# Monticello Academy – West Point

**State:**

Utah

**PR Award Number:**

S282A240002

**Duration (Years):**

27 Months

**Year 1 Funding:**

$1,135,343

**Total Expected Funding:**

$2,000,000

**Monticello Academy**

**Address:**
3110 W 300 N
West Point, UT 84015

**Grades Served**: K-9

**Director Contact:**

Dane Roberts

**Director Email:**

dane.roberts@monticelloacademy.net

**Director Phone:**

(801) 417-8040

Monticello Academy West Point is designed to deliver a college-preparatory curriculum for all students, regardless of background. The school's educational model is anchored in a disciplined focus on high-quality curriculum and strong instruction, including the Core Knowledge sequence to systematically build students' background knowledge and vocabulary over time, and Singapore Math to provide a coherent, mastery-oriented approach to mathematics. The expectation is that every student can meet rigorous academic standards when provided aligned content, effective teaching, and consistent supports.

The instructional program is intentionally well-rounded and interdisciplinary, and it is built with access and equity in mind. Core Knowledge is a content-rich curriculum designed to ensure that all students—regardless of prior opportunity—gain the shared background knowledge and academic vocabulary that underpin long-term reading comprehension and success across subjects. This emphasis is especially supportive for multilingual learners because it reduces reliance on hidden cultural knowledge and makes essential content explicit and cumulative. Similarly, Singapore Math is designed around clear representations, consistent structures, and precise language routines that support conceptual understanding for a wide range of learners, including students developing academic English. Core academic priorities in English Language Arts and mathematics are reinforced through connected learning experiences that integrate physical education, fine arts, and computer science into the broader scope of students' content knowledge and skill development, supporting both academic growth and engagement.

**Goal 1:** ELA Growth (RISE MGP) for Educationally Disadvantaged Students—By the end of Implementation Year 2, educationally disadvantaged students at Monticello Academy West Point will increase RISE Median Growth Percentile (MGP) in ELA from the 2023–2025 three-year average by five MGP points, as reported on the Utah state growth report (RISE MGP).

**Goal 2**: Math Growth (RISE MGP) for Educationally Disadvantaged Students—By the end of Implementation Year 2, educationally disadvantaged students at Monticello Academy West Point will increase RISE Median Growth Percentile (MGP) in Math from the 2023–2025 three-year average by five MGP points, as reported on the Utah state growth report (RISE MGP).

**Goal 3**: Equitable Enrollment Growth and Access—By the end of the 2027–28 school year, Monticello Academy West Point will enroll and sustain 260 additional seats attributable to grant-funded expansion. As an equity indicator of expanded access, enrollment of students residing in Clearfield, Sunset, and Hooper will increase from 102 to 204 students.

**Goal 4**: Academic Program and Facility Readiness—By the end of the 2027–28 school year, Monticello Academy West Point will fully implement and sustain the expanded academic program by ensuring that the additional instructional space required for the expansion is activated and ready for use documentation sufficient for grant monitoring and reimbursement.

# Monticello Academy
# CSP Project Narrative

## 2. Education Model

### 2A. Project Design

#### General Program Design

Monticello Academy West Point is designed to deliver a college-preparatory curriculum for all students, regardless of background. The school's educational model is anchored in a disciplined focus on high-quality curriculum and strong instruction, including the Core Knowledge sequence to systematically build students' background knowledge and vocabulary over time, and Singapore Math to provide a coherent, mastery-oriented approach to mathematics. The expectation is that every student can meet rigorous academic standards when provided aligned content, effective teaching, and consistent supports.

The instructional program is intentionally well-rounded and interdisciplinary, and it is built with access and equity in mind. Core Knowledge is a content-rich curriculum designed to ensure that all students—regardless of prior opportunity—gain the shared background knowledge and academic vocabulary that underpin long-term reading comprehension and success across subjects. This emphasis is especially supportive for multilingual learners because it reduces reliance on hidden cultural knowledge and makes essential content explicit and cumulative. Similarly, Singapore Math is designed around clear representations, consistent structures, and precise language routines that support conceptual understanding for a wide range of learners, including students developing academic English. Core academic priorities in English Language Arts and mathematics are reinforced through connected learning experiences that integrate physical education, fine arts, and computer science into the broader scope of students' content knowledge and skill development, supporting both academic growth and engagement.

This model is proven within the Monticello Academy network. An existing junior high campus demonstrates strong academic outcomes relative to geographic peers, providing evidence that the program design and instructional approach are effective at the secondary level. The proposed project applies that proven model to the West Point campus by expanding grade-level capacity in grades 6–9. West Point currently serves grades K–5 and a partial 6th grade cohort; however, demand has outpaced the capacity of existing instructional space, requiring the school to convert shared spaces into classrooms to accommodate current enrollment. This project will enable the school to furnish and activate additional space that is currently under construction, allowing Monticello Academy West Point to bring in additional students on a faster timeline while maintaining fidelity to the established college-preparatory program design for grades 6-9.

#### Growth Strategies that Apply to Math and ELA

Monticello Academy West Point strengthens student growth in both English Language Arts and mathematics through a disciplined instructional improvement cycle grounded in high-performing charter school practices. Over the past three years, the school has maintained an ongoing collaboration with Success Academy in New York City, one of the highest-performing networks in the nation. During this period, Monticello Academy has brought four cohorts of teachers and administrators to observe high-leverage practices in action, with a particular focus on how Success Academy structures data-driven professional learning communities.

A core strategy adopted and adapted from this work is the use of structured data meetings within PLCs. School teams analyze student work and assessment results to identify specific misunderstandings, diagnose root causes, and surface patterns of underperformance—particularly for student subgroups that may require differentiated support. These meetings are designed to translate analysis into action: teams agree on instructional responses, determine reteach priorities, adjust small-group supports, and align upcoming lessons to address gaps with clarity and urgency. As these routines have become more firmly established each year at Monticello Academy West Point, the school has observed strong student growth outcomes, reinforcing the importance of consistent implementation.

The school has also drawn from other high-performing charter networks, including Uncommon Schools, by incorporating Teach Like a Champion instructional techniques that support strong academic habits, high behavioral expectations, and consistent lesson execution. These practices establish a classroom environment where rigorous learning can occur daily and where students experience clear routines and high expectations across classrooms. To support fidelity of implementation, Monticello Academy has built teacher feedback routines that provide frequent, actionable coaching. Teachers receive targeted feedback on key instructional practices at least biweekly, and more often as needed, creating a culture of continuous improvement in instruction.

Grant funding will support the continuation and deepening of these cross-cutting growth strategies for grades 6–9 by sustaining professional development, coaching, and implementation routines that directly strengthen instruction and accelerate student growth in both ELA and mathematics.

### Math Growth Strategies

Monticello Academy West Point's math strategy is explicitly designed to annually improve student Median Growth Percentiles by combining high-fidelity Singapore Math instruction with disciplined, data-driven reteach and acceleration cycles. The school will use a consistent instructional cadence in which teachers deliver standards-aligned lessons, administer frequent checks for understanding, and use student work to diagnose misconceptions quickly so that instructional time is focused on the highest-leverage needs for growth.

Singapore Math serves as the core instructional approach for building both conceptual understanding and procedural fluency. Instruction emphasizes coherent progression of concepts, explicit problem-solving strategies, and representations that make mathematical thinking visible. Teachers routinely guide students from concrete and visual models to abstract reasoning, strengthening students' ability to explain their thinking, apply concepts in multiple contexts, and persist through complex problems. This approach supports a wide range of learners by reducing ambiguity, building academic language through consistent routines, and providing clear structures for reasoning and computation.

To translate instruction into measurable growth, math teams will implement structured PLC data meetings that analyze assessment results and student work to (1) identify specific skill gaps and misconceptions, (2) determine the root causes of errors or lapses of student effort, and (3) assign targeted instructional responses. These responses include short-cycle reteaching, small-group instruction aligned to identified needs, targeted practice designed to correct misconceptions, and extension tasks for students ready to accelerate. Teachers then reassess using aligned measures to confirm mastery and adjust instruction, creating an ongoing cycle that is intentionally built to drive year-over-year improvement in median growth.

CSP grant funding will strengthen this approach by supporting continued professional development and coaching in Singapore Math methods as the school expands grades 6–9. This ensures teachers have the content knowledge and pedagogical skill to implement the curriculum with fidelity, sustain consistent lesson execution, and maintain the data-driven improvement cycle that underpins annual gains in math Median Growth Percentiles.

### ELA Growth Strategies

Monticello Academy West Point's ELA strategy is explicitly designed to annually improve student Median Growth Percentiles by pairing a knowledge-rich Core Knowledge literacy approach with high-leverage comprehension instruction, structured writing, and disciplined data cycles. In addition to informing the school's general PLC routines, the school's collaboration with Success Academy has directly shaped ELA classroom practice: Monticello Academy educators have observed Success Academy ELA instruction and intentionally adopted and adapted their highest-leverage reading comprehension routines for daily use in grades 6–9.

Instruction emphasizes a narrow set of high-impact reading practices that drive comprehension growth, including consistently identifying main ideas and themes in both nonfiction and literature, grounding claims in evidence from the text, and building academic vocabulary and background knowledge through content-rich reading. Teachers explicitly model how proficient readers make meaning—visualizing, monitoring understanding, and returning to central ideas as they read—so that students internalize these strategies and apply them independently. Classroom instruction prioritizes sustained student thinking through structured discussion routines, including frequent turn-and-talks and whole-group text-based conversations that require students to articulate ideas, respond to peers, and refine understanding.

In addition to grade-level ELA instruction, students participate in a literacy block four times per week (approximately 45 minutes per session) to ensure that all learners receive targeted reading instruction based on assessed needs. Students requiring foundational support engage in systematic, phonics-based interventions aligned with the science of reading. For students with persistent decoding challenges at the secondary level, Monticello uses the REWARDS program, an evidence-based intervention focused on multi-syllabic word fluency, morphology, and advanced phonics patterns. On-level and advanced readers participate in Junior Great Books, a text-based, inquiry-driven program that strengthens close reading, interpretation, and evidence-based discussion. This tiered structure ensures that each student receives high-leverage instruction matched to need, supporting accelerated growth across proficiency levels.

Writing is used as a primary driver of reading growth. Students regularly write in response to texts to demonstrate comprehension, explain themes and main ideas, and support interpretations with evidence. Teachers use exemplars and clear criteria to model strong written responses, and students receive feedback that targets the skills most connected to growth—accurate understanding of the text, use of evidence, organization, and academic language. These writing-to-read routines make comprehension measurable and visible, enabling teachers to diagnose misunderstandings quickly and address them before they become persistent gaps.

To translate daily instruction into measurable growth, ELA teams implement a consistent cycle of frequent checks for understanding, analysis of student work, and targeted reteaching and acceleration. Teachers use short-cycle comprehension tasks and writing samples to identify misconceptions (for example, confusing main ideas with details, weak evidence use, or misreading key passages) and then respond with focused small-group instruction, revised text-dependent questions, and targeted practice aligned to identified needs. Teachers reassess with aligned tasks to confirm mastery and monitor progress, sustaining an improvement cycle explicitly designed to drive year-over-year gains in ELA Median Growth Percentiles.

CSP grant funding will support implementation at scale for grades 6–9 by enabling continued professional development with Success Academy, allowing additional cohorts of teachers and administrators to observe high-performing ELA instruction and refine the Success Academy-aligned comprehension, discussion, and writing routines used at Monticello Academy West Point. Grant funding will also provide the texts and instructional materials needed to implement content-rich reading, writing, and literacy block instruction consistently across grades 6–9, strengthening the curriculum resources that support annual improvements in ELA median growth.

### Growth Plan and Enrollment Strategy

Monticello Academy West Point will implement its expansion over two grant implementation years (2026–27 and 2027–28), reaching full enrollment by the end of the grant period and then sustaining enrollment through ongoing recruitment and retention practices. The growth plan expands grade-level capacity in grades 6–9 at the West Point campus and is designed to scale a proven junior high model while meeting demonstrated community demand.

The school's enrollment projections are structured by grade and year. In 2026–27, the school will add new capacity in grade 6 and grade 7. Grade 6 will expand to a target enrollment of 78 students, representing 26 additional seats beyond the school's current capacity of 52 seats in grade 6. Grade 7 will open with 52 new seats. In 2027–28, the school will complete the planned junior high expansion by increasing grade 7 to 78 students (adding 26 seats) and opening grades 8 and 9 at full capacity, with 78 seats in each grade. The school's instructional staffing and scheduling assumptions are built on a class size of 26 students. In addition to adding new seats, the school will actively backfill open seats as they occur, with the expectation that expanded junior high offerings and increased program visibility will attract new families to the campus.

| Year | Phase | Growth |
|---|---|---|
| **2025–26** | Planning | No CSP-supported growth |
| **2026–27** | Implementation Year 1 | 6th Grade: +26 seats<br>7th Grade: +52 seats |

| | | |
|---|---|---|
| **2027–28** | Implementation Year 2 | 7th Grade: +26 seats (78 total)<br>8th Grade: +78 seats<br>9th Grade: +78 seats |

To meet these enrollment targets, Monticello Academy West Point will implement a multi-channel recruitment strategy that emphasizes both broad awareness and targeted outreach to communities where families may face barriers to accessing high-quality options. Core recruitment channels include word-of-mouth referrals from current families, strengthened digital search advertising, expanded social media outreach, increased direct mail outreach, and a larger presence at community events. The school will continue and expand its community engagement calendar, including participation in seasonal and local events (e.g., summer, fall, and winter community activities), with specific outreach focus in Clearfield, Sunset, and Hooper consistent with the project's equity and access goals.

The school will also leverage community partnerships to extend awareness and deepen trust. Existing relationships with local daycares provide a pipeline of community connections, and the school will continue to build visibility through partnerships with youth sports organizations. As the junior high program expands, the launch of interscholastic sports will further strengthen the school's presence in the community and create additional opportunities for student recruitment and family engagement.

Transportation is a core access strategy that supports enrollment growth. The school plans to operate two bus routes—one serving Clearfield/Sunset and one serving Hooper—to reduce transportation barriers for families. The school will use high-capacity Type D buses (approximately 80+ passengers) to support ridership needs as enrollment grows. These transportation supports are intended to increase access to the West Point campus for families who may not otherwise be able to participate due to distance or transportation limitations.

Finally, the growth plan is supported by facility readiness and capacity expansion. The project includes furnishing and activating additional space currently under construction, which will add 15 classrooms and a library. This additional instructional space will allow the school to expand enrollment on the planned timeline while maintaining program quality, ensuring that staffing, facilities, and operational supports scale in step with student growth.

### Professional Development Plan

Monticello Academy West Point's professional development plan is designed to ensure that administrators and teachers consistently understand and implement the school's instructional model with fidelity as the school expands grades 6–9. The heart of the plan is an embedded system of frequent observation, coaching, and actionable feedback tied to clear instructional expectations. School leaders conduct regular classroom observations using a platform with rubrics aligned to specific instructional strategies, enabling efficient evidence collection and rapid feedback cycles. The expectation is that every teacher receives targeted feedback at least once every two weeks, with more frequent coaching for teachers who need additional support. This coaching structure ensures that professional learning is continuous, job-embedded, and directly connected to daily instruction.

The school also provides structured training prior to implementation. Teachers participate in two full weeks of professional development before the school year begins to develop a shared understanding of the curriculum, instructional routines, and PLC structures. This pre-service PD includes deep dives into the school's interdisciplinary curriculum and training in the systems that drive continuous improvement.

Key elements of the school's professional development system include:

- Curriculum and model training: Training in Core Knowledge and Singapore Math scope, sequence, and instructional routines, including interdisciplinary planning across content areas.
- PLC and data routines: Training in PLC structures, data meeting protocols, and expectations for analyzing student work and converting insights into reteach and acceleration plans.
- Instructional technique development: Training in Teach Like a Champion strategies, supported by practice, feedback, and tools that reinforce consistent execution of high-leverage moves.
- MTSS implementation: Training in tiered supports, including literacy interventions such as REWARDS for students with persistent decoding needs and enrichment tools such as Junior Great Books to strengthen text-based analysis and discussion.

To strengthen long-term instructional capacity, the professional development plan includes targeted external learning aligned to the school's core curricular approaches and ongoing collaboration with high-performing schools. Through continued engagement with Success Academy, including visits to high-performing campuses and observation of effective instruction and coaching systems, Monticello Academy educators bring back specific practices to refine implementation at West Point. Teachers will also participate in multi-day Singapore Math workshops to deepen both content knowledge and pedagogy, including the underlying philosophy and methods that drive strong implementation. In addition, the school will send teachers to the Core Knowledge National Conference in summer 2027 to deepen understanding of the curriculum's design and the knowledge-building approach that supports literacy growth across subjects. CSP grant funding will support this external professional learning by covering travel and registration costs for these training opportunities, helping ensure consistent implementation as the school scales grades 6–9.

