate our program within or near underserved neighborhoods. By housing our program in a former district school, WSA minimizes transportation barriers and ensures students can attend without undue hardship. Proximity to public transportation, housing developments, and key community resources in the near vicinity also allows families to more easily engage with the school, attend events, and access support services.

For purposes of discussing school accessibility and transportation, the National Institutes of Health generally defines "walking distance" as ~1 mile for youth and adolescents.[10] This number increases/decreases depending on the

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[10] Chillón P, Panter J, Corder K, Jones AP, Van Sluijs EM. *A longitudinal study of the distance that young people walk to school*. Health Place. 2015.

age of the individual, but for our purposes, we have chosen one mile as the scope of our analysis of the neighborhood demographics surrounding our replication school campus.

There are 3,773 students that attend the five district elementary schools and two junior high schools that fall within one mile of our replication school campus.[11] Of the 3,773 K-9 students, 31% are racial/ethnic minorities, 38% are economically disadvantaged students, and 6% are English Language Learners. When looking at the student population within our campus's immediate vicinity (+/- .5 miles), schools report enrollment of 37% racial/ethnic minorities, 42% economically disadvantaged students, and 9% English Language Learners. Comparing the demographics of our immediate vicinity to the demographics that exist within one mile of the school demonstrates that our replication school's location is perfectly situated to provide the most accessibility to the highest density of minority and economically disadvantaged students in our general target area.

3. **Lottery Process**
   a. **Lottery Process, Enrollment Notification, Lottery Timeline, Lottery Preferences/Exemptions & Registration Process**
   Wallace Stegner Academy believes that it is important to conduct its lottery and enrollment procedures in an equitable, inclusive, consistent, and legal manner. Wallace Stegner Academy adheres to all applicable laws in connection with its lottery and the enrollment of students, including requirements to notify prospective students and parents. Wallace Stegner Academy employs a variety of school outreach strategies designed to inform and attract families with diverse backgrounds regardless of their protected class or status. These strategies include weekly school tours, open houses, direct mailers, collaboration with churches and community groups, and stationing outreach booths at local events and grocery stores. Our outreach plan focuses on attracting low-income, multicultural students, English Language Learners, and any other group of students that are at risk of academic failure.

   Students apply to attend WSA online or by completing a paper application provided by the school to be placed into an electronic database. The applications of students that are not accepted are purged prior to each new open enrollment period rather than carried over to the following year, so new

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[11] Schools include Roy Junior High, Municipal Elementary, Parkside Elementary, Sunset Elementary, Clinton Elementary, Sunset Junior High, Doxey Elementary.

applications must be submitted each year for students seeking admission to any WSA campus. In the event that more students apply during an enrollment period than there are available spots in any given grade, students will be selected by a computer-generated random-draw lottery in accordance with state guidelines.

Wallace Stegner Academy begins accepting applications in December of the prior year. The first lottery is held in January of each year. Additional lotteries may be held as needed until the desired enrollment numbers are reached. The open enrollment period will remain open and WSA will continue to accept applications until all available spots have been filled. Wallace Stegner Academy may continue to enroll students from the lottery throughout the school year to fill spots that open when students withdraw. In accordance with state law, WSA publicizes on its website the dates of enrollment periods so all interested parents have an opportunity to submit an application for their student(s).

Wallace Stegner Academy offers preferential enrollment to certain categories of students as permitted under applicable law. Preferential enrollment will be given first to the children of any "founding members." Founding Members are those individuals that have made a significant contribution to the establishment of the charter as determined by the board of directors. Founder status will not be conferred based on donations made to the school. Preferential enrollment will next be given next to siblings of students that are already enrolled at WSA. Preferential enrollment will be given next to children of full-time WSA employees (regularly working 30 hours or more per week). Students enrolled under the first and third preferential categories cannot exceed 5% of the WSA's total enrollment in any year; therefore, founders may only be allowed to enroll one student using the founder preference. No students will be given priority notice or guaranteed admission to WSA. Wallace Stegner Academy will not make enrollment decisions or give preference to any student on any basis prohibited by applicable law, including federal civil rights laws and IDEA 2004. If a student is accepted during open enrollment or through the lottery, WSA sends the family a registration packet that contains all necessary and required steps and documentation to become a student at WSA.

4. **Governance, Autonomy & Project Administration**
   a. **Board Member Information**
      Wallace Stegner Academy's governing board recognizes that sound governance and administration are critical for the success of the replication

school. From a governance standpoint, good leadership requires a commitment to WSA's mission, vision and methodologies. Wallace Stegner Academy's governing board has a longstanding history of effective governance and support for the school's executive leadership team. Four of the five members of the governing board served on the board during the school's original planning, start-up and initial years of operations.

The governing board generally meets 8-10 times per year. Our team places a high priority on these meetings and works to utilize each other's strengths in a collective effort to make effective and informed decisions on behalf of the school. Each year, the governing board deliberates on the goals and measures that will be used to evaluate the school's executive directors. Wallace Stegner Academy's executive directors then report on progress towards these goals in their board reports throughout the year. The governing board also utilizes its meetings to review, amend or adopt policies that are required by law or best practice to ensure WSA remains in compliance with law and USBE rules.

Wallace Stegner Academy's governing board is comprised of the following individuals:

Sarah Vaughan, PhD, Board President
svaughan@wsacharter.org
Dr. Sarah Vaughan has been involved with Wallace Stegner Academy from the application stage. Ms. Vaughan currently works as an agricultural consultant with local and international clients and has previously worked for agricultural research companies as a scientist and manager. Ms. Vaughan is experienced in project management and working with teams. Her professional background has given her valuable experience to assist the school in her role as board President.

Dr. Vaughan is passionate about education. She completed her PhD in agricultural science at the University of Queensland in Australia where she also worked as a practical tutor of a third-year university subject and worked as an AusAid tutor for postgraduate international students who required additional assistance to complete their written assignments. Ms. Vaughan's experience as a tutor and extensive education have given her insight into education systems, curriculum, and providing educational support for students that need further assistance. Ms. Vaughan is committed to improving the

availability of high-quality education in Utah and is a committed member of the governing board.

Antonio Furano, MBA, Board Financial Coordinator
afurano@wsacharter.org
Antonio Furano is a data analyst with Nu Skin Enterprises and serves as the governing board's Financial Coordinator. Mr. Furano's 20-year career has been built around analytics and data science in the consumer packaged goods and MLM industries. He Graduated with his MBA from the University of Utah in 2010. Mr. Furano believes that critical thinking and the savvy consumption of data and media are key characteristics of a highly functional citizenry. He feels education is one of the most efficient ways to help build these skills in the members of his community.

Mr. Furano also knows that education empowers our most vulnerable populations. To that end, Mr. Furano has served for nine years on the Board of the English Skills Learning Center, which provides free ESL classes to immigrants and refugees. As the son of a school teacher, Mr. Furano was raised with an appreciation for the challenges educators face, and he values the opportunity to support and advocate for underserved populations in our community.

Jeremy Schow, Board Secretary
jschow@wsacharter.org
Jeremy Schol is a seasoned healthcare leader with over 20 years of experience driving innovation, education and strategic growth in the industry. Mr. Schow is the Board Secretary of WSA, and he currently serves as the Chief Sales Officer at AAPC, where he leads national sales strategy and client success efforts, helping to advance healthcare through education, certification, and technology-driven solutions.

