



OGDEN PREPARATORY ACADEMY

Ogden Preparatory Academy

OPA Board of Directors Meeting

Date and Time

Thursday May 19, 2022 at 4:30 PM MDT

Location

1435 Lincoln Avenue
Ogden UT 84404

VISION: Ogden Preparatory Academy's vision is to create a positive, nurturing environment for students to grow and learn as they develop the skills necessary to become tomorrow's leaders. Through high academic expectations and experiences, bilingual exposure, leadership roles and commitment to community, OPA students will gain confidence and a sense of self worth that will prepare them to face the challenges in a competitive world.

Agenda

	Purpose	Presenter	Time
I. Opening Items			4:30 PM
A. Record Attendance		Stefanie Zwygart	1 m
B. Call the Meeting to Order		Stefanie Zwygart	1 m
C. Approve Minutes	Approve Minutes	Stefanie Zwygart	1 m
Approve minutes for OPA Board of Directors Meeting on April 14, 2022			
D. Opportunity for Public Input	Discuss	Stefanie Zwygart	5 m
E. Consent Calendar	Vote	Stefanie Zwygart	5 m
1. Calendar modification.			
1. Moved registration to August 2, so the principals may attend the Gang conference and be here to support families at registration.			
2. Summer PD Expenses			
1. AVID Conference			
1. Registration: 7 people at \$875 for \$6,125			
2. Hotel: \$8,828.24			
3. Airfare: \$2,401.20			
2. Safe and Civil Schools Conference:			
1. Registration: 10 people at \$1,200 each for \$12,000			
2. Hotel: \$8,200			
3. Airfare: \$3,259.80			

	Purpose	Presenter	Time
3. Per Diem (all): \$5,772			

II. Finance 4:43 PM

- | | | | |
|--|---------|------------------|------|
| A. Financial Review | Discuss | Spencer Adams | 5 m |
| B. FY22 Final Budget Approval | Vote | Debbie Deem | 5 m |
| C. FY23 Initial Budget Approval | Vote | Stefanie Zwygart | 5 m |
| D. Curriculum Discussion | Vote | Debbie Deem | 10 m |

1. Wonders supplement materials: each year grade level teams request Wonders consumable materials. The total amount is typically around \$8,000; however, we won't have an exact quote until the requests are finalized.
2. History Curriculum, 7-9: the history textbooks are have are outdated. We are researching options for updating the curriculum. We are finalizing the selection and quantity, and then we can get a final quote for the purchase. The purchase will not exceed \$20,000.

Request that he Board approves the Admin team to make these purchase decisions, and the exact amounts be ratified in a later Board meeting.

- | | | | |
|-----------------------------------|------|-------------|-----|
| E. Kitchen Equipment | Vote | Debbie Deem | 5 m |
| F. Teacher Device Purchase | Vote | Debbie Deem | 5 m |

36 i-pads at \$299 each
36 i-pad keyboards at \$149 each

\$16,128 total

10 Macbook Airs @ \$799

\$7,990 Total

- | | | | |
|---|------|-------------|-----|
| G. Employee Retention Tax Credit RFP | Vote | Debbie Deem | 5 m |
| H. Medicaid Support System | Vote | Debbie Deem | 5 m |

Medicaid services and billing provides payment for specific Special Education related services as outlined in Individualized Education Plans.

- | | | | |
|---------------------------------|------|-------------|------|
| I. Maintenance Purchases | Vote | Debbie Deem | 15 m |
|---------------------------------|------|-------------|------|

- Painting: up to \$22,000 (hallways, stairwells, 7 classrooms)
- Paint: up to \$7,000
- Carpet; up to \$25,000 (7 classrooms)
- Lighting: up to \$37,000 (Elementary)

III. Executive Session 5:43 PM

- | | | | |
|--|------|------------------|------|
| A. Enter Closed Session | Vote | Stefanie Zwygart | 5 m |
| To protect the privacy of an individual. | | | |
| B. Exit Closed Session | Vote | Stefanie Zwygart | 5 m |
| C. Construction Approvals | Vote | Debbie Deem | 10 m |