Throughout the year, professional learning is sustained through weekly staff meetings, scheduled professional development days, and ongoing PLC cycles. Professional development is guided by the school's executive and campus leadership team, which provides strategic oversight, coaching, and fidelity monitoring. Together, these components create a coherent professional development system—pre-service training, sustained coaching, and ongoing collaborative learning—designed to build and maintain strong instructional practice and support annual improvements in student outcomes through the end of the grant period.

## Feasibility & Sustainability

Monticello Academy West Point's expansion plan is financially and operationally feasible and designed to remain sustainable beyond the CSP grant period. Facility expansion is already underway and is tracking well; construction is on schedule to be completed in July 2026, allowing sufficient time to furnish and equip classrooms and open doors in August 2026 for the additional students served through the grant-supported expansion.

The facility project will provide the capacity needed to support 260 additional seats across grades 6–9 by the end of the 2027–28 school year. The staffing plan is phased and aligned to the grade-by-grade growth timeline. Because the campus can absorb a portion of the initial increase with existing staffing and structures, Monticello anticipates hiring two additional teachers for the 2026–27 school year to support the first year of expanded enrollment. The school has an active pipeline of high-potential candidates, including the planned transfer of an existing high-performing teacher from another Monticello campus.

In 2027–28, staffing increases more substantially to match the full junior high rollout. Monticello anticipates hiring eight additional teachers to staff expanded seventh and eighth grade sections and to provide the additional specialty/specials coverage required by a larger 6–9 program. These hires are built into the school's budget model and staffing plan and are considered operationally and financially manageable as enrollment increases.

Financial sustainability is supported by conservative planning and robust oversight. The school's business manager, executive director, and board of trustees provide ongoing monitoring, alongside required state auditing and financial reporting. Importantly, the school's financial sustainability models indicate that even in a downside scenario where enrollment growth does not materialize as planned, Monticello Academy West Point can still meet its financial obligations. While such a scenario would require tighter management of discretionary line items, the school remains financially sustainable, and the grant-funded investment is structured to support a responsible, phased implementation.

Monticello has a track record of successful growth, including the launch and scaling of the West Point campus, and uses lessons learned from prior expansion to guide staffing, facility readiness, and financial planning for this project. With construction underway, a phased hiring plan aligned to enrollment growth, and financial models that remain viable under conservative enrollment scenarios, Monticello Academy West Point is positioned to implement the expansion on schedule and sustain it beyond the CSP grant period.

## 2B. Project Goals

### SMART Goals

#### *Goal 1 — ELA Growth (RISE MGP) for Educationally Disadvantaged Students*

By the end of Implementation Year 2 (Spring 2028), educationally disadvantaged students (Economically Disadvantaged, Limited English Proficiency, and Students with Disabilities) at Monticello Academy West Point will increase RISE Median Growth Percentile (MGP) in ELA from the 2023–2025 three-year average by five MGP points, as reported on the Utah state growth report (RISE MGP).

Educationally Disadvantaged Subgroup
Baseline (Campus 3-Year Avg MGP ELA) → Spring 2028 Goal (Baseline + 5)

Economically Disadvantaged Students: 58.0 → 63.0
Limited English Proficiency Students: 66.2 → 71.2
Students with Disabilities: 43.7 → 48.7

### *Goal 2 — Math Growth (RISE MGP) for Educationally Disadvantaged Students*

By the end of Implementation Year 2 (Spring 2028), educationally disadvantaged students (Economically Disadvantaged, Limited English Proficiency, and Students with Disabilities) at Monticello Academy West Point will increase RISE Median Growth Percentile (MGP) in Math from the 2023–2025 three-year average by five MGP points, as reported on the Utah state growth report (RISE MGP).

Educationally Disadvantaged Subgroup
Baseline (Campus 3-Year Avg MGP Math) → Spring 2028 Goal (Baseline + 5)

Economically Disadvantaged Students: 61.0 → 66.0
Limited English Proficiency Students: 55.5 → 60.5
Students with Disabilities: 51.7 → 56.7

### *Goal 3 — Equitable Enrollment Growth and Access*

By the end of the 2027–28 school year, Monticello Academy West Point will enroll and sustain 260 additional seats attributable to grant-funded expansion. As an equity indicator of expanded access, enrollment of students residing in Clearfield, Sunset, and Hooper will increase from 102 to 204 students.

Benchmarks:

- 26 6th grade and 52 7th grade enrollments in 2026–27
- 26 additional 7th grade enrollments, 78 8th grade, and 78 9th grade enrollments in 2027–28

### *Goal 4 — Academic Program and Facility Readiness*

By the end of the 2027–28 school year, Monticello Academy West Point will fully implement and sustain the expanded academic program by ensuring that the additional instructional space required for the expansion is activated and ready for use, and that 100% of grant-funded curriculum, textbooks, instructional materials, supplies, and FF&E required to serve the additional students in the school's interdisciplinary curriculum are purchased, inventoried, and available for instructional use, with documentation sufficient for grant monitoring and reimbursement.

## Goal Tracking and Progress Monitoring

Monticello Academy West Point will implement a structured goal tracking and progress monitoring system to ensure that project activities, expenditures, and outcomes remain aligned throughout the grant period. Each SMART goal will be assigned to a designated goal lead and a cross-functional goal team responsible for implementation and results. Each team will hold a standing monthly check-in meeting (approximately 30–60 minutes) to review progress toward the goal's mid-project benchmark and end-of-grant target, confirm that grant-funded purchases and activities are occurring on schedule, and document decisions and follow-up actions. As a first deliverable, each goal team will develop and maintain a goal-specific monitoring plan that sequences major objectives and associated expenditures across the grant timeline (May 2026 through Spring 2028), including professional development planning and implementation milestones, and updates that plan based on emerging needs.

The monthly meeting framework will be consistent across all goals and will include:

- Review of key performance indicators and relevant data sources (including disaggregated subgroup data for academic goals and enrollment/access metrics for Goal 3)
- Review of implementation evidence and compliance documentation tied to grant expenditures (e.g., purchase orders, receiving records, inventory logs, training registrations, and travel documentation)
- Confirmation of upcoming milestones and readiness items (e.g., materials in place before implementation, professional development scheduled in advance of rollout, transportation/facility readiness checkpoints)
- Corrective action planning when leading indicators show the team is off track to meet benchmarks or when implementation risks emerge
- In addition to the teams listed below, the executive director as CSP Lead will attend all possible monthly goal check-ins

### Goal 1 — ELA Growth (RISE MGP)

Team Lead: Assistant Director

Monthly Goal Check-In (30–60 minutes)

- Campus Director/Assistant Director(s)
- ELA Department Chair
- SPED Lead (SWD)
- EL Coordinator/Lead (LEP)
- Literacy/RTI lead

Mid-Project Benchmark (Spring 2027)

- Increase ELA RISE MGP for ED/LEP/SWD by +2.5 points from the 2023–2025 three-year average

Example data points at monthly meetings:

- Literacy block implementation and progress monitoring (by subgroup)
- PLC reteach cycles and intervention adjustments

- Coaching/observation trends on high-leverage ELA instructional practices
- ELA materials procurement/inventory status (as applicable)
- Formative and summative assessment results

Corrective action trigger

- If subgroup indicators show students are off track to meet the Spring 2027 benchmark, the team revises groupings, reteach plans, and coaching focus and documents adjustments for follow-up at the next monthly check-in

### Goal 2 — Math Growth (RISE MGP)

Team Lead: Campus Director

Monthly Goal Check-In (30–60 minutes)

- Campus Director/Assistant Director(s)
- Math Department Chair
- SPED Teacher
- EL Coordinator/Lead

Mid-Project Benchmark (Spring 2027)

- Increase Math RISE MGP for ED/LEP/SWD by +2.5 points from the 2023–2025 three-year average

Example data points at monthly meetings:

- Singapore Math implementation fidelity and pacing
- Checks for understanding/common assessment results (by subgroup); i.e., formative and summative assessment data
- PLC outputs: reteach/acceleration plans and follow-through
- Small-group supports and intervention effectiveness
- Coaching/observation trends in math instruction
- Math materials/manipulatives readiness (as applicable)

Corrective action trigger

- If interim results indicate subgroups are below trajectory, the team adjusts instructional pacing, reteach plans, and intervention supports and increases coaching cycles as needed

### Goal 3 — Equitable Enrollment Growth and Access

Team Lead: Marketing and Communications Director

Monthly Goal Check-In (30–60 minutes)

- Operations Director
- Marketing/Enrollment team
- Office Manager
- Transportation Lead

Mid-Project Benchmark (end of 2026–27)

- Achieve 78 new 6th and 7th grade enrollments attributable to the expansion and confirm progress toward end-of-grant seat and access targets

What the team monitors monthly

- Enrollment pipeline (applications, registrations, enrollments) and conversion trends
- Outreach execution (search/digital, social media, direct mail, community events)
- Target-municipality enrollment counts (Clearfield/Sunset/Hooper) using Primary Guardian City
- Transportation route readiness and ridership
- Documentation for marketing and transportation expenditures

Corrective action trigger

- If pipeline volume or target-municipality enrollment is below trajectory, the team revises outreach tactics, reallocates marketing effort, adjusts event strategy, and updates route/stops planning as needed

### Goal 4 — Academic Program and Facility Readiness

Team Lead: Operations Director

Monthly Goal Check-In (30–60 minutes)

- Campus Director
- Operations/Purchasing lead
- Facilities lead/owner's rep liaison
- IT lead
- Program leads as applicable (arts, science, computer science)

Mid-Project Benchmark (end of 2026–27)

- Additional instructional space is furnished and operational for Year 1 expansion, and all Year 1 grant-funded resources are purchased, inventoried, and in place for instructional use

What the team monitors monthly

- Facility activation/readiness milestones and occupancy readiness checkpoints
- Procurement status and receiving/inventory for curriculum, textbooks, supplies, and FF&E
- Classroom and specialty-space readiness checklists
- Technology deployment and functionality checks
- Documentation readiness for reimbursement and grant monitoring

Corrective action trigger

- If readiness milestones slip or procurement is behind schedule, the team adjusts purchasing timelines, escalates vendor follow-up, reallocates internal capacity, and documents corrective actions for the next check-in

## 2C. Plan for Serving Student Needs

### *Monitoring & Improving Academic Outcomes*

Monticello Academy West Point will use a multi-tiered system of supports (MTSS) to regularly monitor and improve academic outcomes for all student populations, with particular attention to students who are underserved and educationally disadvantaged. Monitoring is built into daily instruction and schoolwide systems through a consistent cycle of assessment, analysis, action, and follow-up.

Key monitoring and improvement practices include:

- Frequent checks for understanding embedded in instruction (e.g., exit tickets, short-cycle quizzes, and student work tasks)
- Common interim assessments on a recurring cycle and systematic review of results
- Disaggregated analysis of outcomes for Economically Disadvantaged students, English Learners, and Students with Disabilities to identify gaps in growth and mastery
- PLC routines that analyze student work, identify misconceptions, determine root causes, and assign reteach and acceleration actions
- Ongoing classroom observations and feedback aligned to instructional expectations to ensure consistent implementation across teachers

To ensure monitoring translates into improved outcomes, the school tracks a defined set of leading indicators and reviews them consistently in PLC cycles and coaching routines. These include interim benchmark results, writing-to-text rubric scores and text-based comprehension checks, literacy block progress monitoring (decoding/fluency/comprehension as applicable), intervention participation and response-to-intervention indicators, and attendance patterns that may affect learning. When subgroup trends indicate that students are not on track, teams implement documented reteach plans, adjust small-group supports, and increase the intensity of interventions as needed, then re-check progress in the next cycle.

As part of the grant's goal tracking framework, the school will conduct monthly goal check-ins for ELA and Math growth to review these leading indicators (including subgroup performance), verify that instructional and intervention supports are being implemented with fidelity, and document adjustments when progress is off track. As new staff are hired to support expanded grades during the grant period, the school will use a standardized onboarding sequence (pre-service training plus coaching cycles) to ensure new teachers are trained in MTSS procedures, literacy block interventions, and sheltered instruction expectations before assuming responsibility for implementation.

### *Identifying & Supporting Underserved Students*

Monticello Academy West Point uses clear processes to identify students who need additional support and to match supports to student needs. Identification begins with universal screening, review of existing records, and teacher observation, followed by targeted diagnostic measures as needed. Underserved student groups are identified through formal processes:

- English Learners: Enrollment records and required language screening (e.g., WIDA screener)
- Students with Disabilities: IDEA and Section 504 processes, including records review and evaluations as needed
- Students with reading needs: Decoding, fluency, and comprehension measures and review of student work and performance data

Supports are tiered and individualized based on identified need. In English Language Arts, students participate in a literacy block four times per week (approximately 45 minutes per session) in which all learners receive targeted reading instruction aligned to assessed needs:

- Foundational support: Systematic, phonics-based interventions aligned with the science of reading
- Secondary decoding intervention: REWARDS for students with persistent decoding challenges (multi-syllabic word fluency, morphology, advanced phonics patterns)
- On-level and advanced enrichment: Junior Great Books to strengthen close reading, interpretation, and evidence-based discussion

Students with disabilities are served primarily through an inclusion model that emphasizes access to grade-level instruction with individualized accommodations and specially designed instruction as required by the IEP. Supports in the expanded grades will include:

- Case management and routine progress monitoring of IEP goals, with service minutes and accommodations implemented as written
- Co-planning between general education teachers and special education staff (including regular planning touchpoints to align scaffolds and supports to upcoming lessons)
- Push-in services during core instruction when appropriate and targeted pull-out supports when needed for individualized instruction
- Consistent classroom accommodation routines (e.g., scaffolded directions, chunking, extended time, structured supports for writing and organization) implemented and monitored through coaching and walkthroughs

English Learners receive sheltered instruction and language supports embedded in daily instruction, aligned to the SIOP framework. Teachers use clear language objectives, explicit vocabulary instruction, visual supports, structured academic discourse routines, and writing scaffolds (e.g., sentence frames and modeled responses) so that English Learners can access grade-level content while developing academic language. EL progress is monitored through required language proficiency measures and ongoing classroom evidence (including writing samples, oral language participation, and comprehension checks), and supports are adjusted through MTSS and PLC cycles.

Economically disadvantaged students are supported through schoolwide systems that prioritize equitable access to instructional materials and program participation and reduce barriers to learning and engagement. This includes ensuring students have the necessary curriculum materials and providing proactive academic supports through MTSS structures when data indicates the need for additional intervention.

To ensure supports remain responsive, the school uses a clear monitoring and escalation process:

- Intervention placement is reviewed on a recurring schedule using progress monitoring data
- Teams adjust intensity, grouping, and instructional strategies when students are not responding to supports
- General education teachers initiate recommendations for additional screening, RTI supports, or evaluation when warranted, with guidance from the RTI coordinator and special education/EL staff
- Decisions and follow-up actions are documented and revisited in subsequent cycles

### *Equitable & Inclusive Practices*

Equitable and inclusive practices are embedded in both instructional design and implementation systems so that access to rigorous learning is consistent across classrooms. Curriculum choices support diverse learners. Core Knowledge is a content-rich approach that systematically builds background knowledge and academic vocabulary, reducing reliance on prior opportunity and supporting long-term comprehension across subjects. Singapore Math uses clear representations and consistent instructional routines that support conceptual understanding and mathematical language development, which is beneficial for students developing academic English. In ELA, high-leverage comprehension routines and writing-to-text tasks are explicitly taught and practiced so that all students have structured pathways to participate in rigorous instruction.

The school institutionalizes inclusive classroom practice through training, coaching, and implementation checks. Teachers receive ongoing development in high-leverage instructional techniques (including Teach Like a Champion routines), sheltered instruction aligned to SIOP, and practices that support culturally responsive and inclusive participation. Walkthroughs and observation cycles verify that inclusive routines are consistently in place, including:

- Structured discussion protocols that promote equitable participation and student voice
- Clear teacher modeling and explicit strategy instruction
- Frequent checks for understanding and responsive reteaching based on student evidence
- Scaffolds that allow students to express complex thinking while developing academic English and accessing grade-level texts

Finally, the school prioritizes equitable family engagement and language access. Communication systems such as text-based messaging help reach families with varying schedules and technology access, and translation and multilingual supports are provided as needed for key communications and family meetings. Language access needs are identified through enrollment home language information and interpreter/translation requests, and the school prioritizes translation of high-frequency communications and interpretation for meetings and events. As the school expands, transportation planning and community outreach will further reduce access barriers for families who may not otherwise be able to participate. Together, these academic, operational, and family engagement practices ensure that Monticello Academy West Point identifies student needs early, provides targeted supports, and sustains inclusive practices that improve outcomes for all student populations.