Mr. Schow holds several degrees from the University of Utah, with a primary focus in Behavioral Science and Health. His academic foundation reflects his deep curiosity about why people do what they do, a passion that has guided both his professional path and his commitment to improving systems that support human potential. Mr. Schow also holds a minor in business which compliments his understanding of human behavior with practical expertise in organizational leadership.

Reed Farnsworth, MA, Board Member
rfarnsworth@wsacharter.org
Reed Farnsworth is an accomplished executive and founding board member of Wallace Stegner Academy. Mr. Farnsworth brings over 15 years of leadership experience spanning education, consumer finance and technology industries. Mr. Farnsworth has served as President of Blue Raven Solar and Co-President and COO of Acima Credit, where he helped scale operations, lead strategic initiatives, and execute a $1.65B acquisition.

A serial entrepreneur, Mr. Farnsworth co-founded multiple startups including Surf Air and Beacon Air, raising capital, building teams, and launching innovative service models. His public sector experience includes working as a financial analyst at the Federal Reserve during the 2008 financial crisis. Deeply committed to service and education, Mr. Farnsworth co-founded the nonprofit Singular Humanitarian Experience and has led development expeditions to Guatemala, Nepal and Kenya. He holds degrees from Brigham Young University (BS), John Hopkins (MA in Applied Economics), and is completing his MBA at the Wharton School of Business.

Frank Magaña, Board Member
fmagana@wsacharter.org
Frank Magaña is committed to supporting education because of the empowerment and opportunities it brings to individual's lives. Mr. Magaña is a member of the governing board and currently works on the community reinvestment team at Ally Bank where he is involved in initiatives and investments that help improve and revitalize low-income neighborhoods. Mr. Magaña is particularly involved in investing in the construction and rehabilitation of affordable housing. Prior to Ally Bank, he worked at UBS Bank USA where he managed the bank's charitable giving.

Prior to banking, Mr. Magaña worked in the nonprofit sector as Director of Operations at Latinos in Action, a nonprofit organization that focuses on helping primary and secondary school students graduate from high school and enroll in higher education. In that capacity, he oversaw business development, program expansion and implementation, strategic planning, and community relations. Mr. Magaña received his B.A. in History and a Master of Public Administration (MPA) from Brigham Young University.

b. **Role of Business Services Provider**

Wallace Stegner Academy has maintained a longstanding partnership with Academica West, a Utah-based provider of charter school business services. Currently, WSA contracts with Academica West for a comprehensive range of services, including budget preparation, financial reporting and forecasting, accounting, tax filings, audit support, purchasing, policy development, administrator and SIS support, HR, CACTUS reporting, recordkeeping, board clerk services, enrollment and registration assistance, payroll, employment notifications, facility support, and bookkeeping. The governing board evaluates Academica West's performance based on these contracted services.

The board acknowledges that various models exist for managing charter school operations. WSA chose Academica West to ensure experienced professionals with charter-specific expertise oversee the school's business functions. This approach is designed to reduce administrative burdens on executive directors, allowing them to focus on academic outcomes. It also mitigates risks tied to concentrating financial knowledge with a single individual.

Before contracting with Academica West, WSA issued a Request for Proposals (RFP) for charter business management services. Academica West submitted a timely and responsive proposal, which was evaluated by a committee for non-cost elements, with cost considerations reviewed separately. The final scores led the governing board to determine that awarding the contract to Academica West was in the school's best interest. The process adhered to all applicable procurement laws and regulations, including RFP specifications, notice requirements, and evaluation documentation.

Academica West operates under the direction of WSA's governing board. The board retains full autonomy over academic programs, staffing, and curriculum, in accordance with the contract. Academica West collaborates with WSA's executive directors to align business operations with the school's academic goals. WSA retains ownership of all intellectual, personal, and real property.

As Utah's first charter school business service provider, Academica West brings specialized expertise in charter school operations. Its strong reputation has grown through years of experience, and it currently serves 23 charter schools with a combined enrollment of over 20,000 students.

c. **Project Manager & Support Team**

> Project Manager: Adam Gerlach, Co-Chief Executive Officer

Mr. Gerlach will serve as the Project Manager and lead administrator responsible for overseeing the implementation of the CSP Grant. Mr. Gerlach brings over 10 years of experience managing state/federal grants, providing fiscal oversight, and monitoring compliance. Mr. Gerlach's primary responsibilities will include: (i) overseeing all aspects of grant execution in alignment with the approved budget and timeline; (ii) ensuring compliance with grant restrictions and requirements; (iii) coordinating between departments, external partners, and UAPCS; (iv) submitting required reports and maintaining documentation for auditing purposes; and (v) leading regular project review meetings to track progress and troubleshoot challenges.

> Support Team Members: Anthony Sudweeks, M.Ed, Co-Chief Executive Officer and Chantel Wixon, MAcc, CPA, CFE.

The support team will monitor adherence to all grant terms, federal regulations, and reporting requirements. The support team members will be charged with: (i) maintaining detailed records and supporting audit readiness; (ii) coordinating compliance training for staff involved in grant activities; (iii) managing the grant budget, including timelines for expenditures, expense tracking, procurement processes, and financial reporting; (iv) ensuring expenditures align with grant-approved activities; (v) ensuring the implementation of educational elements funded by the grant; (vi) tracking student performance metrics and program outcomes related to grant objectives; and (vii) preparing programmatic data for performance reports.

d. **Relationship with Authorizer**

Wallace Stegner Academy maintains a longstanding and mutually respectful relationship with its authorizer, the Utah State Charter School Board. In accordance with Utah State Code § 53G-5-101, WSA is made subject to the leadership, supervision, regulation and oversight of the SCSB. Wallace Stegner Academy may request technical assistance from the SCSB in any area, including curriculum matters and financial concerns. However, the SCSB is not responsible for any financial or technical support provided other than the funding and technical assistance expressly required by law, nor is the SCSB responsible for the outcome or liability associated with any decision WSA's governing board makes. Neither the SCSB nor the Utah State Board of Education assumes the duty to oversee WSA's operations except as may otherwise be provided by law.

To permit the SCSB, as the Authorizer, to fulfill its legal monitoring and oversight functions, and to ensure that WSA remains in compliance with all applicable laws, regulations, rules, and the terms and conditions of its charter, WSA is obligated to fully support the SCSB's oversight and monitoring responsibilities. This includes responding to all timely requests for reports, audits, formal and informal investigations, formal and informal visits, and inspections of WSA's books and records.

e. **Autonomy & Flexibility; ESEA § 4310(2)**
Wallace Stegner Academy's governing board has the authority, as established in its articles, bylaws and charter agreement to decide matters related to the operation of the school and has final responsibility for its academic and operational performance, and ultimate responsibility remains, at all times, with the governing board.