	Purpose	Presenter	Time
<ol style="list-style-type: none"> 1. Construction decision. 2. Delegate authority to act and ratify. 3. Underwriter RFP. 			
IV. Administrative Report			6:03 PM
A. Administrative Board Report Discuss Administrative Team OPA Libraries Annual Report: https://sites.google.com/ogdenprep.org/opalibrariesannualreport2021-2/home			15 m
B. Speech Therapy Agreement Vote Debbie Deem			5 m
V. Policies			6:23 PM
A. Policy Updates Vote Stephanie Mathers			5 m
<ol style="list-style-type: none"> 1. Archive the following; content from these policies is being addressed in other policies such as Data Governance, and Social Media: <ol style="list-style-type: none"> 1. 2.04 Student Education Records Management 2. 6.04 Electronic Resources Policy 3. 6.15 Social Networking Policy 2. Revise the following: <ol style="list-style-type: none"> 1. 3.09.POL Audit Policy 			
VI. Other Business			6:28 PM
A. Required Trainings FYI Annual Trainings for Board Members: Open Meetings Act - Annually (completed: Bill, Sara, Molly, Jessica) School Land Trust - Annually (completed: Stefanie, Bill, Jessica, Sara, Molly) State Auditor Trainings - only once per term. (Completed: Tyler, Sara, Molly, Jessica) USBE Internal Audit Trainings - only once (completed: Stefanie, Bill, Tyler, Molly, Sara)			
B. Housekeeping Discuss Stefanie Zwygart Proposed Meeting Schedule:			5 m
<ul style="list-style-type: none"> • June - if we need a quick electronic meeting, when would be a good day? • July 21 • August 18 • September 8 • October 13 • November 10 • January 12 • February 9 • March 9 • April 13 • May 18 			
VII. Closing Items			6:33 PM
A. Adjourn Meeting FYI Stefanie Zwygart			

Coversheet

Approve Minutes

Section: I. Opening Items
Item: C. Approve Minutes
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for OPA Board of Directors Meeting on April 14, 2022

APPROVED



**OGDEN PREPARATORY
ACADEMY**

Ogden Preparatory Academy

Minutes

OPA Board of Directors Meeting

Date and Time

Thursday April 14, 2022 at 4:30 PM

Location

1435 Lincoln Avenue
Ogden UT 84404

VISION: Ogden Preparatory Academy's vision is to create a positive, nurturing environment for students to grow and learn as they develop the skills necessary to become tomorrow's leaders. Through high academic expectations and experiences, bilingual exposure, leadership roles and commitment to community, OPA students will gain confidence and a sense of self worth that will prepare them to face the challenges in a competitive world.

Directors Present

M. Swenson, M. Ward, S. Mejeur, S. Zwycart, T. D'Hulst

Directors Absent

J. Howell, W. Davis

Ex Officio Members Present

A. Perez, D. Deem, K. Kennington, S. Lopez, S. Mathers (remote)

Non Voting Members Present

A. Perez, D. Deem, K. Kennington, S. Lopez, S. Mathers (remote)

Guests Present

Aimee Melton, E. Callison, S. Adams, S. Wright, T. Young

I. Opening Items

A. Record Attendance

B.

Call the Meeting to Order

S. Zwygart called a meeting of the board of directors of Ogden Preparatory Academy to order on Thursday Apr 14, 2022 at 4:32 PM.

C. Approve Minutes

T. D'Hulst made a motion to approve the minutes from OPA Board of Directors Meeting on 03-10-22.

M. Ward seconded the motion.

The board **VOTED** to approve the motion.

D. Approve Minutes

T. D'Hulst made a motion to approve the minutes from OPA Board of Directors Meeting - Electronic on 03-18-22.

M. Ward seconded the motion.

The board **VOTED** to approve the motion.

E. Opportunity for Public Input

Question: Is the slide going to be fixed?

Yes, it is on it's way.

F. Consent Calendar

T. D'Hulst made a motion to Ratify the Consent Calendar.

S. Mejeur seconded the motion.

The board **VOTED** to approve the motion.