## 2D. Family and Community Involvement

### *Family & Community Engagement*

Monticello Academy West Point builds long-term partnerships with families through regular, mission-aligned engagement focused on student learning and school culture. Annual Open House events highlight student learning across the Core Knowledge curriculum and provide families a direct window into the school's content-rich, interdisciplinary approach. An active Parent Organization hosts multiple schoolwide events—including a fall carnival, jog-a-thon, and seasonal family activities—that create welcoming spaces for families to connect to the school community. The school maintains an open-door culture that invites families to observe classrooms, strengthening transparency and trust. While families are encouraged to contribute volunteer service (with a 40-hour annual goal), volunteerism is not required, and the school offers flexible options that allow families with limited time, transportation, or nontraditional work schedules to participate.

To ensure family engagement is inclusive and sustainable, the school uses multiple communication channels and intentionally reduces barriers to participation:

- Ongoing, text-based communication options for families who prefer mobile access and flexible timing
- Events offered at varied times (including evenings and weekends)
- Translation and interpretation supports for major events and key communications, with language needs identified through enrollment home language information and interpreter/translation requests

### *Opportunities for Family & Community Decision-Making*

Family voice is built into governance and continuous improvement through structured opportunities for input and shared decision-making. The Parent Council directs spending of Land Trust funds, coordinates volunteer efforts, and provides input on school programming and family engagement priorities. A parent representative also serves on the governing board, ensuring parent perspectives are represented while maintaining clear governance roles and respecting school leadership's responsibility for day-to-day operations.

The school uses a consistent feedback-to-action cycle to ensure stakeholder input results in meaningful changes. This includes beginning-, middle-, and end-of-year surveys of parents (and, as applicable, students and staff), along with ongoing feedback channels through the campus administration team. Survey results are reviewed with school leadership and the Parent Council to identify priorities, refine schoolwide events and communication practices, and improve family supports. As part of the junior high expansion, the school will also use targeted listening and outreach efforts in the communities emphasized in the enrollment-access goal (including Clearfield, Sunset, and Hooper) to ensure outreach, transportation planning, and program messaging reflect community needs.

### *Pre-Operational Engagement & Stakeholder Feedback*

Monticello Academy West Point maintains year-round community presence and uses stakeholder feedback to guide expansion planning. The school participates in municipal parades, staffs booths at community events, and conducts ongoing recruitment activities to build awareness among families unfamiliar with charter options. Feedback collected through parent surveys and direct family input informs decisions about programming and grade-level expansion priorities, including the development of a more complete 6–9 junior high pathway at the West Point campus. During the grant period, pre-operational engagement for each expansion phase will include public-facing information sessions and school tours, with opportunities for families to ask questions, provide input, and receive enrollment and transportation information.

### *Inclusive Recruitment, Admissions, & Retention Strategies*

Monticello Academy West Point's recruitment and retention approach prioritizes equitable access and long-term family engagement. Recruitment efforts use multi-channel outreach to reach families where they are, including word-of-mouth outreach, improved digital search advertising, expanded social media presence, direct mail, and increased participation in community events. In alignment with the school's equitable enrollment goal, outreach will include focused engagement in Clearfield, Sunset, and Hooper, supported by transportation planning intended to reduce access barriers.

Retention is addressed through proactive family communication, strong school-to-home partnerships, and early response to barriers that can cause students to disengage. Key retention practices include:

- Frequent, accessible family communication and clear expectations for academic progress and supports
- Opportunities for parents to observe classrooms and engage with teachers and administrators
- Regular family satisfaction surveys and follow-up actions when concerns are identified
- Transition supports for students moving into junior high grades, including orientations and family information sessions
- Transportation supports (as applicable) to reduce barriers that can affect consistent attendance and persistence

Together, these strategies provide multiple avenues for families—including underserved families—to engage, provide input, and remain connected to the school as the junior high program expands.

## 2E. Community Support and Demand

### *Projected Enrollment & Evidence of Demand*

Monticello Academy West Point's expansion plan is based on a clear, grade-by-grade growth model over the two implementation years (2026–27 and 2027–28), resulting in 260 additional seats by the end of the grant period. In 2026–27, grade 6 will expand to a total of 78 students (26 additional seats beyond current grade 6 capacity) and grade 7 will open with 52 new seats. In 2027–28, grade 7 will expand to 78 students (an additional 26 seats), and grades 8 and 9 will open with 78 seats each. The school's projections also assume ongoing backfilling of available seats as they occur, supported by a multi-channel recruitment strategy and reduced transportation barriers as the junior high program becomes fully available on the West Point campus.

Demand indicators support the feasibility of this growth plan. As of March 4, Monticello Academy West Point has received 168 new applications for the upcoming school year, and the school maintains waitlists in multiple grade levels, indicating demand that exceeds current capacity. In addition, the campus has experienced space constraints that have required converting shared spaces into classrooms to accommodate current enrollment, and facility expansion is underway to restore and expand appropriate instructional space. The school will continue to track direct demand indicators throughout the enrollment cycle (applications, registrations, waitlists, and enrollments) and adjust outreach strategies as needed to meet grade-level enrollment targets.

### *Alignment with Community Needs*

This expansion responds to local student and family needs by increasing access to a high-quality, college-preparatory program that is already serving a substantial share of educationally disadvantaged students in the immediate community. Data collected last year indicates a need in the community among educationally disadvantaged students for the high-quality programming that Monticello Academy provides. Even when drawing from the same local geographic area, Monticello Academy West Point serves higher proportions of economically disadvantaged students and English learners than nearby district elementary schools located within one mile of the campus, indicating both community need and family demand for a program designed to serve diverse learning needs.

| | Monticello Academy West Point | Lakeside Elementary | West Point Elementary |
|---|---|---|---|
| Distance from Monticello Academy West Point (miles) | 0 | 0.6 | 0.7 |
| Economically Disadvantaged | 30% | 17% | 11% |
| Students with Disabilities | 21% | 23% | 18% |
| English Language Learners | 11% | 2% | 2% |
| Homeless | <1% | 3% | <1% |
| Caucasian | 63% | 82% | 83% |
| Hispanic | 23% | 11% | 12% |
| Multi-Racial | 11% | 4% | 2% |
| Military-Connected | 11% | 4% | 2% |

The school's plans also reflect local needs by utilizing community assets and ensuring access for families. Monticello Academy West Point maintains community presence through local events, family engagement structures, and relationships with community organizations (including youth sports), which support recruitment and ongoing family connection. To reduce access barriers that can prevent families from participating in school choice, the school will implement transportation supports aligned to the expansion plan, strengthening access for families who may otherwise be limited by distance or transportation constraints. Together, these elements provide well-supported enrollment projections, clear evidence of demand, and a plan that reflects local needs and improves access for local students and families.

In addition to direct demand indicators (applications and waitlists), regional housing growth in Davis County supports the feasibility of the school's enrollment projections over the grant period. The West Point campus is located near key community assets (including City Hall and the Fire Department), supporting ongoing community partnerships and family engagement. To reduce access barriers, the school will implement transportation supports aligned to the expansion plan, including routes serving Clearfield/Sunset and Hooper (details provided in the Transportation Plan section). The school also maintains partnerships with local daycare providers that support working families in the elementary grades and strengthen school-community connections.

The Director of Operations serves as the point person for community partnerships and coordinates relationships that support student and family needs. This includes partnerships with local providers, including agricultural providers, to support healthy breakfast and lunch options for students.

## 2F. Transportation Plan

### *Reliable & Equitable Transportation Plan*

Monticello Academy West Point recognizes transportation as a critical access strategy for ensuring that family transportation barriers do not limit enrollment or participation in a high-quality educational program. If awarded CSP funding, the school will acquire two full-size, ADA-compliant Type D school buses with high passenger capacity. Transportation will be provided at no cost to families and will operate with stop-based service for both morning and afternoon routes.

The school will staff and manage transportation through a dedicated Transportation Lead position initially supported by the CSP grant. The Transportation Lead will be responsible for transportation operations, including route planning, driver hiring and scheduling, training, safety procedures, and documentation. In addition, the school will leverage technical guidance and ongoing support from a community partner with transportation expertise: the spouse of a governing board member serves as a transportation manager within a local school district and has already provided technical guidance that will continue during implementation.

Ridership will be assigned through a structured transportation request process that collects student address, grade level, and access barriers. Seats will be prioritized for students with the greatest transportation need, including students residing along the approved route corridors where family transportation barriers are most likely to limit access. If demand exceeds capacity, the school will maintain a transportation waitlist and will refine stops and routing to maximize service coverage while maintaining safe and reasonable ride times.

Accessibility for students with disabilities will be addressed through established school systems. Transportation needs requiring ADA accessibility will be identified through IEP and Section 504 processes. The Special Education Director and the 504 Coordinator will take the lead on identifying students whose plans indicate transportation-related needs and will coordinate with the Transportation Lead to ensure required accommodations are implemented. This process ensures that students with physical needs are not only served by ADA-compliant vehicles, but also prioritized appropriately through documented planning and ongoing review.

Safety, reliability, and compliance will be managed through the Transportation Lead and school leadership. This includes required driver qualifications and training, safe stop selection, established pick-up and drop-off procedures, and consistent documentation. The school will implement routine operational safeguards, including daily pre-trip checks, documented maintenance scheduling, ridership rosters, and clear emergency procedures. Ongoing operating costs—including driver compensation, fuel, maintenance, and insurance—will be covered through the school's general operating budget to ensure sustainability beyond the grant period.

### *Accessibility & Location Considerations*

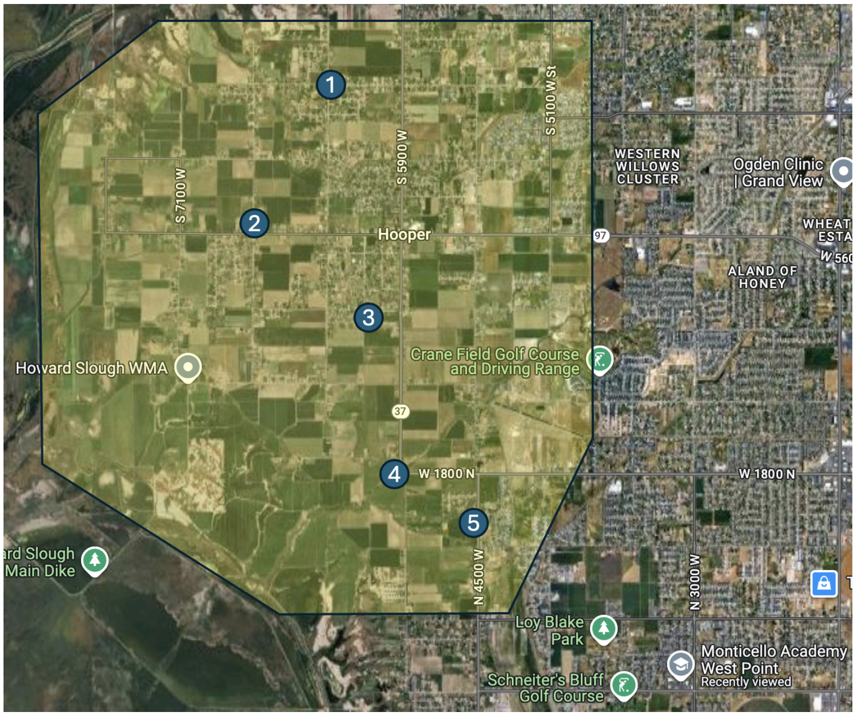
The West Point campus is centrally located near civic infrastructure; however, it is not directly served by public transportation, and walkability is limited for many families who reside outside the immediate neighborhood. As a commuter charter school, Monticello Academy West Point serves families from multiple communities, including areas where distance, work schedules, and vehicle access can create significant barriers to consistent attendance and school choice. The planned bus system is designed to ensure that the school's location does not become a barrier to equitable access for students who cannot reasonably walk or rely on public transit.

The school will operate two routes aligned to enrollment need and access barriers:

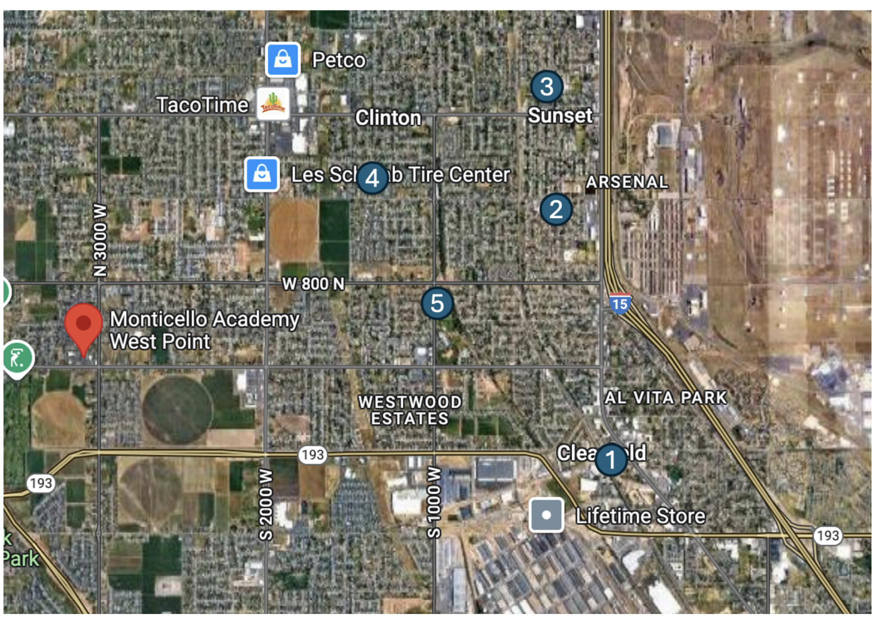
- Hooper Route: A stop-based route serving Hooper and surrounding rural areas where families may face longer commute distances and limited transportation options.
- Clearfield/Sunset Route: A stop-based route serving Clearfield and Sunset, including higher-density housing areas where transportation barriers can limit access to school options.

These routes are designed to improve access for students who would otherwise face prohibitive commute challenges and to support the school's broader enrollment and community access strategy. Route locations and stops will be reviewed periodically based on ridership, safety considerations, and changing community needs, with adjustments documented through the school's transportation planning process.

## *Rural Bus Route*




## *High Density Bus Route*



## 3. Lottery Process

Monticello Academy West Point's admissions and lottery process complies with all applicable federal and state requirements, including Utah Code §53A-1a-506.5 and federal CSP regulations. Admission is open to all Utah students and is not based on race, religion, gender, ability, national origin, English proficiency, or socioeconomic status. The school does not charge tuition. Enrollment policies and timelines are publicly posted to ensure transparency.

### Community Notification and Recruitment Timeline

Monticello Academy conducts a new lottery each enrollment year when applications exceed available seats in any grade level. The school's annual timeline is consistent year-to-year and includes the following steps:

- Open enrollment opens the Monday before Thanksgiving.
- Applications for the Round 1 lottery are accepted from that date through December and January.
- The lottery is conducted on February 1, or if February 1 falls on a weekend, on the first Monday in February.
- Applications (Round 2) and enrollment continue on a rolling basis after the lottery through the beginning of the school year until seats are filled.

The school advertises open enrollment and the lottery timeline through the school website, the SchoolMint platform, and through direct communication to families and community outreach channels. Notifications to families are provided through SchoolMint via email and text message, translated into the family's preferred language.

### Permitted Lottery Exemptions / Enrollment Preferences

When a lottery is required, the school applies permitted preferences in accordance with law. Preference categories include:

- Siblings of currently enrolled students
- Children of school employees (full-time and part-time), capped at no more than 25% of enrollment (the school has not historically approached this threshold)
- Students articulating from another Monticello Academy campus
- Children and grandchildren of founders (if permitted under the RFA and applicable law; the school will remove the grandparent provision if required)

### Lottery Implementation (Random Selection Method)

If applications exceed available seats in a grade, the school conducts a grade-level lottery using a statistically random method through SchoolMint. Each non-preference applicant is assigned a random number, applicants are ranked by that random number, and seats are offered in rank order until all available seats are filled. This process ensures that all non-preference applicants have an equal chance of selection.

### Notification, Post-Lottery Enrollment, and Waitlist Management

Lottery results are communicated automatically through the SchoolMint Enroll platform via email and text message (translated into the family's preferred language). Waitlists are maintained separately by grade.

- Initial offers (immediately following the lottery): Families offered seats in the initial post-lottery round have two weeks to accept the seat, allowing time to schedule a tour if desired. If a family does not accept within the two-week window, the offer is forfeited and the seat is offered to the next student on the grade-level waitlist.