The Elementary & Secondary Education Act § 4310(2) provides a detailed list of requirements needed to qualify as a "charter school" under the act. Required elements include that the school must operate in pursuit of specific educational goals; the school must provide primary or secondary education; the school must be non-sectarian; the school cannot charge tuition; the school must comply with anti discrimination and civil rights laws, rules, and regulations; the school must be a school of choice; the school must admit students through a random lottery; the school must meet all health and safety requirements; the school must operate in accordance with state law; and the school must have a written agreement with its authorizer. Wallace Stegner Academy acknowledges and affirms that it meets the requirements of a "charter school" as set forth in ESEA § 4310(2).

f. **Charter School Accountability**
The state of Utah's definition of a "charter school" aligns closely with the federal definition provided in ESEA § 4310(2). Both definitions recognize charter schools as public schools that operate under specific legal frameworks, offer educational programs, and maintain certain operational standards. Under Utah law, a charter school is defined as a public school established in accordance with Title 53G, Chapter 5 of the Utah Code. Under Utah law, charter schools are governed by independent boards and operate under a legally binding charter agreement with an authorized entity, such as SCSB. Charter schools in Utah are tuition-free, open to all students, and are held accountable to the public. In terms of flexibility and accountability, Utah law

and ESEA § 4310(2) both require a charter school to have a written agreement with their authorizer which details performance measures and accountability. In addition, Utah's definition and operational structure for charter schools are consistent with the federal criteria set forth in ESEA § 4310(2), which holds the school responsible for both compliance with federal standards and the provision of quality educational choices within the state's public education system.

5. **Financial Management**
   a. **Budget Narrative**
   Wallace Stegner Academy, a 2025 National ESEA Distinguished School Award recipient, is applying for CSP grant funding to support the launch of a new replication campus in Sunset, Utah. With a mission to provide high-quality education to underserved communities, WSA aims to expand into Northern Utah to serve economically disadvantaged youth in areas with limited access to high-performing public-school options. The Sunset campus will build on the successful model currently operating in Salt Lake City, Kearns, and West Valley City.

   As a member of the Charter Growth Fund network, WSA is committed to sustainable growth and strong academic outcomes. This CSP funding is essential to ensuring that the Sunset campus opens with the resources, staff development, and community infrastructure necessary to replicate the success achieved at the existing campuses.

   Planning Phase
   The school has been actively engaged in procurement efforts for several months to ensure a timely and successful launch. Although the $1.7 million planning amount may appear significant, it aligns with 2 CFR 200.458, which permits pre-award costs when properly documented. While we are hopeful for CSP funding, we plan to move forward with purchasing necessary items regardless of grant approval to meet critical operational deadlines. This approach supports the overall project timeline and ensures the school is prepared for opening day.

   CSP funds will be used to equip the new facility with essential furnishings and items. This includes desks, tables, and chairs for students and staff to create a safe and engaging learning environment. A school-wide public address (PA) system will be installed for communication and emergency management, along with a Verkada camera security system, electronic door access controls,

vape sensors, and doorbells to ensure safety and monitoring throughout the building.

To support technology integration and digital access, the school will purchase computers and devices for both students and teachers. These tools are necessary to support differentiated instruction, blended learning models, and administrative efficiency. Administrative equipment such as copy machines and printers will be purchased to support daily school operations. General supplies will be procured to fully stock all classrooms and ensure that every learning space is functional and student-ready.

Recognizing the importance of family and community engagement, CSP funds will also support outreach efforts to build relationships with local families, increase awareness of the new school, and drive student enrollment. To fulfill the Charter School Program's priorities of equitable access, community involvement, and meaningful stakeholder engagement, WSA will implement a comprehensive, community outreach and engagement plan. This plan is designed to inform, empower, and involve families from diverse backgrounds—particularly those who are economically disadvantaged, English learners, or historically underserved.

To help eliminate transportation barriers, WSA will acquire two school buses to support daily transportation needs, field trips, and access for students who may otherwise be unable to attend due to distance or lack of reliable transportation.

Implementation Phase
In the implementation phase, grant funds will support the procurement of curriculum and instructional materials, including the Reading Mastery program and core English Language Arts resources, to ensure strong literacy outcomes. A school library will be established with a broad selection of fiction and non-fiction titles to promote reading engagement and support academic achievement across grade levels. To promote student wellness and physical activity, PE equipment will be purchased to establish a physical education program.

Also, CSP funds will be allocated toward professional development and capacity building. Select teachers and administrators will travel to the Ron Clark Academy for immersive, high-impact training focused on dynamic instructional practices, classroom culture, and leadership. This training is a key

component of WSA's staff development plan and supports long-term instructional excellence.

b. **Accountability for Funds**

Wallace Stegner Academy will ensure full accountability for the use of CSP funds through robust financial oversight and strict adherence to grant requirements. The school's finance team, led by certified professionals, will track all grant expenditures separately in the accounting system and report them accurately and timely in accordance with CSP guidelines. Wallace Stegner Academy maintains strong internal controls, including segregation of duties, documented procurement procedures, and approval workflows to prevent misuse of funds. Regular financial reports will be presented to the governing board for review, and annual independent financial audits will verify the proper use of funds and compliance with federal and state regulations. Additionally, all required grant documentation and reports will be maintained for monitoring and available for review by authorizers, auditors, and the Utah State Board of Education.

c. **Post-Grant Sustainability**

Wallace Stegner Academy has demonstrated consistent academic success across its three existing campuses. The addition of the Sunset campus will allow WSA to extend its impact and serve more students from disadvantaged backgrounds. With the support of CSP funding, WSA will be well-positioned to open a high-quality, fully equipped school in Sunset that reflects the academic rigor, strong culture, and student-centered focus that earned the school national recognition.

Wallace Stegner Academy's Sunset campus will be financially self-sustaining after the CSP grant period through stable state and local per-pupil funding, federal entitlement programs, and shared services across its existing network of schools. The school's conservative budgeting, multi-year financial planning, and proven track record of operating three successful campuses ensure long-term sustainability without reliance on grant funds.

This investment will directly support educational equity and access for students in northern Utah, WSA is confident in its ability to open a successful fourth campus that continues its traditions of excellence and equity.

6. **Competitive Preference Priorities**

Innovative Model
Wallace Stegner Academy offers students an innovative model coupled with a track record of success. Our model/approach consists of a unique combination of curriculum, training, and a relentless commitment to data-driven instructional decisions. Inasmuch as WSA specifically targets populations that are at-risk of academic failure, we are unique among charter schools in the state of Utah. Wallace Stegner Academy strives to meet the unique needs of economically disadvantaged learners by offering data-driven instruction modeled after Uncommon Schools. Our curriculum has been developed around measurable goals with formative and summative assessments, scaffolded instruction, ability-based mathematics, as well as reading programs that are phonics-based at first and later focus on the development of comprehension strategies and metacognition.

Our innovative approach to improving student achievement is found throughout our school's culture and daily operations. Wallace Stegner Academy's students receive personalized mathematics and reading classes, and students in every grade receive daily science instruction. Every WSA student is also offered daily study hall/tutoring/music after school in an effort to create a culture that prioritizes reading, studying and homework.

Charter School/Traditional Public School Collaboration
When charter schools collaborate with traditional school districts, the potential benefits are significant. Both bring unique strengths, and by working together, we can better meet the diverse needs of Utah's students. One key advantage of locating our satellite school within Davis School District is the opportunity to participate in the Davis Education Network.

The Davis Education Network is a collaborative initiative in Davis County, Utah, that connects charter schools and the Davis School District to improve educational outcomes for all students. Established in 2009 under the leadership of former Superintendent Bryan Bowles, the network was designed to foster communication, coordination, and cooperation among the county's educational institutions. Its goal is to ensure every student in Davis County receives a quality education, regardless of whether they attend a charter or district school. This collaboration recognizes the reality that many families have children enrolled in both charter and district schools. By promoting shared goals and communication, the Davis Education Network strengthens the overall educational experience and builds unity across school types.

The network serves as a model for how charter and traditional public schools can work together constructively, rather than as competitors. It demonstrates that when educational institutions unite around common goals, they can elevate the quality of education and serve students more effectively. Open dialogue and mutual respect among schools have led to a more cohesive and supportive educational environment in Davis County.

At Wallace Stegner Academy, we are proud to be part of this collaborative effort and look forward to working with both district and charter leaders. Together, we are committed to enhancing educational opportunities and outcomes for all students in the region.

Charter School Program (CSP) Grant Budget Narrative
Wallace Stegner Academy – Sunset Campus Replication

Wallace Stegner Academy (WSA), a 2025 National ESEA Distinguished School Award recipient, is applying for Charter School Program (CSP) grant funding to support the launch of a new replication campus in Sunset, Utah. With a mission to provide high-quality education to underserved communities, WSA aims to expand into Northern Utah to serve economically disadvantaged youth in areas with limited access to high-performing public-school options. The Sunset campus will build on the successful model currently operating in Salt Lake City, Kearns, and West Valley City.

As a member of the Charter Growth Fund network, WSA is committed to sustainable growth and strong academic outcomes. This CSP funding is essential to ensuring that the Sunset campus opens with the resources, staff development, and community infrastructure necessary to replicate the success achieved at the existing campuses.

Planning Phase

The school has been actively engaged in procurement efforts for several months to ensure a timely and successful launch. Although the $1.7 million planning amount may appear significant, it aligns with 2 CFR 200.458, which permits pre-award costs when properly documented. While we are hopeful for CSP funding, we plan to move forward with purchasing necessary items regardless of grant approval to meet critical operational deadlines. This approach supports the overall project timeline and ensures the school is prepared for opening day.

CSP funds will be used to equip the new facility with essential furnishings and items. This includes desks, tables, and chairs for students and staff to create a safe and engaging learning environment. A school-wide public address (PA) system will be installed for communication and emergency management, along with a Verkada camera security system, electronic door access controls, vape sensors, and doorbells to ensure safety and monitoring throughout the building.

To support technology integration and digital access, the school will purchase computers and devices for both students and teachers. These tools are necessary to support differentiated instruction, blended learning models, and administrative efficiency. Administrative equipment such as copy machines and printers will be purchased to support daily school operations. General supplies will be procured to fully stock all classrooms and ensure that every learning space is functional and student-ready.

Recognizing the importance of family and community engagement, CSP funds will also support outreach efforts to build relationships with local families, increase awareness of

the new school, and drive student enrollment. To fulfill the Charter School Program's priorities of equitable access, community involvement, and meaningful stakeholder engagement, WSA will implement a comprehensive, community outreach and engagement plan. This plan is designed to inform, empower, and involve families from diverse backgrounds—particularly those who are economically disadvantaged, English learners, or historically underserved.

To help eliminate transportation barriers, WSA will acquire two school buses to support daily transportation needs, field trips, and access for students who may otherwise be unable to attend due to distance or lack of reliable transportation.

Implementation Phase

In the implementation phase, grant funds will support the procurement of curriculum and instructional materials, including the *Reading Mastery* program and core English Language Arts (ELA) resources, to ensure strong literacy outcomes. A school library will be established with a broad selection of fiction and non-fiction titles to promote reading engagement and support academic achievement across grade levels. To promote student wellness and physical activity, PE equipment will be purchased to establish a physical education program.

Also, CSP funds will be allocated toward professional development and capacity building. Select teachers and administrators will travel to the Ron Clark Academy for immersive, high-impact training focused on dynamic instructional practices, classroom culture, and leadership. This training is a key component of WSA's staff development plan and supports long-term instructional excellence.

Accountability for Funds
Wallace Stegner Academy will ensure full accountability for the use of CSP funds through robust financial oversight and strict adherence to grant requirements. The school's finance team, led by certified professionals, will track all grant expenditures separately in the accounting system and report them accurately and timely in accordance with CSP guidelines. WSA maintains strong internal controls, including segregation of duties, documented procurement procedures, and approval workflows to prevent misuse of funds. Regular financial reports will be presented to the governing board for review, and annual independent financial audits will verify the proper use of funds and compliance with federal and state regulations. Additionally, all required grant documentation and reports will be maintained for monitoring and available for review by authorizers, auditors, and the Utah State Board of Education.

Conclusion

Wallace Stegner Academy has demonstrated consistent academic success across its three existing campuses. The addition of the Sunset campus will allow WSA to extend its impact and serve more students from disadvantaged backgrounds. With the support of CSP funding, WSA will be well-positioned to open a high-quality, fully equipped school in Sunset that reflects the academic rigor, strong culture, and student-centered focus that earned the school national recognition.

Wallace Stegner Academy's Sunset campus will be financially self-sustaining after the CSP grant period through stable state and local per-pupil funding, federal entitlement programs, and shared services across its existing network of schools. The school's conservative budgeting, multi-year financial planning, and proven track record of operating three successful campuses ensure long-term sustainability without reliance on grant funds.

This investment will directly support educational equity and access for students in Northern Utah, WSA is confident in its ability to open a successful fourth campus that continues its traditions of excellence and equity.

Wallace Stegner

Total points awarded with optional Competitive Preference Points   94.33

Section	Rubric Criteria	Max Points	Points Awarded	Reviewer Comments	
				Strengths	**Needs Improvement**
Executive Summary	[A1] 1. Concise and Compelling Overview: Presence of an executive summary – Is there a clear, well-structured summary? Clarity – Is the summary easy to understand and free from unnecessary jargon? Key information – Does it effectively outline the most critical elements of the application? Conciseness – Is the summary brief but still informative? Compelling nature – Does it engage the reader and provide a strong rationale for the school's existence and goals?	3.00	3.00	The overview is clear and concise. The need for higher academic performance in the expansion area is clearly described. - Strong opening clearly articulating their CSP goal and primary objective- to specifically support CSP target demographics. - Demonstrate success with data (strong data) - Clear articulation of how will spend CSP funds (overview)	
	[A2] 2. Alignment with ESEA § 4310 (2)Explicit mention of ESEA § 4310 (2) – Does the applicant reference the legal definition of a charter school?Autonomy and flexibility – How does the school demonstrate autonomy in staffing, curriculum, budget, and governance?Specificity – Are there concrete examples of how the school aligns with ESEA § 4310 (2), or is the response vague?Supporting details – Are there strong, relevant details to back up the claims of alignment?	3.00	2.67	They are ESEA distinguished and alignment with ESEA is clearly described. Per Capacity Interview: Good demonstration of how the purpose of the charter school was to pivot away from what the district mandates were in order to have an autonomous, unique model. Interview update: - Can change an pivot direction however and whenever they want. Ex- During covid SLC was shut down, Wallace was open . Tried three diff models and realized one didn't work so ended it (hybrid). - Visited another school in October and implemented take away in January across entire network. No red tape. - How does their specific model different from what a TPS would offer within curriculum?	Supporting details are missing.
	[A3] 3. Governance & Operational IndependenceGovernance structure – Is there a governing board, and is its role clearly defined?Operational independence – Does the school have the ability to make independent decisions about finances, staffing, and curriculum?Connection to mission – How well do governance and operational independence align with and support the school's mission?Decision-making process – Is there a clear and effective structure for making key operational decisions?	3.00	2.33	The board clearly supports the expansion based on approvals from USCSB. Page 25-27: Yes, has board; Yes, makes indep decisions;	There is no tie of how the governance and operational independence support the school's mission and ensures effective decision-making. Per Capacity Interview: Decision making was clearly outlined. There was no mention of the role of the board and board governance. Small board of directors. Could be clearer in defining of roles within the administration.