- Subsequent offers (rolling enrollment): After the initial post-lottery round, seats that become available are offered to students on the grade-level waitlist in order. Families have three days to accept the seat. If the offer is not accepted, the seat is offered to the next student on the waitlist.

- Late applications: After the lottery is conducted, applicants who apply later are added to the end of the applicable grade-level waitlist on a first-come, first-served basis (behind students included in the lottery drawing).

- Rolling enrollment: Enrollment continues through the beginning of the school year until all seats are filled.

This process ensures a transparent, fair, and efficient lottery and enrollment system, including clear recruitment and notification procedures, permitted enrollment preferences, and consistent grade-level waitlist management.

## 4. Governance, Autonomy, and Project Administration

### *Board Member Information & Roles*

Monticello Academy West Point is governed by a mission-aligned Board of Trustees with expertise in education leadership, public service, STEM and industry, finance, philanthropy, and community engagement. Board oversight is structured through defined officer roles and standing committee work to ensure strong financial controls, timely project execution, and accountability for student outcomes.

The Board's oversight structure includes:

- Audit Committee (required under Utah law): A standing committee composed of board members and supported by an external financial expert/auditor. The Audit Committee directs audit priorities (including identified "pain points" and risk areas) and oversees a basic internal audit plan implemented through contracted audit expertise as needed.

- Budget review cadence: The Board receives regular budget updates and reviews the full budget at least every other month, with additional review and approvals as needed for CSP implementation and major procurements.

- Ad hoc committees as needed: For example, the Board has convened an ad hoc uniform committee (led by Emile Gibson and Andrea Gonzalez) to evaluate and revise uniform policy.

Conflict of interest safeguards are in place and actively managed. Two trustees, Joel Coleman and Kim Coleman, are husband and wife and founding parents. Both adhere to the school's conflict-of-interest policy, including disclosure and recusal from any discussion or vote in which a conflict or perceived conflict could arise.

### *Project Management and Support Team*

CSP implementation will be managed internally by Monticello Academy leadership. Monticello Academy does not contract with an ESP or CMO and retains full administrative control over all academic, operational, and financial decisions related to the project.

Roles and responsibilities for project administration are clearly defined:

- Executive Director: Serves as Project Manager and is accountable for delivery against project scope, timeline, and outcomes.
- Business Manager: Leads budget tracking, allowability checks, reimbursement documentation, and grant compliance reporting.
- Director of Operations: Oversees procurement, vendor coordination, facilities readiness, and inventory/asset controls.
- Campus Director: Leads day-to-day implementation at the school level, including coordination with instructional staff and site-based execution of project activities.

The project management team will use the goal-based progress monitoring structure described in the Project Goals section. Goal teams meet monthly (30–60 minutes) to track progress on activities, expenditures, and outcomes tied to each SMART goal, document decisions, and implement corrective actions when needed. The Executive Director and Business Manager provide routine updates to the Board, including budget status and milestone progress, to ensure the project remains on schedule and within budget.

### *Administrative Relationship & Autonomy*

Monticello Academy is authorized by the Utah State Charter School Board and operates with substantial autonomy over academic programming, staffing, budgeting, and scheduling. This autonomy allows Monticello Academy to implement its instructional model with fidelity and to respond quickly to student and family needs without unnecessary delays. Examples of how autonomy supports effective implementation include curriculum selection and refinement (e.g., Core Knowledge and Singapore Math), rapid adoption of high-leverage instructional practices based on evidence and observed best practices, and operational improvements that directly support student needs (including continuous improvements to nutrition services to provide fresh, locally supported meals).

The school remains accountable to the authorizer through required reporting, monitoring, audits, and performance expectations, while retaining the operational control necessary to execute the CSP expansion project effectively.

### *Quality Controls & Accountability Measures*

Monticello Academy maintains high standards of accountability through integrated academic, financial, and operational oversight systems designed to ensure the CSP project is implemented with fidelity, on schedule, and within budget.

- **Academic accountability**: The school monitors student achievement and growth using state measures (RISE) and locally adopted interim measures, with subgroup performance reviewed through PLC cycles and reported to the Board on a regular cadence. The four CSP SMART goals are embedded in the school's improvement planning framework and tracked through the monthly goal-team check-ins described in the Project Goals section, with corrective actions documented when progress is off track.
- **Financial audits and internal audit oversight**: The school undergoes annual independent financial audits, and any findings are addressed through corrective action plans and follow-up oversight. In addition, the Board's Audit Committee directs internal audit priorities and reviews risk areas (e.g., reconciliations, grant accounting, compliance documentation) using external financial expertise as needed.
- **Operational oversight**: The school conducts periodic operational reviews of staffing, instructional implementation, compliance benchmarks, and facilities readiness. Instructional quality is monitored through regular coaching and observation cycles aligned to the school's instructional rubric (lesson design, student thinking, feedback, and sheltered instruction), ensuring consistent implementation across classrooms.
- **Internal controls and procurement compliance**: The school maintains robust financial controls, including separation of duties, purchase approval thresholds, documented procurement procedures, inventory/asset tracking, and routine financial reporting. CSP-funded expenditures are documented to support allowability, reimbursement, and audit readiness, and to prevent duplication of funding.

These systems ensure Monticello Academy remains accountable to its authorizer and stakeholders while sustaining high-quality implementation and continuous improvement throughout the junior high expansion.

## 5. Financial Management

### Comprehensive Budget Narrative

Monticello Academy West Point's CSP Project Budget and Budget Narrative provide a complete, line-item justification for all expenditures, including personnel, travel, equipment, supplies, contracted services, and facilities-related costs. Each line item includes unit assumptions and timing and is aligned to project activities and the four SMART goals to support allowability, reasonableness, and audit readiness.

### Planning vs. Implementation Phases

The budget clearly differentiates planning and implementation costs consistent with CSP guidance. Planning-phase expenditures prioritize pre-opening readiness (e.g., procurement lead times, launch preparation, and systems needed to execute enrollment and program implementation). Implementation-phase expenditures reflect the staged opening of new seats and the resources required to sustain the expanded grades.

### Personnel Costs (Phased CSP Coverage Model)

Personnel expenditures are limited to three project-critical roles and structured as a phased coverage model to accelerate launch while transitioning ongoing responsibility to the school as enrollment-driven revenue scales. During the planning period, CSP covers 100% of the costs incurred during the initial three-month planning window (equivalent to 25% of annual compensation). During implementation, CSP support steps down to 66% in Year 1 and 33% in Year 2.

CSP-funded personnel costs are phased as follows:

- Junior High Director (annual comp $110,000): Planning (3 months, 100% of cost) $27,500; Year 1 (66%) $72,600; Year 2 (33%) $36,300; CSP total $136,400
- Marketing & Communications Director (annual comp $85,000): Planning (3 months, 100% of cost) $21,250; Year 1 (66%) $56,100; Year 2 (33%) $28,050; CSP total $105,400
- Transportation Lead (annual comp $75,000): Planning (3 months, 100% of cost) $18,750; Year 1 (66%) $49,500; Year 2 (33%) $24,750; CSP total $93,000
  Total CSP personnel = $334,800.

### Facilities / Debt Service (Phased CSP Bond Coverage Schedule)

Facilities-related costs are structured as phased CSP support to reduce early implementation cash-flow pressure while new seats ramp up, with CSP coverage declining over time as the school assumes full ongoing responsibility.

Final CSP Bond Coverage Schedule:

- 10/15/2026: Total payment $189,375; CSP 60% ($113,625)
- 4/15/2027: Total payment $189,375; CSP 50% ($94,688)
- 10/15/2027: Total payment $264,375; CSP 40% ($105,750)
- 4/15/2028: Total payment $264,375; CSP 30% ($79,313)
  Total CSP allocation for P&I = $393,376.

### Accountability for Funds

Monticello Academy will manage CSP funds using established internal controls, including separation of duties, documented procurement procedures, inventory/asset tracking, budget-to-actual variance monitoring, and annual independent audits with board audit oversight. The school has prior experience administering federal funds and complying with associated requirements, including Single Audit procedures, and will apply these established documentation and grant accounting practices to CSP implementation.

### Post-Grant Sustainability

The phased personnel and phased bond coverage schedules are designed to decrease CSP reliance over the grant period and transition costs to ongoing revenues as expansion enrollment increases. In addition, the school's financial manager developed a grant-period and three-year post-grant budget model demonstrating the school can meet its obligations even under a very conservative downside enrollment scenario. This conservative modeling supports confidence that the school can sustain the expanded program and meet financial obligations after the subgrant ends.

## 6. Competitive Preference Priorities

### *Innovative Charter Model*

Monticello Academy West Point's junior high expansion represents an innovative charter model designed to address an unmet community need: a rigorous, coherent 6–9 pathway that prepares students for success in high school coursework while closing achievement gaps for educationally disadvantaged students. The model is innovative not because it offers a single new program element, but because it intentionally integrates several high-leverage components into one coherent instructional system.

Key features of the model include:

- Knowledge-rich Core Knowledge Sequence that systematically builds background knowledge and academic vocabulary across subjects, strengthening reading comprehension and writing across the content areas.
- Singapore Math, a concept-based approach that develops deep mathematical reasoning through a concrete-to-representational-to-abstract progression, supported by consistent models and visual representations.
- Disciplined instructional systems, including PLC data protocols and frequent coaching and feedback cycles, to ensure teachers identify misconceptions early and respond with targeted reteach and acceleration.
- A structured literacy block that provides differentiated instruction aligned to student needs, including phonics-based interventions and REWARDS for students with decoding gaps and enrichment such as Junior Great Books for on-level and advanced readers.

A distinguishing feature of Monticello's innovation—and a meaningful driver of family demand—is the school's required, integrated approach to well-rounded programming. Unlike many secondary models where arts, music, and computer science are optional electives reaching only a subset of students, Monticello provides all students consistent access to high-quality instruction in visual art, music, computer science, and physical education as part of the core junior high experience. This design supports academic achievement by increasing student engagement, improving attendance and persistence, and reinforcing learning across domains. Students apply literacy and analytical skills through performance-based and project-based work (music performance, visual art production, and computer science projects), creating reinforcement and transfer of learning that strengthens overall academic outcomes. At

Monticello's existing junior high campus, students have demonstrated high levels of achievement in these areas (including Sterling Scholar recognitions in music and art and advanced computer science experiences such as C++ programming). While students may have fewer "menu-style" electives than a comprehensive high school, the model provides depth and continuity in high-value enrichment domains that reinforce academic growth and build strong competencies that differentiate graduates.

### *High-Quality High School Programs*

Monticello Academy West Point's expansion includes the addition of grade 9, marking the school's entry into high school credit-bearing programming in a community where high school begins in grade 10. The grade 9 program will provide rigorous, standards-aligned coursework and structured supports to ensure students enter grade 10 prepared for honors-level expectations and long-term graduation success.

The grade 9 program will include:

- Core credit-bearing courses aligned to Utah standards (e.g., English I, Secondary Math I, Integrated Science, and Geography/Civics).
- High-expectations instructional practices paired with structured support, including explicit modeling, frequent checks for understanding, writing-to-text routines, and systematic reteach/acceleration through PLC cycles.
- Student supports that strengthen the transition to high school, including academic planning routines, goal-setting, and advisory structures focused on study skills and readiness for increased academic independence.
- A well-rounded program experience (art, music, computer science, and physical education) that continues in grade 9 to promote engagement, reinforce academic learning through interdisciplinary connections, and ensure students build durable competencies alongside core academic credits.

### *Promotion of Educator and Community-Centered Models*

Monticello Academy West Point's expansion is grounded in educator-centered systems that strengthen teaching quality and community-centered practices that build durable school-family partnerships and support underserved students. The model is designed to elevate educator leadership, ensure consistent instructional quality, and create frequent, meaningful opportunities for families to engage as partners in students' education.

Educator-centered practices include:

- Distributed teacher leadership: Nearly every educator holds a leadership role (e.g., grade-level chairs, department chairs, and teacher leads for ad hoc committees), ensuring that instructional decision-making is informed by classroom expertise and shared ownership.
- Teacher-driven improvement and curriculum refinement: Teachers actively shape curriculum and instruction by using PLC analysis, professional learning, and student

work review to recommend text selections, instructional approaches, and unit-level refinements that strengthen implementation and coherence across grades.

- Embedded professional learning communities: Teachers meet weekly in PLCs to review student evidence, identify misconceptions, align instructional expectations, and plan targeted reteach and acceleration. These routines ensure continuous improvement and consistent supports for student learning.
- Job-embedded coaching and development: Teachers participate in ongoing coaching and feedback cycles aligned to clear instructional expectations, supporting consistent implementation of high-leverage practices across classrooms.

Community-centered practices include:

- Open-door family engagement: The school maintains an open-door policy that welcomes families as partners. Parents and guardians may observe classrooms and participate in school life at any time without needing an appointment, strengthening transparency, trust, and shared accountability.
- Active parent volunteerism: Volunteerism is a core feature of the school community, providing multiple pathways for families to contribute to the school's success and strengthening ongoing relationships between families and staff.
- Feedback-informed improvement: Family feedback (through direct communication and structured input opportunities) is used to inform school decisions, refine family engagement approaches, and strengthen supports that help students persist and thrive.
- Inclusive access to participation: The school's family engagement systems are designed to reduce barriers to involvement, ensuring that families with varied schedules and needs have meaningful opportunities to connect with teachers and school leadership.

Together, these educator- and community-centered systems promote strong school-community partnerships, reinforce high-quality instruction, and create the supportive conditions that enable underserved students to access rigorous learning and achieve at high levels.

## Charter School / Traditional Public School Collaboration

Monticello Academy West Point uniquely maintains an active collaboration with Syracuse High School (Davis School District) to strengthen vertical alignment and ensure Monticello students are prepared for success in rigorous high school coursework beginning in grade 10. This collaboration is designed to benefit students and families by improving continuity of expectations, reducing transition friction, and increasing readiness for honors-level coursework.

### *Collaboration participants*

Vertical alignment meetings include Monticello Academy West Point school leadership and junior high instructional leaders and Syracuse High School honors teachers.

English alignment participants have included:

- Kellyn Spear, Honors English teacher at Syracuse High School

- Rebecca Glasmann, English Department Chair at Monticello Academy West Point
- Dane Roberts, Executive Director of Monticello Academy

Math alignment participants have included:

- Syracuse High School 10th grade honors math teachers Jordan Lerohl, Ashley Salisbury, and Melisa Hamilton
- Sarah Semrow, Monticello Academy West Point teacher and prospective junior high math teacher
- Dane Roberts, Executive Director of Monticello Academy

### *Purpose and focus*

These meetings are structured conversations focused on clarifying the specific skills, concepts, and academic behaviors that students need to demonstrate upon entering Syracuse High School. Monticello uses guidance from Syracuse High School honors teachers to refine junior high scope and sequence, identify high-priority readiness standards, and address common gaps that high school teachers see in incoming students.

### *Roles and responsibilities*

Syracuse High School honors teachers:

- Share course expectations, common readiness gaps, and examples of skills/standards that predict success in honors coursework
- Provide input on the knowledge, writing, and problem-solving demands students will face in grade 10 honors courses

Monticello Academy West Point:

- Shares junior high curriculum maps, unit sequences, and examples of student work (as available) to solicit targeted feedback
- Uses alignment input to adjust instructional priorities, interim skill checkpoints, and readiness benchmarks in grades 6–9
- Incorporates relevant alignment takeaways into PLC planning, coaching “look-fors,” and teacher professional learning

### *Duration and continuity*

This collaboration is ongoing and includes vertical alignment meetings with both honors English teachers and honors math teachers. Monticello will continue these meetings periodically as part of annual curriculum review and grade 9 readiness planning to ensure expectations remain aligned and to continuously strengthen student preparation for high school.

# Budget Narrative — Revised

*Monticello Academy — CSP Expansion Grant (West Point campus)*

*Revision date: June 4, 2026*

## Summary of Changes from Submitted Version

This revised budget reallocates funds within the $2,000,000 grant cap to reflect (a) federal determination that bond debt service is not an allowable CSP expense, (b) grant-manager feedback on personnel taper and supplant/sustainability concerns, (c) refined hiring decisions and program scoping since submission, (d) updated vendor quotes, and (e) the operational decision to distribute administrative capacity across two functional Assistant Director roles rather than a single grade-level position. The total remains exactly $2,000,000.