Section	Rubric Criteria	Max Points	Points Awarded	Reviewer Comments	
				Strengths	Needs Improvement
Educational Model Project Design	[B1] 1. Educational Model & Growth Strategies (Math & ELA)Does the application clearly describe the school's educational model?Are the strategies for improving student outcomes in math and ELA well-defined and research-based?Does the applicant provide measurable goals and support for student success?	3.00	2.67	There is a lot of detail given regarding precedence and performance in their other campuses. The comparison data between the current campuses and their target area provides a good outline for the justification for expansion. Uncommon Schools model; lists various elements of model. Interview Update: Model- teach like a champion that gives skills to teachers to use in classrooms; magic 11 (observations- coaching tool based on TLAC), data-teams to discuss achievement, high structure, student and family engagement Leveled-instruction to test where students are at BOY rather than grade-based. Teach skills as quickly as possible and move to next level as quickly as possible. Use data to track. Strategies: Curriculum- combine many into 1 to cover core. Changes to meet needs of students. Personalized instruction- look at what haven't learned through data --> SGI (lunch, after school, during indep work Instructional model- direct instruction for novice learners; "quick write"- ask stud's to write down answer to questions --> turn and talk --> verbal response to class/discussion; summative writing	There are no details given regarding their educational model. There are no measurable goals provided. Per Capacity Interview: An individualized model for improving growth scores based on student data was described.
	[B2] 2. Growth Plan & Enrollment StrategyDoes the application outline a clear and realistic growth plan, including grades served and projected enrollment?Are there well-supported strategies to ensure enrollment targets are met?Is the plan detailed, feasible, and aligned with the school's long-term vision?	3.00	2.00	Per Capacity Interview: Additional details about canvassing were given. There were still no details about targeting special populations. Data around number of students to pull from. Cite ambitous start data and say they have a marketing plan and budget considering lower enrollment in Y1 Page 13- School outreach- open houses, marketing and print campaing, mailers, signage, connections with local CBOs, info booths at local events Interview update: - marketing push with surrounding charters. Building has 21 classrooms. This year goal- small. Relying on word of mouth and results, full up next year- 2 classes in every grade. - Current enrollment- no waitlist. 100 applications- will all enroll? Y2 will have 400; Y3 full enrollment - plan to hit targets- different marketing materials, get into community (farmers market, mayor meeting, reached out to daycares), mailers, community flyers, reach out to local religious organizatios. Different from other campus because had presence in community Have over enrollment in other campuses to level out finances.	"We're going to do what we've done before" does not provide enough detail for a clear understanding of the growth plan and enrollment strategy. Having a good curriculum and educational methods are great ways to sustain growth, but they do not explain how you are going to get students in the door to begin with. The parts of the plan that are described throughout the application lack specifics and only mention translation as a means of diverse recruiting strategies. There was no enrollment growth plan by grade and year to compare to enrollment and budget strategies.
	[B3] 3. Professional Development Plan (Planning & Implementation)Is there a well-defined professional development plan for both the planning and implementation periods?Does the plan ensure that administrators and teachers are adequately prepared to implement the educational model effectively?Is there a clear connection between professional development efforts and the proposed educational model?	3.00	2.67	Good description of how peer reviews and coaching is used as part of the model. A lot of observations, 2 weeks of PD; Solid feedback loop. Interview update: - Magic 11 in class observations by Principal; PD in teach like a champion. Seem very intentional about training within the TLAC model. - Ability based training at BOY for all staff; new teachers have add'l track to learn school specific. Divide teachers into groups based on leadership eval of what they need to work on. - During year, all staff do same training together. Ensure best teachers lift up those that need support -admin give pd; use videos of wallace teachers now instead of teachers from other schools For admin: - nat'l charter conference, visits to root schools that they take models from.	There is no description of how the PD will be implemented during both the planning and implementation periods. Clear alignment with the proposed model is not described. Per Capacity Interview: Traveling to model schools is described, but not enough assurance was given that faculty will be prepared before the start of school as opposed to preparing as a result of peer reviews once school has started.
	[B4] 4. Alignment with Mission & VisionDoes the project design align with the school's mission and vision?Is there a strong connection between the educational model, growth plan, and professional development plan?Does the application demonstrate how these elements will contribute to the school's long-term success?	3.00	2.67	There is a good connection between the need for expansion in the targeted area based on the mission of the school. The project design to locate a new building in an area that suffers from low achievement is connected to the school's mission and vision Interview update: - Clear connection b/w ed model and PD. They believe that this ed model serves as the base for future growth.	The growth plan and professional development plan lack clear detail and do not describe how they are related to the mission or to each other.
	[B5] 5. Feasibility & SustainabilityDoes the application address the feasibility and sustainability of the project design?Are there clear plans for funding, staffing, and resource allocation to ensure long-term success?Does the applicant provide strong evidence that the school can sustain and scale its model over time?	3.00	2.00	Per Capacity Interview: Details of using over enrollment on one campus to support the new campus was provided. Recruiting strategies were more clearly defined and seem feasible. Interview update: - If dont hit enrollment goals this year, have extra enrollment in other campuses to offset finances The school has a long track record of growth and sustainability to back up it's projections. Very good demographic research.	There is no mention of how the project will be sustained over time.