### Removals

- **Bond debt service ($393,376):** Removed. Federal review determined facilities debt service for new construction is not allowable under CSP. Funds reallocated across categories below.
- **FOSS science curriculum ($54,600):** Removed (Lab Collections $39,000 and Consumables $15,600). The JH science teacher selected an alternative non-FOSS curriculum that pairs with custom-equipped lab spaces. See Science Lab Equipment under Supplies.
- **Math curricula ($15,840):** Removed (Math Student Sets $15,080 and Math Teacher Sets $760). Math materials are largely consumable annually, making them an operating expense rather than a one-time CSP-eligible launch cost. Math manipulatives (durable, multi-year use) are retained.
- **Standalone bus safety/cameras line ($20,000):** Eliminated. The Lewis Bus Group quote is all-inclusive and bundles 4-camera safety system, GPS tracking with first-year subscription, child-reminder system, block heaters, and all Utah-required safety equipment.
- **Standalone transportation startup line ($25,000 submitted):** Eliminated. Delivery, titling, registration, GPS, and safety equipment are bundled into the Lewis Bus Group quote. Remaining startup items (driver recruitment, route mapping, parent communications, insurance setup) absorbed by operating budget.

### Personnel Restructuring

- **Phased-coverage taper revised from 100/66/33 to 100/60/30.** Planning-phase coverage remains at 100% but the planning window narrows from three months to two (hiring begins June 2026). Implementation Year 1 coverage steps down from 66% to 60%; Year 2 from 33% to 30%. The steeper taper directly addresses grant-manager concerns about post-grant sustainability.
- **Single "JH Administrator" line replaced by two functional Assistant Director lines.** Originally the budget included a single $110,000 JH Administrator with 100% JH attribution. Following internal operational review, the school is distributing the same

incremental administrative capacity across two functional roles: an Assistant Director — Curriculum and Instruction (existing position with materially changed scope: Rachael Simpson, now supervising grades 5-7 plus the specials teachers who all teach JH) and an Assistant Director — Discipline and Behavior (new position created for the K-9 expansion). The school's sister campus (Highbury) already operates with this two-AD structure at the same scope, validating the configuration. The functional split (rather than grade-level split) was chosen because combining curriculum and discipline in a single administrator previously proved ineffective — discipline interventions are unpredictable and interrupted planned observation and coaching cycles. CSP funds the FTE-equivalent of expansion-driven work distributed across both positions per documented time-and-effort attribution (60% on the new AD, 40% on Rachael).

- **Marketing and Communications Director restructured to hourly.** Hired hourly at $45/hour, full-time (approximately 2,000 hours/year = $90,000 nominal). Benefits at 27.7% (URS + FICA + Social Security only; the position-holder declined medical) rather than the 40% fringe rate applied to fully-benefited roles. Net effect: slightly lower annual loaded cost than the originally submitted $85K salaried role with 40% fringe.
- **Transportation Director scope expanded to full-time.** Originally framed as a part-time role; revised to full-time at $75,000 with 40% fringe. Holds CDL and drives Route A daily; manages the second driver who handles Route B; oversees both routes, vehicle maintenance, field-trip logistics, Utah DOT compliance, and route planning.
- **Second driver added as a new line.** Part-time, hourly at $30/hour, drives Route B daily. 5 hours/day × 180 school days = approximately $27,000 annual wages. No fringe (under URS threshold). CSP-supported under the same 100/60/30 taper.

### New Capital and Program Lines

- **Classroom remodel ($210,000).** Converts five elementary classrooms to JH-appropriate instructional spaces ($42,000 each). Scope per classroom: hard-surface flooring replacing carpet (science and art rooms), interior paint, casework removal and installation, electrical work for the art-studio kiln, and science-lab plumbing where applicable. Allowability of specified items confirmed by the program officer.
- **Science lab equipment ($50,000).** Outfits two JH science labs at $25,000 per lab. Replaces the removed FOSS line. Per-lab components: microscopes ($3,500), balances and scales ($1,500), glassware ($2,000), hot plates and Bunsen burners ($1,500), dissection kits and specimens ($2,500), chemistry kits and reagents ($4,000), physical-science kits ($4,000), safety equipment ($2,000), demonstration materials and models ($2,500), prep-room storage ($1,500).
- **Outdoor LED marquee ($61,819, tax-exempt).** Roadside marquee tied to marketing and JH recruitment. Desert Dog Signs estimate #4214: 10MM color display, 6'6" × 8'8" cabinet, lower cabinet, reconfigure existing sign for new size, installed. The 10MM ("Toyota") option was selected over the 8MM ("Lexus") option at $74,126 (estimate #4218) — same physical dimensions and install, with the only difference being pixel pitch. The 10MM provides clear roadside legibility at 17% lower cost.

- **Performance-space upgrade ($55,000).** High-quality sound system (~$42,000) and acoustic baffles (~$13,000) for the existing performance venue. Enables JH musical theater capability. Stage lighting is not included; existing FOH lighting remains in place.
- **Marketing technology and creative assets ($32,719).** One-time digital marketing infrastructure for JH program launch: website redesign with JH-specific landing pages and enrollment funnel ($11,500), recruitment print collateral and brochures ($7,319), CRM platform setup and Year 1 license ($5,500), initial SEO audit and on-page setup ($3,500), professional photography session for use across all marketing channels ($2,500), graphic design package — brand refresh and templates ($2,000), and Year 1 content tool licenses ($400). Year-2+ recurring subscriptions funded from operating budget to avoid CSP supplant/sustainability concerns.

### Adjustments to Existing Lines

- **Buses: $400,000 → $419,356.** Replaces the prior generic Type-D placeholder with an executed Lewis Bus Group quote (#11932) for 2 Thomas HDX2 380DS, 84-passenger A/C-equipped buses. All-inclusive: delivery, titling and registration, 4-camera safety system, GPS tracking with first-year subscription, child-reminder system, block heaters, and all federally and Utah-required safety equipment.
- **Direct mail: $20,000 → $38,000.** Expanded from 4 to 8 campaigns. Funds a bus-route saturation strategy in the West Point catchment, calibrated for approximately 4 touches per household over the grant window — exceeding the 3-touch threshold at which direct response marketing reliably moves recognition into enrollment decision.
- **Kiln: $12,000 → $8,500.** Switched specification from Skutt KM-1027-3 (out of stock) to L&L Easy-Fire e23T-3 (in stock, school-preferred) at lower all-in installed cost. L&L's 3-zone Genesis touchscreen controller, easier element replacement, and cool-firing piggyback control panel are better suited to school use.

## Bridge Justification: Why CSP Funds the Personnel Lines

The grant program guidance requires demonstrating that allowable CSP-supported costs cannot be covered by state and local funds. The personnel lines satisfy this requirement on the following basis:

- The school is establishing a new junior high program. Per-pupil state revenue follows enrolled students; until JH enrollment scales to projected capacity, the state and local revenue stream does not exist to fund the additional administrative, marketing, and transportation capacity required for the expansion.
- These roles must be in place before enrollment can scale, not after. A school cannot recruit families and operate transportation routes without an enrollment lead, a transportation lead, and additional academic leadership already on the ground. Sequencing requires the school to incur the cost before the revenue arrives.
- The 100/60/30 taper structures the bridge explicitly: CSP covers the full planning-phase cost, 60% of Year 1, and 30% of Year 2 — at which point ongoing operating revenue is expected to absorb the full cost. If enrollment exceeds projections, any unused CSP draw is redirected to other allowable implementation needs.

- For administrative capacity specifically, the school's sister campus (Highbury) already operates with two Assistant Directors at the same K-9 scope. The West Point expansion to K-9 requires equivalent capacity. CSP funds the incremental FTE of capacity created by the expansion, distributed across two functional positions per the operational structure described in the Personnel section.

# Budget Summary and Phase Structure

The CSP Project Budget totals $2,000,000, allocated across:

- Planning (June 6, 2026 – August 19, 2026): $1,133,343
- Implementation (August 19, 2026 – August 19, 2028): $866,657

Expenditures are organized to (a) prepare for implementation during the planning phase and (b) launch and sustain expanded grades and services during the two-year implementation period. All costs are aligned to the four SMART goals from the project narrative and to the activities required to enroll additional students, improve outcomes, and fully implement the expanded program.

## Alignment to SMART Goals (budget-wide)

- **Goal 1 — ELA Growth:** ELA-aligned texts and literacy resources (Core Knowledge texts, history textbooks, JH library initial collection) supporting content-rich literacy and writing-to-text.
- **Goal 2 — Math Growth:** Singapore Math manipulatives (durable, multi-year use) and Singapore Math professional learning travel supporting implementation fidelity and growth.
- **Goal 3 — Equitable Enrollment Growth & Access:** Recruitment and marketing execution (Marketing Director, marquee, marketing tech, video, digital, direct mail), start-up leadership for transportation, capital investment in two Type-D buses, and second driver to reduce transportation barriers.
- **Goal 4 — Academic Program and Facility Readiness:** Classroom remodel, two functional Assistant Directors providing JH curriculum/instruction and discipline/behavior leadership, FF&E for instructional and specialty rooms, technology, science lab equipment, art/PE/computer science resources, music program, performance-space upgrade for musical theater, and professional learning.

# A. Supplies — $231,070

Supplies fund core curriculum materials and program resources required to serve expanded enrollment and implement the interdisciplinary academic program.

- **ELA and literacy resources (Goal 1):** Core Knowledge texts ($12,480), history textbooks ($9,100), and the JH library initial collection ($37,440) support content-rich reading, background knowledge, and writing-to-text routines.

- **Math tools (Goal 2):** Singapore Math manipulatives ($10,400) support high-fidelity Singapore Math instruction. (Math student and teacher curriculum sets are excluded from CSP as annually-consumable operating expenses.)
- **Music program (Goal 4):** String and woodwind instruments for orchestra and band ($104,000 for 130 instruments × $800 average — durable assets used 10+ years; quantity sized for approximately 50% music participation of 260 JH students), and the initial music repertoire library ($7,650).
- **Science lab equipment (Goal 4):** Outfits two JH science labs at $25,000 per lab ($50,000 total). Replaces removed FOSS curriculum line.

# B. Equipment — $908,090

Equipment and FF&E fund the furnishing and equipping of instructional and specialty spaces, deployment of core technology, capital transportation investment, and program-specific equipment for the expanded grades.

## Instructional and specialty FF&E (Goal 4)

- Student desks and chairs (252 of each) for 9 core academic JH classrooms — district-standard specification.
- Butcher block tables (28 units across Art and CCA rooms) and science lab tables (28 units across two JH science labs).
- Art and lab stools (112), additional bookshelves (15), library-grade bookshelves for the JH library (8), teacher task chairs (15), teacher desks (15), U-shaped small-group tables (9), teacher lecterns (15), and 4-drawer filing cabinets (15).
- Specialty-program FF&E: kiln package ($8,500 — L&L Easy-Fire e23T-3 with vent, furniture kit, dedicated electrical circuit, and floor pad), art studio furniture and storage ($17,960), PE sports equipment ($11,500), and music room outfitting ($40,000).

## Core technology (Goal 4)

- Student Chromebooks (260 units for 1:1 deployment), charging carts (13), teacher/staff/administrator laptops (18), classroom projectors (15), teacher docking stations with document cameras (15), Computer Science classroom set-up ($24,019), and other IT hardware ($5,000).

## Transportation capital (Goal 3)

- **Type-D school buses ($419,356):** Two Thomas HDX2 380DS buses (84-passenger, A/C-equipped) per Lewis Bus Group quote #11932. All-inclusive: delivery to campus, titling and registration, 4-camera safety system with 2TB DVR, GPS tracking with first-year subscription, child-reminder system, block heaters, and all Utah-required school-bus safety equipment. The two buses serve the two defined JH routes; IEP-required ADA transportation is served through contracted per-student transportation or parent mileage reimbursement, paid from operating budget.

## Performance-space upgrade (Goal 4)

- **Sound system and acoustic baffles ($55,000):** Equips the school's existing performance venue with musical-theater-grade sound and acoustic treatment to support JH performing-arts curriculum. Syracuse Arts Academy — Monticello's primary competitor in the West Point catchment, a K-9 charter — operates a robust performing-arts program through its upper grades. Monticello parents have explicitly expressed interest in equivalent musical-theater opportunities as the school expands into junior high. Without venue-grade sound, Monticello cannot retain JH-aged students whose families prioritize arts programming.

## C. Personnel and Fringe Benefits — $417,152

- Salaries and wages: $314,673
- Fringe benefits (URS, FICA, health where elected, Social Security): $102,479

### Phased CSP coverage logic (personnel)

Personnel expenditures are limited to project-critical roles. CSP support is structured as a phased coverage model:

- Planning period: CSP covers 100% of cost during the two-month planning window (June 6, 2026 through August 19, 2026), equivalent to 2/12 of annual compensation.
- Implementation Year 1: CSP covers 60%.
- Implementation Year 2: CSP covers 30%.

For roles with partial JH attribution (the two Assistant Directors), the taper applies to the JH-attributable portion of work, documented via time-and-effort logs. The remainder of those positions is funded from operating budget.

This approach provides start-up capacity during launch and early implementation while transitioning ongoing responsibility to the school as enrollment-driven revenue scales. The steeper taper (vs. 100/66/33 submitted) directly addresses grant-manager guidance to demonstrate post-grant sustainability.

### Administrative capacity restructure — two functional Assistant Directors

The originally submitted budget included a single "JH Administrator" position at $110,000 with 100% JH attribution and a 100/60/30 (revised) taper. Internal operational review determined that distributing the same incremental administrative capacity across two functional roles is materially more effective than a single grade-level position. The structure is modeled on the school's sister campus (Highbury), which already operates with two Assistant Directors at the same K-9 scope.

The rationale for the functional split rather than a JH-only role:

- The school previously attempted a grade-level split (one administrator for elementary, one for upper grades). It proved ineffective because discipline interventions are unpredictable and consistently interrupted planned curriculum observations, coaching cycles, and instructional leadership work.

- Restructuring as a curriculum-and-instruction AD and a discipline-and-behavior AD (Dean-of-Students model) materially improved consistency of observation, feedback to teachers, and instructional leadership at the sister campus.
- Either administrative structure delivers the same incremental capacity required by the K-9 expansion. CSP funds the FTE-equivalent of that expansion-driven capacity, distributed across the two positions per documented time-and-effort attribution.

### Roles

- **Assistant Director — Discipline and Behavior (Goal 4):** NEW POSITION created for the K-9 expansion. Annual salary $100,000 with 47.4% effective fringe rate ($47,391 annual benefits including health). The position exists because of the K-9 expansion — Highbury operates with two ADs at the same K-9 scope, so West Point requires the same capacity. CSP funds 60% of the position's work as JH-attributable × 100/60/30 taper. CSP-supported wages $64,000 + benefits $30,329 = $94,329.
- **Assistant Director — Curriculum and Instruction (Goal 4):** EXISTING POSITION with materially changed scope. Rachael Simpson, annual salary $104,000 with 28.7% effective fringe rate ($29,829 annual benefits; position-holder declined health). Her scope expanded from supervising K-4 elementary teachers to grades 5-7 (which includes JH grades 6-7) plus the specials teachers (Art, Music, PE, Library, Computer Science) — all of whom now also teach JH students. The expansion required the scope shift. CSP funds 40% of her work as JH-attributable × 100/60/30 taper. CSP-supported wages $44,373 + benefits $12,727 = $57,100.
- **Marketing and Communications Director (Goal 3):** Hourly at $45/hour, full-time. Nominal annual wages $90,000. Benefits at 27.7% (URS + FICA + Social Security only; position-holder declined medical). CSP-supported wages $99,000 + benefits $27,423 = $126,423. Drives recruitment and enrollment execution for the JH expansion.
- **Transportation Director (Goal 3):** Full-time, $75,000 annual salary with 40% fringe. CSP-supported salary $80,000 + fringe $32,000 = $112,000. Holds CDL and drives Route A daily; oversees both routes, vehicle maintenance, field-trip logistics, Utah DOT compliance, and route planning; manages and serves as backup for the Route B driver.
- **Second driver (Goal 3):** Part-time, hourly at $30/hour, drives Route B daily. 5 hours/day × 180 school days = $27,000 annual nominal wages. No fringe (under URS threshold). CSP-supported total $27,300.

## D. Contractual — $182,538

Contractual services support recruitment and outreach execution, marketing infrastructure, marquee and signage, professional services, and conference participation.

- **Marketing video production ($20,000):** 4 videos × $5,000. Used across digital marketing, website, and recruitment outreach to showcase the JH program, facility, and faculty.
- **Digital marketing and advertising ($27,000):** Approximately $1,000/month over the grant window. Meta and Google ads, content creation, and ad placement targeting

families in the West Point catchment area. Y1/Y2 spend rebalanced to front-load awareness in Y1 when JH enrollment decisions are first being made.