Section	Rubric Criteria	Max Points	Points Awarded	Reviewer Comments	
				Strengths	Needs Improvement
Educational Model Project Goals	[C1] 1. SMART GoalsDoes the application provide clear, specific, and measurable SMART goals?Are the goals realistic and time-bound, with clear benchmarks for success?Do the goals align with project activities and budget allocations?Does at least one goal explicitly target ELA or Math growth for educationally disadvantaged students?	3.00	2.67	Great descriptions of goals with measurability and accurate timelines. Nice inclusion of the professional development goal. Consider including a goal for specific content of the PD and not just a set number of hours. Good goals. This school has probably more experience than any other in the state in working with underserved and ELA students. Goals track with their previous experience.	Consider including a goal for specific content of the PD and not just a set number of hours.
	[C2] 2. Goal Tracking & Progress MonitoringDoes the application include a structured system for tracking progress toward goals?Is there a clear plan for data collection, including how progress will be measured over time?Does the plan incorporate disaggregated data analysis to track outcomes for different student groups?Are there regular progress reviews built into the system, ensuring that data informs decision-making and program adjustments?	3.00	3.00	Good description of how data will be tracked, how progress will be reported, and how the progress will affect professional development and training through coaching cycles. Teachers and instructional leaders will use results from Acadience reading assessments to adapt small-group instruction, target interventions, and inform curriculum pacing. Internal interim benchmarks and classroombased assessments will provide timely data to assess whether students are on track to meet proficiency targets in ELA and Math - monthly data meetings; quarterly review, reports Evaluation of PD relevance and effectiveness	
Plan for Serving Student Needs	[D1] 1. Strategies to Monitor & Improve Academic OutcomesDoes the application outline specific, evidence-based strategies to monitor and improve academic outcomes?Are there clear benchmarks and interventions for student progress?Does the plan include differentiated supports to meet the diverse needs of students?	3.00	3.00	Good descriptions of direct instruction and your coaching/observation model to improve student learning. Per Capacity Interview: Tracking of data and building small, targeted groups was described.student data analysis and response is a core part of the educational model. - specific academic english language classess for ELL - personalized classes, after-school tutoring, after-school enrichment - mentioned interventions in another section - From last section, teachers give assessments and analyze trends Interview update: - Lot of data tracking, use of assessments. Sub groups have SGO and/or receive interventions according to IEP. If notice somehting is different then they will address.	There is no description of an actual plan other than students voluntarily attending study hall. No clear benchmarks or interventions are mentioned.
	[D2] 2. Identifying & Addressing Needs of Underserved & Educationally Disadvantaged StudentsDoes the application clearly define how underserved and educationally disadvantaged students will be identified?Are there specific strategies to support students with disabilities, English language learners (ELLs), and economically disadvantaged students?Does the plan include specialized staff, interventions, or individualized supports to address student needs?	3.00	3.00	Per Capacity Interview: Use of paraprofessionals was described along with additional clarity on ability grouping and targeted interventions. Use of four stations in each classroom was clearly described. - MTSS, RTI for Tier 2 (SWD, ELL), Tier 3 (SPED, ELL) based on assessment data - include parents in developing IEPs - ELL- sheltered instruction, language support programs, and specialized instruction by a highly qualified teacher who provides specific language instruction to those students. Interview update- - FRL- identify by FRL form - ELL- BOY screen and then have ESL classes based on their level. Most ELLs do better with peers (learned over time) bc of communication, consistent immersion with english. BUt if lower lever may have special esl to get spoken english up - SPED- inheritied files. Haven't been identified- use data. If kid consistently struggled on assessments, benchmarks, other ways. They bring that up to see about Tier 2/3 interventions. If no repsonsive, triggers IEP meeing. - Solid structure for MTSS identification, grouping, execution, tracking, differentiation (set up to do up to four groups of learning at same time- computer, indiv, pull outs with para	Good description of how learning goals are performance based. Tier 2 interventions are mentioned and that they are evidence-based, but there is no description of what they actually are. There is mention that each of the underserved population groups are identified and supported but there are no details on how they are identified and supported.
	[D3] 3. Equitable & Inclusive PracticesDoes the application demonstrate a commitment to equity and inclusion with concrete policies?Are there clear implementation steps to ensure all students have access to high-quality education? Does the plan incorporate culturally responsive teaching, accessibility accommodations, and inclusive policies?	3.00	2.67	Large majority of students are econ disadvantaged; diverse and inclusive curriculum; say they have a robust ELL curriculym with trained educators, comprehensive SPED services Policies for equity History classes for many different cultures	The existence of plans and policies are described, but they lack detail. There are no execution strategies defined, just descriptions that they exist based on the makeup of the student population.

Section	Rubric Criteria	Max Points	Points Awarded	Reviewer Comments Strengths	Needs Improvement
Family and Community Involvement	[E1] 1. Family & Community EngagementDoes the application outline specific, sustainable strategies to engage families and the community?Are engagement efforts aligned with the school's mission and designed to build long-term partnerships?Are there clear, actionable plans for ongoing communication and involvement?	3.00	2.67	Good descriptions of communication tools that are used among students and their families. Communication, basic engagement strategies. Will engage with local CBOs to provide resources Interview update: - weekly town hall with new families; science night; reading at home resources; math night to increase parent engagement; readathons at night; bingo night; intramurals - Received feedback that parents don't want kids in front of screens all day long, so communicated how much they spend and ensure don't spend too much - Use examples from their school to address concerns that families have- distractions, bullying, too much tech	
	[E2] 2. Opportunities for Family & Community Decision-MakingDoes the application clearly define how families and community members will be involved in decision-making?Are there structured opportunities for input, especially for underserved populations?Does the plan go beyond token engagement to ensure meaningful contributions from stakeholders?	3.00	3.00	Good descriptions of use of surveys and focus groups along with community liaisons. multi-lingual surveys and focus groups to understand needs and perspectives' Translation and interpretation services; School-wide communication platform can be in Spanish working with community-based family liaisons to est connection Interview update: - office staff are bilingual	
	[E3] 3. Pre-Operational Engagement & Stakeholder FeedbackHas the applicant demonstrated proactive outreach to families and the community before opening?Is there evidence of stakeholder feedback, and does the application explain how this feedback shaped the school's planning?Does the plan include relationship-building strategies to establish trust and community buy-in?	3.00	2.67	Good descriptions of how information was given in the community and how the school leaders were open to feedback on the purpose and culture of the school. Also good descriptions of how parent input is used to alter and improve the daily operations of the school. There is no information about how the data was used in the decision making process for expansion. Demographic data was clearly used to justify the expansion, but nothing is mentioned about the desire expressed by the community. - 4 Community listening sessions with neighborhood groups- gathererd educational needs and aspirations - Info sessions at local CBOs about school model - bilingual surveys- transpo, extracurric, culture preferences - Shared building designs - Reinforced structure based on feedback, bi-lingual comms and staff, limiting screen time Their previous efforts with outreach demonstrate their commitment to community engagement.	There is no information about how the data was used in the decision making process for expansion. Demographic data was clearly used to justify the expansion, but nothing is mentioned about the desire expressed by the community.
	[E4] 4. Inclusive Recruitment, Admissions, & Retention StrategiesAre there clear, inclusive strategies for recruiting and enrolling diverse students?Does the plan address accessibility and equitable participation, including multilingual outreach, flexible event times, and accommodations for families?Are there specific retention strategies to ensure long-term engagement and support for families?	3.00	3.00	A variety of strategies were described including the use of materials in multiple languages. bi-lingual marketing materials and staff, going into community. Clear attempts to make it accessible. Interview update: - Biggest retention strat is high quality instruction and safe learning environment. Many families leave and return - Low income families are more transient- may leave becaue of rent/job, return even with longer commutes Their policy of teacher/parent communication and giving out business card with cell numbers is admirable.	No description in variation on the time of day.