- **Direct mail campaigns ($38,000):** 8 campaigns × $4,750 average. Each campaign reaches approximately 5,000 households along established and proposed bus routes in West Point and surrounding Davis County zip codes. Saturation strategy provides approximately 4 touches per household over the grant window — exceeds the 3-touch threshold at which direct response marketing reliably moves recognition into enrollment decision.
- **Outdoor LED marquee ($61,819):** Desert Dog Signs estimate #4214 (tax-exempt). 10MM color display, 6'6" × 8'8" cabinet, lower cabinet, reconfigure existing sign for new size, installed. Cost-conscious selection: the 10MM Toyota option saves $12,307 (17%) versus the 8MM Lexus option at the same physical dimensions and install — the only difference is pixel pitch, which is not material for roadside legibility.
- **Marketing technology and creative assets ($32,719):** Website redesign with JH-specific landing pages and enrollment funnel ($11,500), recruitment print collateral and brochures ($7,319), CRM platform setup and Year 1 license ($5,500), initial SEO audit and on-page setup ($3,500), professional photography session for use across all marketing channels ($2,500), graphic design package ($2,000), and Year 1 content tool licenses ($400). One-time launch infrastructure; recurring subscriptions Year 2+ fall to operating budget.
- **Financial advising ($3,000):** Professional advisory services for CSP grant administration, reporting compliance, and documentation.

## E. Travel — $51,150

Travel supports professional learning and observation opportunities aligned to implementation fidelity and instructional improvement.

- **Success Academy professional development ($21,000):** Travel and lodging only — training provided at no charge. 14 staff × $1,500/person for a 3-day NYC immersion.
- **Core Knowledge National Conference, Orlando ($14,000):** Airfare and lodging only. 14 staff × $1,000/person for a 3-day conference.
- **Singapore Math workshops ($4,000):** Airfare and lodging only. 4 staff × $1,000/person.
- **Conference registrations ($12,150):** Core Knowledge National Conference ($7,700), Singapore Math workshops ($1,200), Utah Charter School Conference and Utah ASCD/regional PD ($3,250).

## F. Facilities — $210,000

Facilities expenditures align to Goal 4 (Academic Program and Facility Readiness) by activating instructional space required to implement the expanded program.

- **Classroom remodel ($210,000):** Five elementary classrooms converting to JH instructional spaces at $42,000 each. Scope per classroom: hard-surface flooring replacing carpet (science and art rooms), interior paint, casework removal and installation, electrical work for the art-studio kiln, and science-lab plumbing where applicable. General hallway and circulation flooring is excluded as unallowable.

Note: The submitted version included $393,376 in facilities expansion bond debt service. Federal review determined that debt service for new construction is not an allowable CSP expense, so this line has been removed. Bond debt service will continue to be funded outside CSP from the school's operating budget.

## Summary of Budget-to-Goal Alignment

- **Goal 1 — ELA Growth:** approximately $59,020 (Core Knowledge texts, JH library, history textbooks).
- **Goal 2 — Math Growth:** approximately $14,400 (Math manipulatives + Singapore Math travel and registration).
- **Goal 3 — Equitable Enrollment Growth and Access:** approximately $850,000 (Marketing Director, Transportation Director, second driver, two Type-D buses, marketing video and digital, direct mail, marquee, marketing tech, and creative assets).
- **Goal 4 — Academic Program and Facility Readiness:** approximately $1,076,000 (two Assistant Directors, classroom remodel, instructional and specialty FF&E, science lab equipment, performance-space upgrade, music program, technology, professional learning, kiln, financial advising).

**Total CSP Project Budget: $2,000,000**

**Application Title:Monticello Academy West Point**

**Application's average score:** **92.00**

| | **Reviewer 1** |
|---|---|
| **Total Points awarded by reviewer** | 90 |
| **Overall Review Comments \| Strengths** | Focus on serving disadvantaged student populations, academic excellence and a track record of success. The thoughtfulness behind their SMART goals and how the grant ties to those goals. Roles and responsibilities were clear and the application demonstrated a clear path, timeline, systems, and strategy to actually execute this grant at a high level. |
| **Overall Review Comments \| Weaknesses** | Some elements of the application didn't have as much depth or detail, but that was the exception, not the rule. |
| **Clarity and Completeness of Executive Summary** | 3-Strong Evidence : Provides a clear, concise, and compelling overview of the most critical information and key points, well-organized and easy to follow within the required format. |

**Application Title:Monticello Academy West Point**

**Application's average score: 92.00**

| | **Reviewer 1** |
|---|---|
| **Alignment with Charter School Definition (ESEA § 4310(2))** | 3-Strong Evidence : The school already provided assurance that they meet the federal definition of a charter school during the pre-eligibility phase. |
| **Governance, Operational Independence, and Mission Alignment** | 3-Strong Evidence : There was limited information and/or detail provided regarding how the school maintains and sustains strong governance practices with its board. Improved based on capacity interview. |
| **Math Growth Strategies** | 3-Strong Evidence : Clear, well-defined math strategies explicitly designed to annually improve median growth percentiles. Singapore Math cited as a strategy as well as the Success Academy-inspired PLCs around data and frequent reteaches based on data to provide more learning opportunities to students. Coaching systems and a common language and framework for excellent teaching (Teach Like a Champion) support math and ELA instruction. |
| **ELA Growth Strategies** | 3-Strong Evidence : Clear, well-defined math strategies explicitly designed to annually improve median growth percentiles. CKLA cited as a curriculum/strategy as well as the Success Academy-inspired PLCs around data and frequent reteaches based on data to provide more learning opportunities to students. Extra Literacy block referenced as well as adherence to the Science of Reading. Coaching systems and a common language and framework for excellent teaching (Teach Like a Champion) support math and ELA instruction. |
| **Growth Plan & Enrollment Strategy** | 2-Moderate Evidence : Adequate description of grades served, projected enrollment by year/grade, and strategies. |
| **Professional Development** | 3-Strong Evidence : Strong and coherent PD plan that combines in-house development with external conferences and opportunities. Just as important if not more so is the ongoing PD through 1-on-1 coaching at a cadence of at least every other week. |

**Application Title:Monticello Academy West Point**

**Application's average score:** **92.00**

**Reviewer 1**

| | |
|---|---|
| **Feasibility & Sustainability** | 3-Strong Evidence : Sustainability comes with future enrollment, with current grant dollars being phased out over time. Would have liked to have learned more about the school's financial and organizational performance framework ratings to strengthen its case for expansion. Improved based on capacity interview. |
| **SMART Goals Aligned to Project Design** | 3-Strong Evidence : 4 clearly defined SMART goals aligned to budget and activities, including two goals addressing ELA and Math achievement or growth for educationally disadvantaged students. |
| **Goal Tracking & Progress Monitoring** | 3-Strong Evidence : Plan include clear, well-defined systems for tracking progress, including data collection, disaggregated analysis, and regular progress reviews. The monthly meeting framework is a strong forcing mechanism to ensure the team keeps these goals and the KPIs front and center. The application cites specific members of the team that will be involved in the progress monitoring and at what cadence. |
| **Monitoring and Improving Academic Outcomes** | 3-Strong Evidence : Focus on outcomes, not just activities. Application has clear, specific strategies to regularly monitor and improve academic outcomes for all student populations. Clear plan for how to respond to benchmarks/screeners and differentiate support based on data. |
| **Identification of Underserved and Educationally Disadvantaged Student Needs** | 2-Moderate Evidence : Describes reasonable methods to identify needs of underserved and educationally disadvantaged students. More detail could be provided regarding the step-by-step process and roles of various staff in that process. |

**Application Title:Monticello Academy West Point**

**Application's average score:** **92.00**

| | **Reviewer 1** |
|---|---|
| **Equitable and Inclusive Practices to support and address the identified needs of ALL students** | 3-Strong Evidence : Adequate plans for equitable and inclusive practices aligned to identified needs. Mentions adherence to core curricula for math and ELA, ensuring students have "structured pathways" to participate in grade level rigorous material. Multilingual supports mentioned, including interpretation services. Transportation is a focus of the grant activity to provide easier access to the schools for families who otherwise may not be able to attend. |
| **Family & Community Engagement** | 3-Strong Evidence : Clear, proactive strategies to actively engage families and the broader community in support of the school’s mission and success, including the Parent Council, community events throughout the year, multiple methods for outreach and engagement. |
| **Inclusive Decision-Making Opportunities** | 3-Strong Evidence : Reasonable opportunities described for family and community participation, especially through the multiple family surveys given and responded to throughout the year. Examples of that "feedback-to-action" cycle in the real world would have been helpful. Improved based on capacity interview. |
| **Pre-Planning Engagement and Community Buy-In** | 3-Strong Evidence : Adequate evidence of engagement with families and community stakeholders. More detail could have been provided. Improved based on capacity interview. |
| **Equitable Recruitment, Enrollment, and Retention** | 2-Moderate Evidence : Adequate strategies to engage diverse families in recruitment, admissions, enrollment, and retention, but more detail could have been provided. |
| **Projected Enrollment and Evidence of Demand** | 3-Strong Evidence : Reasonable enrollment projections supported by basic needs analysis or calculations. Details on methodology lacking. Improved based on capacity interview. |

**Application Title:Monticello Academy West Point**

**Application's average score:** **92.00**

| | **Reviewer 1** |
|---|---|
| **Alignment to Local Needs and Access** | 3-Strong Evidence : Clearly explains how the school will support local student and family needs through use of district/community assets and a location that provides strong access for the targeted population. The data and comparisons of surrounding district schools was helpful in demonstrating the need and the community being served. |
| **Transportation Strategy and Equity** | 3-Strong Evidence : Clear, detailed plan ensuring reliable, safe, and equitable transportation for all students, including those with disabilities or special needs. This is evidenced by the plan to purchase two ADA-compliant buses and staff a FTE position to ensure that transportation is not a barrier for enrollment and attendance. Students with disabilities will receive dedicated transportation services as needed. |
| **Access and Logistics** | 2-Moderate Evidence : The plan adequately addresses location, public transportation, walking access, and alternative transportation options. It also recognizes the limitations of the plan to have only two buses and acknowledges that it may still mean that some families are waitlisted for transportation services and need to make separate arrangements for their student to attend the school without interruption or inconsistency. |
| **Community Notification and Recruitment** | 3-Strong Evidence : Clear, detailed plan for community notification, although they didn't mention social media channels or paid marketing/advertising. Other details surrounding the process were clear and comprehensive. |
| **Lottery Implementation, Waitlist, and Enrollment** | 3-Strong Evidence : Clear, detailed procedures for conducting a random lottery, managing waitlist, and students efficiently and fairly by leveraging the SchoolMint Enroll software which provide transparency, fidelity, and automated fairness. |
| **Board Member Information** | 3-Strong Evidence : Limited details on board members, roles, or expertise; some names mentioned, but unclear whether it's all board members. Several activities and fields of expertise mentioned, but not clear who does what or has what background. Improved based on capacity interview, deck provided. |

**Application Title:Monticello Academy West Point**

**Application's average score:** **92.00**

| | **Reviewer 1** |
|---|---|
| **Project Manager, Support Team, and Partner Organizations / ESPs** | 2-Moderate Evidence : Adequate description of project manager and support team roles, responsibilities, timeline, and any partner organization involvement; some detail on maintaining administrative control. |
| **Charter School Autonomy and Authorizer Relationship** | 2-Moderate Evidence : Adequate description of autonomy and authorizer relationship, generally aligned with mission. |
| **Quality Control and Accountability** | 3-Strong Evidence : Clear, detailed plan for quality control, including contracts/performance agreements, state accountability, student achievement, and mechanisms guiding renewal or revocation decisions. Regular meetings, oversight structures, and audits to ensure that data is reviewed and finances and operations are in order. |
| **Comprehensive Budget Narrative** | 3-Strong Evidence : Budget narrative complete and thorough, providing details around a line by line breakdown of expenditures and personnel with rationale included. Budget is broken down and disaggregated several ways, including by grant goals. |
| **Planning vs. Implementation Phases** | 2-Moderate Evidence : Adequate differentiation of phases with most budget line items described for planning and implementation. Some detail and depth missing. |
| **Personnel Costs** | 3-Strong Evidence : Clear, detailed explanation of all personnel roles, responsibilities, and justified allocation to planning or implementation periods. |
| **Accountability for Funds** | 2-Moderate Evidence : Adequate plan describing accountability measures, including reporting and oversight. |

**Application Title:Monticello Academy West Point**

**Application's average score:** **92.00**

| | **Reviewer 1** |
|---|---|
| **Post-Grant Sustainability** | 2-Moderate Evidence : Adequate plan for maintaining financial sustainability post-grant. A post-grant model is mentioned but not in detail. |
| **Innovative Charter Model** | 0-No Evidence : Unclear what is "innovative" about the model. Just because a school meets a community demand and is high-performing doesn't mean it's innovative. |
| **High-Quality High School Programs** | 1-Evidence Provided: Applicant provides clear, specific plans for high-quality programs tailored to 9th graders, including: curriculum, rigorous instruction, alignment to student needs and graduation requirements, and supports to prepare students for college, career, or postsecondary pathways. |
| **Meeting Rural Needs** | 0-No Evidence : n/a - did not complete |
| **Promotion of Educator and Community-Centered Models** | 1-Evidence Provided: Applicant provides clear, specific plans for promoting high-quality educator and community-centered models, including: teacher leadership opportunities, teacher voice related to curriculum refinement, PLCs, and instructional coaching and development for teachers. Community-centered practices were also mentioned from family outreach, volunteer opportunities, open-door-observation policy, etc. |
| **Charter School/Traditional Public School Collaboration** | 1-Evidence Provided: School demonstrates an existing partnership with Syracuse High School, part of the local school district, as it vertically aligns and prepares its students to attend there when they age/grade out of Monticello Academy West Point. Regular meetings with key personnel at both schools was cited as evidence of this partnership, which is ongoing. |

**Application Title:Monticello Academy West Point**

**Application's average score:**

| | **Reviewer 2** |
|---|---|
| **Total Points awarded by reviewer** | **96** |
| **Overall Review Comments \| Strengths** | The application presents a well-structured and comprehensive plan for expanding Monticello Academy West Point's junior high program. The proposal demonstrates strong alignment between the project design, SMART goals, instructional strategies, and financial planning. The academic program is clearly defined and supported by research-based instructional frameworks such as Core Knowledge and Singapore Math, along with structured literacy interventions and MTSS supports designed to improve outcomes for educationally disadvantaged students. The project goals are specific, measurable, and supported by detailed systems for progress monitoring, including disaggregated data analysis and regular goal-team check-ins. Governance and project management structures are clearly defined, with experienced leadership responsible for implementation, financial oversight, and operational coordination. The financial management plan is particularly strong, providing a detailed budget narrative, clear differentiation between planning and implementation phases, well-defined personnel roles, and a thoughtful sustainability strategy. The proposal also demonstrates strong community engagement practices and an intentional approach to educator leadership and professional collaboration. In addition, the partnership with Syracuse High School to align academic expectations and improve student readiness for high school coursework reflects a meaningful collaboration that benefits students and strengthens the academic pipeline. |
| **Overall Review Comments \| Weaknesses** | Some sections provide incomplete information relative to rubric expectations. The governance section describes board expertise and structure but does not include a full list of board members with names, roles, and contact information. The proposal also provides limited evidence of formal pre-planning engagement with community stakeholders specifically tied to the expansion project. Additionally, the application does not address rural needs in the competitive preference section, which results in the loss of potential points under that criterion. |
| **Clarity and Completeness of Executive Summary** | 3-Strong Evidence : The executive summary provides a clear, concise overview of the project and key elements of the proposal. It explains the purpose of the CSP expansion grant, the number of seats to be added, the grades involved, and the implementation timeline. The summary also clearly describes the school's instructional model, including Core Knowledge and Singapore Math, as well as the interdisciplinary enrichment program. The narrative connects grant-funded activities—such as curriculum, professional development, recruitment, technology, and transportation—to the project's goals and expected outcomes. Overall, the summary is well organized and provides a coherent overview that helps the reviewer understand the proposal. |

**Application Title:Monticello Academy West Point**

**Application's average score:**

| | Reviewer 2 |
|---|---|
| **Alignment with Charter School Definition (ESEA § 4310(2))** | 3-Strong Evidence : The proposal clearly states that Monticello Academy operates under a charter held by a nonprofit LEA and explicitly references alignment with ESEA §4310(2). The summary describes the school's autonomy over curriculum, staffing, budgeting, and scheduling, demonstrating flexibility consistent with the federal charter school definition. The explanation clearly connects this autonomy to the school's ability to implement its instructional model and support project goals. |
| **Governance, Operational Independence, and Mission Alignment** | 3-Strong Evidence : The executive summary clearly describes the governance structure and operational independence of the school. It identifies the Monticello Academy Board of Trustees as the governing body and explains that operational authority is delegated to school leadership while maintaining board oversight. The proposal also clarifies that the school does not contract with an external management organization, reinforcing full operational independence and accountability for results. This explanation clearly connects governance structures to mission implementation and effective project management. |
| **Math Growth Strategies** | 3-Strong Evidence : The application provides clear and well-defined strategies designed to improve math growth. The school outlines the use of Singapore Math as a mastery-based instructional framework combined with structured PLC data meetings, frequent checks for understanding, and targeted reteaching cycles. The narrative clearly explains how assessment data will be used to diagnose misconceptions, guide small-group instruction, and monitor mastery, creating an intentional cycle aimed at improving Median Growth Percentiles annually. |
| **ELA Growth Strategies** | 3-Strong Evidence : The applicant presents a detailed and coherent strategy for improving ELA growth. The proposal connects the Core Knowledge curriculum, structured reading comprehension routines, writing-to-read practices, and tiered literacy supports to improved student outcomes. The plan includes targeted interventions such as REWARDS for decoding support and Junior Great Books for advanced readers, along with structured data cycles and writing-based assessment practices that are explicitly intended to drive annual improvements in ELA Median Growth Percentiles. |
| **Growth Plan & Enrollment Strategy** | 3-Strong Evidence : The growth plan is clearly described with detailed enrollment projections by grade level and implementation year. The proposal explains the phased expansion across grades 6–9, including seat increases, projected class sizes, recruitment strategies, and transportation supports designed to increase access. The narrative also includes facility readiness and classroom capacity expansion, demonstrating a complete and realistic strategy for reaching enrollment targets. |
| **Professional Development** | 3-Strong Evidence : The professional development plan is coherent and well-developed. The proposal describes multiple layers of professional learning including pre-service training, biweekly coaching cycles, PLC data meetings, curriculum training in Core Knowledge and Singapore Math, and external professional learning opportunities with high-performing charter networks. These structures demonstrate a clear plan for ensuring that teachers and administrators understand and implement the instructional model with fidelity. |

**Application Title:Monticello Academy West Point**
**Application's average score:**

| | Reviewer 2 |
|---|---|
| **Feasibility & Sustainability** | 3-Strong Evidence : The application provides a clear and feasible long-term plan for staffing, facilities, and financial sustainability. The proposal describes a phased hiring plan aligned to enrollment growth, ongoing financial oversight by leadership and the governing board, and facility construction that is already underway. The narrative also demonstrates planning for conservative enrollment scenarios, indicating that the school could remain financially stable even if projected enrollment growth occurs more slowly than anticipated. |
| **SMART Goals Aligned to Project Design** | 3-Strong Evidence : The applicant provides clear and measurable academic goals focused on improving RISE Median Growth Percentiles (MGP) for educationally disadvantaged student groups. The proposal includes baseline data using a three-year campus average and establishes a measurable target of increasing growth by five MGP points by Spring 2028 for economically disadvantaged students, English learners, and students with disabilities. The goals are time-bound, data-driven, and clearly aligned with state accountability measures. The narrative also includes structured monitoring systems such as monthly goal team meetings, mid-project benchmarks, and corrective action triggers, demonstrating a strong and systematic process for tracking progress and ensuring accountability for academic improvement. |
| **Goal Tracking & Progress Monitoring** | 3-Strong Evidence : The application describes a clear and well-structured system for monitoring progress toward project goals. Each goal is assigned to a designated lead and cross-functional team responsible for implementation. The plan includes monthly progress review meetings, defined mid-project benchmarks, and the use of multiple data sources such as disaggregated subgroup performance data, enrollment metrics, and implementation evidence tied to grant expenditures. The monitoring system includes corrective action triggers and documentation procedures to ensure that teams adjust implementation strategies if progress falls below expected benchmarks. These structures demonstrate a strong and systematic approach to tracking progress and maintaining accountability throughout the grant period. |
| **Monitoring and Improving Academic Outcomes** | 3-Strong Evidence : The application describes clear and specific strategies to monitor and improve academic outcomes for all student populations. The school outlines a Multi-Tiered System of Supports (MTSS) that includes frequent checks for understanding, interim assessments, PLC analysis of student work, and ongoing observation and coaching cycles. The proposal also identifies key leading indicators such as benchmark assessments, literacy progress monitoring, intervention effectiveness, and attendance patterns. Monthly goal check-ins and documented reteach cycles ensure that instructional adjustments occur when students or subgroups are not meeting expected progress, demonstrating a strong and systematic process for improving academic outcomes. |
| **Identification of Underserved and Educationally Disadvantaged Student Needs** | 3-Strong Evidence : The applicant clearly describes systematic methods used to identify underserved and educationally disadvantaged students. Identification methods include universal screening, enrollment record review, teacher observations, and diagnostic assessments. The application specifies formal identification processes such as WIDA screening for English learners and IDEA/Section 504 procedures for students with disabilities. Additional reading diagnostics and performance data are used to identify students with literacy needs. These processes demonstrate a comprehensive and systematic approach to identifying the needs of diverse student populations. |

**Application Title:Monticello Academy West Point**

**Application's average score:**

| | **Reviewer 2** |
|---|---|
| **Equitable and Inclusive Practices to support and address the identified needs of ALL students** | 3-Strong Evidence : The proposal outlines comprehensive plans to implement equitable and inclusive practices across instructional and operational systems. The school describes tiered literacy supports, inclusion-based special education services, sheltered instruction aligned to the SIOP framework for English learners, and curriculum design that supports diverse learners through Core Knowledge and Singapore Math. Professional development, classroom observation cycles, and structured discussion routines ensure inclusive instructional practices across classrooms. The application also includes family engagement and language access supports such as translation services and multilingual communication systems, which help ensure equitable access for families from diverse backgrounds. |
| **Family & Community Engagement** | 3-Strong Evidence : The application provides clear and proactive strategies for engaging families and the broader community in support of the school's mission. The school describes multiple engagement opportunities including annual Open House events showcasing student learning, an active Parent Organization that hosts community events such as a fall carnival and jog-a-thon, and an open-door culture that encourages families to observe classrooms. The school also intentionally reduces barriers to participation through flexible volunteer options, varied event scheduling, and multiple communication channels including text-based messaging and translation services. These strategies demonstrate a strong commitment to sustained family engagement. |
| **Inclusive Decision-Making Opportunities** | 3-Strong Evidence : The proposal describes clear and meaningful opportunities for families and community members to participate in decision-making processes. The Parent Council plays an active role in directing Land Trust fund spending, coordinating volunteer efforts, and providing input on school programming and engagement priorities. In addition, a parent representative serves on the governing board, ensuring parent perspectives are represented in school governance. The school also uses regular stakeholder surveys and feedback channels to gather input from families and incorporate that feedback into school improvement decisions. |
| **Pre-Planning Engagement and Community Buy-In** | 2-Moderate Evidence : The proposal describes ongoing family engagement activities and community outreach efforts; however, evidence of formal pre-planning engagement specifically informing the expansion project is somewhat limited. While the school maintains an active community presence, additional documentation of stakeholder feedback used to guide the expansion would strengthen this section. |
| **Equitable Recruitment, Enrollment, and Retention** | 3-Strong Evidence : The proposal outlines clear and accessible recruitment, enrollment, and retention strategies designed to engage families from diverse backgrounds. Recruitment efforts include multi-channel outreach through digital advertising, social media, direct mail, and participation in community events. The school also plans targeted outreach in Clearfield, Sunset, and Hooper to increase equitable access, supported by transportation planning to reduce geographic barriers. Retention strategies include frequent communication with families, opportunities for classroom observation, family satisfaction surveys, and transition supports for students entering junior high. These practices demonstrate a comprehensive approach to supporting diverse families throughout recruitment and enrollment. |
| **Projected Enrollment and Evidence of Demand** | 3-Strong Evidence : The application provides clear enrollment projections with a detailed grade-by-grade expansion plan over the two implementation years. The proposal specifies the number of seats added at each grade level and explains how the expansion will result in 260 additional seats by the end of the grant period. The applicant supports these projections with evidence of demand, including 168 new applications for the upcoming school year, existing waitlists across multiple grade levels, and current facility space constraints that have required conversion of shared spaces into classrooms. The narrative also explains that the school will continue monitoring application, registration, and waitlist data to track demand and adjust outreach strategies. These elements provide strong evidence supporting the enrollment projections. |

**Application Title:Monticello Academy West Point**
**Application's average score:**

| | Reviewer 2 |
|---|---|
| **Alignment to Local Needs and Access** | 2-Moderate Evidence : The proposal provides reasonable evidence of community demand, including application numbers, waitlists, and comparisons with nearby schools. However, the needs analysis and explanation of how community assets will be utilized to support the expansion could be more fully developed. Additional detail regarding how community partnerships and local resources will directly support the expanded program would strengthen alignment to local needs. |
| **Transportation Strategy and Equity** | 3-Strong Evidence : The application provides a clear and detailed transportation strategy designed to ensure reliable, safe, and equitable access for all students. The school plans to acquire two ADA-compliant Type D buses that will provide no-cost transportation to families through structured morning and afternoon routes. A dedicated Transportation Lead will oversee route planning, driver hiring, safety procedures, and operational compliance. The proposal also includes specific procedures for identifying and serving students with disabilities through IEP and Section 504 processes, ensuring coordination between the Special Education Director and transportation staff. Safety and compliance measures such as driver training, maintenance schedules, ridership tracking, and emergency procedures demonstrate a well-developed and equitable transportation plan. |
| **Access and Logistics** | 2-Moderate Evidence : The application provides a clear transportation strategy, including planned bus routes and procedures for managing ridership and accessibility needs. While the plan addresses transportation barriers for families, additional detail regarding neighborhood access patterns, demographic considerations, or alternative transportation options would further strengthen the explanation of how the school's location supports equitable access. |
| **Community Notification and Recruitment** | 3-Strong Evidence : The application provides a clear and detailed plan for notifying the community and recruiting students. The school outlines a consistent annual enrollment timeline, including open enrollment beginning the Monday before Thanksgiving, Round 1 applications accepted through December and January, and the lottery conducted on February 1 or the first Monday in February if the date falls on a weekend. The proposal explains how the school publicizes enrollment and lottery information through its website, the SchoolMint platform, and direct communication with families. Notifications are delivered via email and text message and translated into families' preferred languages to ensure accessibility. The applicant also clearly identifies permitted lottery preferences such as siblings of current students, children of employees, students articulating from another Monticello campus, and founder-related preferences when allowed by law. |
| **Lottery Implementation, Waitlist, and Enrollment** | 3-Strong Evidence : The proposal describes clear and detailed procedures for conducting the lottery, managing waitlists, and enrolling students. When applications exceed available seats, the school uses the SchoolMint platform to conduct a statistically random selection process in which applicants are assigned random numbers and ranked accordingly. The narrative explains the process for initial seat offers following the lottery, including a two-week acceptance period for families, as well as procedures for subsequent rolling offers from the waitlist with a three-day acceptance window. Waitlists are maintained separately by grade, and late applicants are placed at the end of the waitlist in order of application. The process demonstrates transparency, fairness, and efficiency in lottery administration and student enrollment. |
| **Board Member Information** | 2-Moderate Evidence : The application provides information about the governing board's expertise, committee structure, and oversight responsibilities. The narrative describes the board's experience in education leadership, finance, industry, and community engagement and explains the role of the Audit Committee and other governance functions. However, the section does not include a full list of board members with names, roles/officer titles, and email addresses as required by the rubric. Because complete board member contact information is not presented in this section, the evidence is adequate but not fully complete. |

**Application Title:Monticello Academy West Point**

**Application's average score:**

| | **Reviewer 2** |
|---|---|
| **Project Manager, Support Team, and Partner Organizations / ESPs** | 3-Strong Evidence : The proposal clearly identifies the project management team and explains their roles and responsibilities in implementing the CSP expansion. The Executive Director serves as Project Manager, supported by the Business Manager, Director of Operations, and Campus Director, each responsible for key aspects of budgeting, procurement, compliance, and day-to-day implementation. The narrative explains how the team will monitor progress through monthly goal-team meetings and board updates to ensure the project remains on schedule and within budget. The school also clearly states that it does not contract with an ESP or CMO and retains full administrative control over the project. |
| **Charter School Autonomy and Authorizer Relationship** | 3-Strong Evidence : The application clearly explains the school's autonomy and its relationship with the Utah State Charter School Board as the authorizer. The proposal describes how the school maintains independent control over curriculum, staffing, budgeting, and scheduling while remaining accountable through required reporting, monitoring, and audits. The narrative demonstrates alignment with the definition of charter school autonomy under ESEA §4310(2) and explains how this autonomy supports mission-driven decision-making and effective project implementation. |
| **Quality Control and Accountability** | 3-Strong Evidence : The application outlines a detailed system of quality control and accountability measures. The proposal describes academic monitoring through state assessments and internal data systems, financial accountability through annual independent audits and board-level audit oversight, and operational monitoring through regular instructional observations and compliance reviews. The school also explains internal financial controls such as separation of duties, procurement procedures, and asset tracking to ensure appropriate use of grant funds. These processes demonstrate strong oversight and mechanisms for maintaining accountability throughout the project. |
| **Comprehensive Budget Narrative** | 3-Strong Evidence : The application provides a clear and detailed budget narrative that explains how expenditures align with project activities and goals. The narrative describes the major categories of spending, including personnel, travel, equipment, supplies, contracted services, and facilities-related costs, and indicates that each line item includes unit assumptions and timing. The budget narrative also explicitly states that expenditures are aligned with the project's SMART goals to ensure allowability and reasonableness. This level of detail demonstrates strong alignment between the budget and the overall project design. |
| **Planning vs. Implementation Phases** | 3-Strong Evidence : The proposal clearly distinguishes between planning and implementation phases. Planning-phase expenditures focus on pre-opening readiness activities such as procurement preparation, enrollment systems, and launch planning, while implementation-phase expenditures support the staged expansion of grades and the resources needed to sustain new student seats. The narrative explains how funding is allocated across phases and describes how costs are tied to the timeline of expansion activities. |
| **Personnel Costs** | 3-Strong Evidence : Personnel costs are clearly explained, including roles, responsibilities, and how costs are allocated across planning and implementation phases. The narrative identifies three CSP-funded positions—Junior High Director, Marketing and Communications Director, and Transportation Lead—and provides detailed compensation calculations and phased funding levels across the grant period. The proposal explains that personnel costs are fully supported during the planning phase and gradually decrease during implementation years, demonstrating a clear strategy for transitioning ongoing responsibilities to the school. |
| **Accountability for Funds** | 3-Strong Evidence : The application provides a clear plan for financial accountability and oversight. The school describes multiple internal controls, including separation of duties, documented procurement procedures, asset tracking, and budget-to-actual monitoring. The narrative also explains that the school undergoes annual independent audits and has experience administering federal funds and complying with Single Audit requirements. Board-level audit oversight further strengthens accountability mechanisms. |

**Application Title:Monticello Academy West Point**

**Application's average score:**

| | **Reviewer 2** |
|---|---|
| **Post-Grant Sustainability** | 3-Strong Evidence : The proposal presents a clear and well-defined plan for financial sustainability after the grant period. The phased personnel funding model and declining CSP bond coverage schedule demonstrate how costs will gradually transition to the school's operating budget as enrollment increases. The school also reports that it has developed multi-year financial projections, including a conservative downside enrollment scenario, showing that the school can sustain the expanded program and meet financial obligations once the subgrant ends. |
| **Innovative Charter Model** | 1-Evidence Provided: The application provides clear evidence of an innovative charter model that addresses an identified community need. The proposal explains that the expansion creates a coherent 6–9 academic pathway designed to prepare students for rigorous high school coursework while supporting educationally disadvantaged students. The narrative describes the integration of the Core Knowledge curriculum, Singapore Math, structured literacy interventions, and strong instructional systems such as PLCs and coaching cycles. The model also includes a required well-rounded program in visual art, music, computer science, and physical education for all students, ensuring broad access to enrichment opportunities that support academic engagement and achievement. |
| **High-Quality High School Programs** | 1-Evidence Provided: The proposal provides clear plans for high-quality programming for grade 9 students, which functions as the first high school credit-bearing year in the local community. The narrative explains that students will participate in rigorous, standards-aligned coursework including English I, Secondary Math I, Integrated Science, and Geography/Civics. The program incorporates high-expectations instructional practices, structured academic supports, and advisory structures that help students build study skills and academic independence. The continuation of a well-rounded program in the arts, computer science, and physical education further supports engagement and preparation for future high school coursework. |
| **Meeting Rural Needs** | 0-No Evidence : The narrative does not describe strategies for serving students in rural geographic areas, nor does it identify rural locale codes or address challenges unique to rural communities. Because the application does not include evidence related to rural needs, this criterion does not meet the requirements for the competitive preference priority. |
| **Promotion of Educator and Community-Centered Models** | 1-Evidence Provided: The application provides clear evidence of educator-centered and community-centered practices designed to support underserved students. The proposal describes distributed teacher leadership, teacher-driven curriculum refinement, embedded professional learning communities, and ongoing instructional coaching to support high-quality teaching. The narrative also highlights open-door family engagement, parent volunteer opportunities, and feedback mechanisms that allow families to contribute to school improvement. These practices demonstrate strong collaboration between educators and families to support student success. |
| **Charter School/Traditional Public School Collaboration** | 1-Evidence Provided: The application clearly describes a collaboration between Monticello Academy West Point and Syracuse High School in Davis School District. The partnership focuses on vertical alignment of curriculum and expectations to prepare Monticello students for rigorous honors-level coursework in grade 10. The narrative details the participants involved, the purpose of the collaboration, and how the information from high school teachers is used to refine junior high curriculum and instructional priorities. This collaboration is designed to improve student readiness for high school and strengthen educational continuity for students transitioning between schools. |