Section	Rubric Criteria	Max Points	Points Awarded	Reviewer Comments	
				Strengths	Needs Improvement
Community Support and Demand	[F1] 1. Projected Enrollment & Demographic AnalysisDoes the application include data-driven enrollment projections that reflect realistic community demand?Has the applicant used the UAPCS 2025 Demographic Data Calculator to compare projected enrollment with local demographics?Is there a clear needs analysis demonstrating demand for the proposed school?	3.00	2.67	Great description of the demographics of the area including census data and expected population growth. .Realistic that not getting students due to growth, rather focusing on underserved populations and that their model would be superior to competing district models - Yes, school compared projected enrollment with local demo - Yes, provided clear needs analysis based on lower achievement levels	Although the school gave district data of the number of students in the target area, no correlation was given as to what the previous experience has been as to what percentage of students they could expect to get from those numbers.
	[F2] 2. Strategies for a Diverse Student BodyDoes the plan include specific, legally compliant strategies to recruit and retain a diverse student body?Are there clear efforts to ensure racial, socio-economic, and linguistic diversity?Does the application provide a sustainable approach to diversity beyond just initial recruitment?	3.00	2.67	ML marketing and staff. Lcoation of school and local population Resources to assist through application process Family Liaisons This is their whole mission and have done so on 3 previous campuses.	While good comparison data is mentioned and a thorough description of the lottery process is provided, there are no actual strategies described. Past performance in a different area is not necessarily a predictor of future results in this area. The existence of translation services is not a comprehensive recruitment strategy.
	[F3] 3. Alignment with Community NeedsDoes the school's mission and location align with identified community needs?Is there a clear plan for leveraging community partnerships and resources?Does the application ensure accessibility and equity for all students, particularly those in underserved areas?	3.00	2.33	Good use of existing facilities, especially with regard to hopefully enrolling families who would have attended the school that is now closed. Good description of the lottery process. Mission aligned with needs. Seems like they will ensure accessibility for all students. Interview update: - highlights that charters can pull from any district. Minimize imp of local community and its needs? - Seems like they make the community fit with their school rather than making adjustments to meet the community - Applicant says the community is very happy for them to occupy the old building- many of the enrolled students are from the previously closed school. - Community partnerships- training local church's private school on Wallace's techniques, kids that can't go to their school are referred to Wallace. Boys and Girls club for after school Their willingness to be part of the Davis Education Network will be helpful in maintaining good district school relations.	There are no details of ensuring accessibility on assurances that it will be provided.
	[F4] 4. Desegregation & Legal ComplianceHas the applicant demonstrated an understanding of legal obligations related to desegregation?Are there specific steps to ensure compliance with court orders, desegregation efforts, and diversity commitments?Does the plan go beyond general compliance to include proactive efforts for maintaining an equitable and inclusive enrollment process?	3.00	3.00	ML support, cult responsive teaching. MIssion to serve target demo. Understands legal committment	
Transportation Plan	[G1] 1. Reliable & Equitable Transportation PlanDoes the plan clearly define how students will be transported to and from school?Is the transportation plan safe, reliable, and cost-effective?Does it comply with all state and federal regulations, including requirements for students with disabilities?Are there specific strategies to ensure equitable access for students from various socio-economic backgrounds?	3.00	3.00	Great descriptions of the plan for transportation including prioritization of zones and high need students. funds to purchase buses. Collab with local transit authorities for subsidized passes. Interview update: - will plot addresses in Gmaps to create hubs for student pickups - Public transportation is not an option for this location - Noted that 15 passenger is not enough- that budget is reflective of 50-passenger bus Have not really formulated a plan yet.	
	[G2] 2. Accessibility & Location ConsiderationsHas the applicant considered the school's location and how it impacts student access?Are there provisions for students who cannot walk or use public transportation?Does the plan address walkability, access to public transportation, and alternative transportation options?Are cost and feasibility considered to ensure sustainable and effective transportation solutions?	3.00	3.00	Great data and breakdown of the demographics in the vicinity of the school. Building located in neighborhood of target demo. Lot of potential students living within 1 mile of the potential building Using the retired facilities of a district school in a neighborhood that just lost their school will be a great benefit to the local community.	This area could be stronger on addressing the needs for disabled students.

Section	Rubric Criteria	Max Points	Points Awarded	Reviewer Comments	
				Strengths	Needs Improvement
Lottery Process	[H1] 1. Lottery Notification, Process, and EnrollmentDoes the application provide a clear and detailed lottery process?Is there a well-defined notification plan and timeline?Does the process follow a random and fair selection method, with exemptions (if applicable) clearly explained?Are waitlist procedures and management strategies outlined to ensure equal access for all families?If a weighted lottery is used, does the applicant provide a justified rationale, weighting system, and implementation timeline?	3.00	2.67	The lottery process and preferences are thoroughly explained. outreach focusing on low-income, multi-cult students, ELL, and other underserved clear lotttery process, clear timeline, random method, waitlist procedure good	There are no details concerning the enrollment process after the lottery is conducted other than mentioning that families receive an enrollment packet.
	[H2] 2. Student Recruitment, Equity, and AccessDoes the school have a comprehensive recruitment plan to engage all community segments?Are there explicit strategies for reaching underserved and educationally disadvantaged students?Is the lottery process clearly described as fair, transparent, and non-discriminatory?Are waitlist management policies, notification procedures, and timelines accessible and clearly communicated to families (e.g., on the school's website)?	3.00	2.67	There is a good variety of methods of recruitment mentioned. Recruit students using various means, though don't have too many details. Targeting underserved families- mailers, ML materials, partnerships with CBOs (though no examples proivided)	There are no specifics regarding how non-discrimination practices are used. Only an assurance that they are used.
Governance, Autumy and Project Administration	[I1] 1. Board Member Information & RolesDoes the application provide a complete list of board members, including names and contact information?Are the roles and expertise of each board member clearly defined, demonstrating alignment with school oversight and governance needs?Does the board composition reflect the community's needs, ensuring diverse and well-rounded leadership?If applicable, are partner roles clearly described in relation to the board's governance?	3.00	2.67	The roles and information regarding the board members are clearly laid out and defined. Yes- complete list of board members Board members have long tenure- PM, Data, work with ESL, Sales, start up and operations, finance, community bank to help improve low-income neighborhoods, non profit management Academica West - School business services vendor- including budget preparation, financial reporting and forecasting, accounting, tax filings, audit support, purchasing, policy development, administrator and SIS support, HR, CACTUS reporting, recordkeeping, board clerk services, enrollment and registration assistance, payroll, employment notifications, facility support, and bookkeeping Board manages AW Interview update: - missing solid K-12 experience. They can ask questions...but only if they know to ask those questions. How do they know that some of the high stakes practices of the school are right? They are more making sure there is a plan.	
	[I2] 2. Project Management & Support TeamDoes the application identify a project manager and key support team members? Are their roles, responsibilities, and expertise clearly outlined?Is there a structured plan for how the project will be managed within budget and timeline constraints?Have all required documents been uploaded to support the project administration?	3.00	2.67	Key members are identified and assurances are given that there will be oversight and internal monitoring. Yes, identification of PM. Yes, experience outlined. Yes, support members identified.	There are no details as to how the project monitoring will occur.
	[I3] 3. Administrative Relationship & AutonomyIs the relationship between the school and authorizer clearly described?Does the application specify the level of autonomy and flexibility granted to the school?Are the services provided by the authorizer well-defined?Does the description align with ESEA § 4310 (2) regarding charter school autonomy?	3.00	3.00	The administrative relationship and responsibilities of the school with regard to its authorizer is clearly described along with compliance with ESEA guidelines for a charter school. Discuss autonomy in relation to governing board managing the school- don't discuss flexibility in how model is flexible Relationship b/w two discussed. Services by provider well-defined.	
	[I4] 4. Quality Controls & Accountability MeasuresAre there clear quality control mechanisms in place for governance, operations, and performance management?Does the application outline accountability measures, including performance agreements, financial oversight, and operational compliance?Are there defined criteria for contract renewal, revocation, or intervention in case of non-compliance?Does the school provide a comprehensive plan to ensure financial and operational sustainability?	3.00	2.33	Per capacity interview: One general performance measure was defined. outlines the performance agreements school must have. Interview update: - Board primarily oversees rather than manages. Addressed that they have a very sound financial practices at the school level that don't require the board to step in. - School EDs report directly to board. Board communicates with authorizer about acad and financial reports. Work closely with academica west to ensure money spent is tagged correclty and alinged with goals and alowwable cost. - Quality control- outperforming surrounding schools in ELA, Math, Science.	Assurance is given of the existence of quality controls and performance measures, but no details are included.