**Application Title:Monticello Academy West Point**

**Application's average score:**

| | **Reviewer 3** |
|---|---|
| **Total Points awarded by reviewer** | **90** |
| **Overall Review Comments \| Strengths** | The application presents a well-developed and coherent expansion plan supported by an established academic model and operational structure. The executive summary clearly communicates the purpose of the expansion, the grades to be added, and the instructional framework, including the use of Core Knowledge and Singapore Math, with a stated focus on improving outcomes for educationally disadvantaged students. Governance structures are clearly defined, with appropriate delineation between board oversight and school leadership, indicating a stable and functional organizational foundation.  The educational model is a notable strength of the application. The proposal provides detailed descriptions of instructional strategies in both mathematics and ELA, including structured literacy practices, frequent checks for understanding, data-driven PLC routines, and targeted small-group interventions. The integration of established programs and partnerships, including Success Academy practices and Teach Like a Champion techniques, further strengthens the instructional approach. The growth plan is clearly articulated with grade-level enrollment projections and aligned recruitment strategies, and the professional development plan demonstrates strong alignment with the instructional model and expansion needs.  The application also demonstrates strong systems for goal setting and progress monitoring, with clearly defined SMART goals and detailed plans for tracking performance through regular data reviews and accountability structures. Community demand is well supported through waitlist data and demographic analysis, and the transportation plan provides a comprehensive and equitable approach designed to remove access barriers. Overall, the proposal reflects a school with demonstrated capacity to expand its model effectively. |
| **Overall Review Comments \| Weaknesses** | While the application demonstrates many strengths, several sections lack the level of detail and specificity needed to fully assess implementation. In the plan for serving student needs, the application outlines multiple components of an MTSS framework but does not provide sufficient detail regarding the structure of intervention tiers or how students move between levels of support. A more comprehensive explanation of how the MTSS system operates in practice would strengthen confidence in the school's ability to systematically address varying student needs.  Family and community engagement strategies are described but remain somewhat general. While the application references events, volunteer opportunities, and a parent organization, these elements would benefit from more specific detail regarding how engagement will be structured, sustained, and measured over time. Additionally, there is some lack of clarity regarding the roles of different parent groups described in the application.  Several operational and financial components also require further development. The governance section is a significant concern, as required board member documentation was not provided, limiting the ability to evaluate board composition and expertise. Project management structures are only partially described, with limited detail regarding individual roles, responsibilities, and oversight of the expansion timeline. In the financial section, the budget narrative lacks sufficient itemization, distinctions between planning and implementation are not clearly articulated, and personnel roles and cost justifications are not fully explained. The sustainability plan is broadly stated but would benefit from more detailed projections demonstrating how ongoing costs will be absorbed post-grant. |
| **Clarity and Completeness of Executive Summary** | 3-Strong Evidence : The Executive Summary offers a clear, well-structured explanation of the context and nature of the funding request. The applicant seeks to expand it K-5 plus partial 6th grade cohort across grades 6-9 over two implementation years. Key components of the program design are described to include the Core Knowledge Sequence, Singapore Math, and a well-rounded interdisciplinary program.The school's purpose is identified to improve outcomes for educationally disadvantaged students and drive annual growth in both ELA and mathematics. |

**Application Title:Monticello Academy West Point**
**Application's average score:**

| | Reviewer 3 |
|---|---|
| **Alignment with Charter School Definition (ESEA § 4310(2))** | 2-Moderate Evidence : The response affirms autonomy over curriculum, staffing, budgeting, and scheduling. Specific connections are implied in the references to a structured literacy block and MTSS routines, but explicit explanations of how the school utilizes autonomies and flexibilities granted under charter school law are not found. |
| **Governance, Operational Independence, and Mission Alignment** | 3-Strong Evidence : The response identifies the existence of a sister school under the same charter held by Monticello Academy, Inc. There is a clear delineation of authority with the Board of Trustees providing governance and oversight while delegating day-to-day operational authority to school leadership. |
| **Math Growth Strategies** | 3-Strong Evidence : The response identifies strategies that are intended to drive improvement in both math and ELA to include collaboration with Success Academy for high-leverage practices, structured data meetings within PLCs, Teach LIke a Champion instructional techniques, and teacher feedback routines (2). Strategies specific to math growth include a consistent instructional cadence and frequent checks for understanding, the use of Singapore Math as the core instructional approach, and structured PLC data meetings (2-3). The response does not provide measurable goals for math growth in this section but they are clearly outlines in the subsequent section of the application (8). Supports for student success are well indicated, however, with "short-cycle reteaching, small-group instruction aligned to identified needs, targeted practice designed to correct misconceptions, and extension tasks for students ready to accelerate" (3). |
| **ELA Growth Strategies** | 3-Strong Evidence : The response identifies strategies that are intended to drive improvement in both math and ELA to include collaboration with Success Academy for high-leverage practices, structured data meetings within PLCs, Teach LIke a Champion instructional techniques, and teacher feedback routines (2). Strategies specific to ELA growth include high-impact reading strategies, structured discussion routines, a literacy block four times per week, the REWARDS program as an evidence-based intervention, and Junior Great Books. Strategies for student to write in reponse to text are described as key components of the literacy program (3-4). The response does not provide measurable goals for literacy growth in this section but they are clearly outlined in the subsequent section of the application (8). Supports for student success, however, are well indicated with "focused small-group instruction, revised textdependent questions, and targeted practice aligned to identified needs" (4). |
| **Growth Plan & Enrollment Strategy** | 3-Strong Evidence : A clear growth plan is presented with specific numbers of seats per grade level in the two years of implementation to be supported by the grant (4-5). Strategies to meet enrollment goals are described using standard and expected methods of communication and outreach (5). |
| **Professional Development** | 3-Strong Evidence : A professional development plan is presented that presents strong connections with the educational model and growth plans. Key elements of the professional development plan are identified to include curriculum and model training, PLC and data routines, instructional technique development, and MTSS implementation (6). |

**Application Title:Monticello Academy West Point**
**Application's average score:**

| | Reviewer 3 |
|---|---|
| **Feasibility & Sustainability** | 3-Strong Evidence : The applicant affirms an expansion plan that is financially and operationally feasible and designed to remain sustainable beyond the CSP grant period (7). The additional hires necessary for the expansion are built into the school's budget model and will be sustained by the per pupil funding of the added enrollment. The response cites the applicant's track record of successful growth with lessons learned from prior expansion guide planning for the current project. |
| **SMART Goals Aligned to Project Design** | 3-Strong Evidence : SMART goals are clearly identified to include ELA growth, Math growth, equitable enrollment growth and access, and academic program and facility readiness (8-9). |
| **Goal Tracking & Progress Monitoring** | 3-Strong Evidence : Goal tracking and progress monitoring and thoroughly explained for each of the four SMART goals (9-12). Systems for progress monitoring for goals are clearly explained with monthly goal check-ins, mid-project benchmarks, what the team monitors monthly, corrective action triggers, and the team lead. |
| **Monitoring and Improving Academic Outcomes** | 3-Strong Evidence : The response affirms the use of a mutli-tiered system of supports (MTSS) to monitor and improve academic outcomes for all students. Key components of the program are outlined to include CFU's, common interim assessments, disaggregated data analysis, LASW protocols, and observation/feedback cycles for teachers (12-13). The response would benefit from a more comprehensive descriptions of the tiers of instruction and movement along the tiers to demonstrate capacity for an effective MTSS. The capacity interview revealed additional substantive details regarding the MTSS to provide evidence of capacity for monitoring and improving student outcomes. |
| **Identification of Underserved and Educationally Disadvantaged Student Needs** | 3-Strong Evidence : Identification of students for additional services is described to include steps for EL students, students with disabilities, and students with reading needs (13). Tiered supports for students are broadly outlined as they relate to literacy needs (13-14). Supports and services for students with IEP's are described to include case management and routine progress monitoring, co-planning between general education and special education staff, push-in services, and consistent classroom accommodation routines (14). Supports for English Learners are also appropriately described with specific strategies that reflect best practices (14). |

**Application Title:Monticello Academy West Point**
**Application's average score:**

| | Reviewer 3 |
|---|---|
| **Equitable and Inclusive Practices to support and address the identified needs of ALL students** | 3-Strong Evidence : The response affirms equitable and inclusive practices in instructional design and implementation systems, including the use of curriculum that supports these goals (15). The school utilizes walkthroughs and observation cycles that verify specific inclusive routines that are looked for in observations. Standard methods of family communication reflect equitable and inclusive practices (15). |
| **Family & Community Engagement** | 2-Moderate Evidence : The response affirms an active Parent Organization and schoolwide events such as fall carnival, jog-a-thon, and seasonal family activities. Volunteerism is suggested but not required of families (16). The opportunities described are broadly described and would benefit from greater specificity. |
| **Inclusive Decision-Making Opportunities** | 3-Strong Evidence : The response describes the use of a Parent Council which "directs spending of Land Trust funds, coordinates volunteer efforts, and provides input on school programming and family engagement priorities" (16). It is not clear, however, if this is a separate body from the "Parent Organization" mentioned in the previous section. This, however, was clearly explained in the capacity interview. Beginning, middle, and end-of-year surveys of parents are used to solicit ongoing feedback to refine events and communication (16). |
| **Pre-Planning Engagement and Community Buy-In** | 3-Strong Evidence : The response broadly yet adequately addresses the criteria, offering opportunities for pre-operational engagement for each expansion phase to include information sessions and school tours with opportunities for families to ask questions and provide input (16). |
| **Equitable Recruitment, Enrollment, and Retention** | 3-Strong Evidence : The response affirms standard and expected methods of outreach and communication to ensure equitable and inclusive enrollment opportunities. Strategies for retention of students are adequately described with specific examples (17). |
| **Projected Enrollment and Evidence of Demand** | 3-Strong Evidence : The applicant provides clear projections for grade level expansions based on existing demand as reflected by waitlists and ongoing applications (17). The response would benefit from a more comprehensive needs analysis to better describe the community served and expectations of future need; however, this criterion is adequately addressed in the subsequent section of the application. |

**Application Title:Monticello Academy West Point**
**Application's average score:**

| | Reviewer 3 |
|---|---|
| **Alignment to Local Needs and Access** | 3-Strong Evidence : The response offers a demographic comparison of the applicant to two district elementary schools located within a mile. The applicant services a disproportionately higher percentage of economically disadvantaged, Hispanic, multi-racial, and military-connected students (18). Regional housing growth is affirmed to support the feasibility of the school's enrollment projections over the grant period. |
| **Transportation Strategy and Equity** | 3-Strong Evidence : The applicant intends to use CSP funds to purchase two full-size school buses with high passenger capacity to provide transportation to families at no cost (19). The grant will also support a dedicated Transportation Lead position. Accessibility and transportation for students with an IEP or 504 will also be provided. The response would benefit from a discussion of the current transportation operations of the school and how the planned purchase of the two new buses fits into the existing system, but the plan appears sound and reasonable given the size of the expansion. The capacity interview presented robust transportation planning as a key component of the proposed expansion. |
| **Access and Logistics** | 3-Strong Evidence : The response affirms a system, supported by in-kind expertise advice from a transportation manager of a local school district, whereby ridership is assigned through a transportation request process that collects information and prioritizes seats for students with the greatest transportation needs (19). The response affirms planning to prevent transportation from becoming a barrier to access and provides details on the two routes aligned to enrollment need and access barriers (20). |
| **Community Notification and Recruitment** | 3-Strong Evidence : Standard and expected methods of communication regarding the lottery are described. The applicant lists permitted enrollment preferences (22). A random selection method is described and the process for notification is included with required steps is provided. |
| **Lottery Implementation, Waitlist, and Enrollment** | 2-Moderate Evidence : A random lottery is affirmed and adequately described (22). The response would benefit from greater details on waitlist management procedures to ensure equal oppoprtunity for selection. |
| **Board Member Information** | 2-Moderate Evidence : Board member resumes and other required pieces of information were not located. The capacity interview, however, presented evidence of a high-capacity board with areas of expertise relevant to effective charter school oversight. |

**Application Title:Monticello Academy West Point**

**Application's average score:**

| | Reviewer 3 |
|---|---|
| **Project Manager, Support Team, and Partner Organizations / ESPs** | 2-Moderate Evidence : The response does not identify specific individuals by name who will fill project management roles, but does identify the Executive Director of the school as the Project Manager accountable for the goals of the project, along with a team that includes appropriate responsibility for the Business Manager, Director of Operations, and Campus Director (24). Individual expertise of these individuals is not provided. Structures for progress monitoring indicate that goal teams will meet monthly, but additional substantive detail is not provided to address the criterion of a structured plan for how the project will be managed within budget and timeline constraints. The capacity interview revealed greater details on project management to indicate proper management and oversight of the expansion, including facilities, curriculum, budgeting, transportation, and procurement. |
| **Charter School Autonomy and Authorizer Relationship** | 3-Strong Evidence : The Utah State Charter Board is identified as the authorizer and the school affirms "substantial autonomy over academic programming, staffing, budgeting, and scheduling" (24). The response provides broadly stated yet adequate examples of how the school's autonomy supports effective implementation. Accountability to the authorizer is affirmed through required reporting, monitoring, audits, and performance expectations (24). |
| **Quality Control and Accountability** | 3-Strong Evidence : Quality control mechansims are descred in categories of academic accountability, financial audits and internal audit oversight, operational oversight, and internal controls and procurement compliance (25). |
| **Comprehensive Budget Narrative** | 2-Moderate Evidence : A budget narrative is clearly aligned to the project as a whole and funding priorities. Expenditures are categorized under Supplies, Equipment, Personnel and Fringe Benefits, Contractual, and Facilities. Sub-categories of expenditures for each of these is provided, aligned to the narrative, but not sufficiently itemized. The budget narrative would benefit from greater itemization and specificity to better meet the criterion of a clear and detailed narrative. |
| **Planning vs. Implementation Phases** | 2-Moderate Evidence : Planning and implementation are separated in the budget narrative by total expenditures only. The budget narrative does not provide sufficient detail or itemization to meet the criterion of a clear, complete distinction between planning and implementation phases with separate line items and detailed narrative descriptions. Separate line items are found within the budget itself that are aligned with the project narrative and funding priorities. |
| **Personnel Costs** | 2-Moderate Evidence : There are questions of allowability on CSP-funded personnel costs with requests for funding the essential role of the Junior High Director in part over the course of the grant before it is absorbed into the operational budget (26). The roles of the Junior High Director, Marketing & Communications Director, and Transportation Lead are not explained in substantive detail relative to the funding amounts requested. These positions were better explained in the capacity interview than what was provided in the written application. |
| **Accountability for Funds** | 2-Moderate Evidence : Accountability for funds is broadly affirmed and explained. The response would benefit from greater specificity regarding internal financial controls to maintain the financial integrity of the project (26). |

**Application Title:Monticello Academy West Point**
**Application's average score:**

| | Reviewer 3 |
|---|---|
| **Post-Grant Sustainability** | 2-Moderate Evidence : Sustainability is broadly affirmed with conservative modeling and decreased reliance on the CSP over the grant period with costs being transitioned to the operational budget as enrollment increases (26). The response would benefit from greater specificity regarding the necessary costs that will need to be absorbed and the adequacy of the enrollment and projected revenue to support these costs. |
| **Innovative Charter Model** | 1-Evidence Provided: An innovative charter model is adequately described with key features provided and distinguishing features. |
| **High-Quality High School Programs** | 1-Evidence Provided: The expansion will include grade 9 and credit-bearing courses. The programming described meets the criteria for high-quality. |
| **Meeting Rural Needs** | 0-No Evidence : N/A |
| **Promotion of Educator and Community-Centered Models** | 1-Evidence Provided: Educator-centered practices are described to include distributed teacher leadership, teacher-driven improvement and curriculum refinement, embedded professional learning communities, and job-embedded coaching and development (28). Community-centered practices are also described in appropriate detail (29). |
| **Charter School/Traditional Public School Collaboration** | 1-Evidence Provided: A collaboration with Syracuse High School is affirmed to strengthen vertical alignment and prepare students for success in high school (29). |