Section	Rubric Criteria	Max Points	Points Awarded	Reviewer Comments	
				Strengths	**Needs Improvement**
Financial Management	[J1] 1. Budget Narrative – Expenditures & JustificationDoes the budget narrative clearly detail all expenditures, particularly for personnel costs?Are the justifications for each expense aligned with the planned activities?Does the budget rationale explicitly state how personnel costs fit within the planning period?Is there a strong connection between financial planning and programmatic goals?	3.00	3.00	Justifications and expenditures are clearly outlined. There is a clear tie between purchases and planned activities. Plan to move forward with financial commitments regardless of grant outcome and based on project timelines Yes, clear details; Yes, justifications; Yes, connection b/w planning and goals No personnel costs. Well prepared and defined. PDF of quotes very helpful.	
	[J2] 2. Planning vs. Implementation Period ActivitiesDoes the budget clearly differentiate between planning and implementation phases?Are all activities logically categorized within the appropriate phase?Does the distinction between planning vs. implementation align with the overall project narrative?	3.00	2.67	Allocation of funds are clearly delineated between phases.	
	[J3] 3. Budget Phase DelineationIs the budget structured with a clear breakdown of fund allocation between planning and implementation?Are all expenditures properly categorized within the respective phases?Does the budget correspond to the overall project plan, ensuring logical and strategic financial planning?	3.00	3.00	Planning and implementation phases are clearly defined and expenses are clearly allocated in each.	Might have been helpful to see cost codes.
	[J4] 4. Accountability for FundsDoes the application include a clear financial accountability plan?Are internal controls, financial reporting, and audit procedures well-defined?Does the applicant demonstrate compliance with grant requirements and best practices for financial management?Is there a plan to ensure transparency and fiscal responsibility throughout the grant period?	3.00	3.00	All aspects of financial accountability are clearly described. Addresses sustainability by stating school will be sustained by state and local ppf, federap programs and shared services among schools. school demonstrates robust staffing and infrastructure to manage the grant appropriately Contracted with a proven financial management firm.	
	[J5] 5. Post-Grant SustainabilityDoes the applicant provide a realistic sustainability plan for financial stability after the grant period?Are there identified funding sources and a long-term financial strategy?Is there a clear roadmap for maintaining operations once grant funds are no longer available?Does the sustainability plan demonstrate feasibility and alignment with the school's growth projections?	3.00	2.00	Addresses sustainability by stating school will be sustained by state and local ppf, federal programs and shared services among schools. Interview update: - have staff hired - ready to pull trigger immediately to spend. Many items are purchased and will back date to grant if win grant Proven track record of sustainable growth.	Post-grant funding is reliant completely on the WPU. Some description is given of shared resources and a positive financial track record, but there is no description of a back-up plan in case enrollment does not increase as expected.
Overall Review Comments				The data given is clearly outlined and presented in a way that is understandable and approachable. Overall, I think this school makes a solid argument to receive CSP grant funds. The opeening of a replicated school in an underserved community seems needed, especially when considering the test scores of surrounding districts and the school's historic success at other sites. I have faith in the network's capacity to manage the grant responsibly and be financially sustainable upon sunset of the grant Interview update: - This school demonstrates a very clear idea of what they're doing and what they're going to do with the grant funds. They have demonstrated academic success through their results in other schools in the network. I have still have some concerns about meeting enrollment goals and the applicant did not adequately address their sustainability model. I am willing to give the benefit of the doubt based on their historical success. At the same time this is a new and unfamiliar model. - Overall, I am confident they will spend the funds appropriately and be successful in the future.	The project is written like a set of assurances with descriptions that many of the project requirements exist, but the lack of details for project execution, professional development, methods of instruction or measurement of student outcomes, and sustainability, make it difficult to assess the plan. While prior positive results are valuable they are not necessarily a predictor of future success, especially in a new geographic area. Per capacity interview: Much clarity was provided through the interview process. There is still concern about the support from the community. A lot of outreach will be needed. It is also concerning that only the director and the board participated in the interview. This left questions about the support from both the internal and external communities. Missing: - details on the education model - details on timeline of activities considering a very quick turnaround - Projected enrollment plan and how they really plan to meet their goals - What they will do if they do not secure the building. How to secure it ASAP AND prepare it for Day 1. The timeline just seems too tight to do any of this for this Fall. It also seems like they have general outlines but are rushed and do not have specific plans to open the school. Though the budget items are very detailed, so it leads me to think they do have plans that are just not reflected in this application.

Section	Rubric Criteria	Max Points	Points Awarded	Reviewer Comments	
				Strengths	Needs Improvement
		10	2.33		
Competitive Perference Priorities	[PP1] Applicants are evaluated on their ability to demonstrate innovation in their charter model. Applicant clearly addresses a specific unmet need in the target community.	1	0.67	Knowledge of the existing Davis Educational Network is valuable. Discusses collaboration with local district without details about roles and who adds what and how success is measured	There is no description of the way the school will contribute to the network or what team member is assigned to outreach and support in this area. - I don't see how the school is necessarily innovative because there aren't really any specific details about the ed model besides that it reflects that of Uncommon Schools. - No information about HQ HS or rural needs
	[PP2] Additional Points may be awarded for schools that provide a high-quality high school program.	2	0.00		
	[PP3] Additional Point may be awarded for schools that articulate meeting rural needs.	1	0.00		
	[PP4] Additional Points may be awarded for schools that define clear strategies to promote educator and community engagement. Demonstrates commitment to supporting underserved students.	2	0.67		
	[PP5] Charter School/Traditional Public School Collaboration	1	0.33		
	[PP6] Clearly describes each member, stating whether the collaboration is new or existing and defining its purpose and duration.	1	0.67		
	[PP7] Outlines roles and responsibilities of each member, explaining how the collaboration benefits students, families, or schools.	1	0.00		
	[PP8] Identifies resources each member will contribute and, if applicable, includes specific, measurable goals for collaboration success.	1	0.00		