II. Executive Session

A. Enter Closed Session

S. Mejeur made a motion to Protect the privacy of an individual.

T. D'Hulst seconded the motion.

The board **VOTED** to approve the motion.

Roll Call

M. Ward	Aye
J. Howell	Absent
W. Davis	Absent
M. Swenson	Aye
S. Zwygart	Aye
S. Mejeur	Aye
T. D'Hulst	Aye

B. Exit Closed Session

T. D'Hulst made a motion to Exit Closed Session.

S. Mejeur seconded the motion.

The board **VOTED** to approve the motion.

Roll Call

T. D'Hulst	Aye
W. Davis	Absent
M. Ward	Aye
J. Howell	Absent

Roll Call

S. Zwycart Aye

S. Mejeur Aye

M. Swenson Aye

C. Student Discipline

T. D'Hulst made a motion to Approve what discussed in closed session.

M. Ward seconded the motion.

The board **VOTED** to approve the motion.

D. Director Evaluation, Salary, and Bonus

T. D'Hulst made a motion to approve that was discussed in closed session.

S. Mejeur seconded the motion.

The board **VOTED** to approve the motion.

III. Finance

A. Financial Review

Spencer Adams presented.

Discussed Revenue

- Request funding early enough so we receive it before the fiscal year ends.

No questions were discussed.

B. Red Apple Finance Agreement

S. Mejeur made a motion to Approve the Red Apple agreement.

T. D'Hulst seconded the motion.

The board **VOTED** to approve the motion.

IV. Administrative Report

A. Administrative Board Report

Went through highlights of the administrative report.

- Meeting with contractors for the new building
- Family Activity coming up
 - Family Pictures
 - Fun
 - Food
- May 13 Virtual Day - Staff recognition and end of year lunch

B. Health Curriculum Approval

T. D'Hulst made a motion to Approve the Health Curriculum.

M. Ward seconded the motion.

Essential Health Skills for Middle School. This is a state approved curriculum that we use.

The board **VOTED** to approve the motion.

V. Policies

A. Policy Updates

T. D'Hulst made a motion to Approve all the policies as outlined.

M. Ward seconded the motion.

Went through and discussed the policy updates.

- New: Library Collections Policy.

The board **VOTED** to approve the motion.

VI. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 6:30 PM.

Respectfully Submitted,
S. Zwygart

Coversheet

Consent Calendar

Section:	I. Opening Items
Item:	E. Consent Calendar
Purpose:	Vote
Submitted by:	
Related Material:	FY23 OPA School Calendar.pdf



Ogden Preparatory Academy

2022-2023

School Year Calendar

Elementary School (K-6)
1415 Lincoln Avenue
Ogden UT 84404
801.627.2066
801.394.2267 (fax)

Junior High (7-9)
1435 Lincoln Avenue
Ogden UT 84404
801.627.3066
801.395.2267 (fax)

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

OPA Mission
To provide a challenging curriculum where **academic excellence, character development, and individual growth** are nurtured in a safe and happy environment that involves the active participation of students, teachers, parents, and community members.

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

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

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

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

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

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

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

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

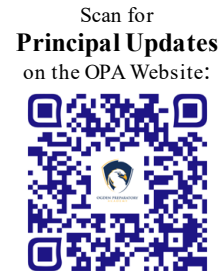
April 23						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

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

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

School Hours
School Begins: 8:05 am
School Ends:
Regular Day: 3:00 pm
Minimum Day: 12:45 pm

OPA Website:
www.ogdenprep.org



	New Teacher Orientation
	Report Cards Issued
	Minimum Day
	Minimum Day/\$1 Free Dress
	Leader in Me Spirit Day
	Registration, Aug 2; 9:00 am to 7:00 pm
	Term Dates
August 15	Back to School Night, Grades 1-6
August 16-19	First week of school 1st-9th grades/ Minimum Days
August 16-18	Kindergarten Testing
August 16	School Starts/Term 1 Begins
Aug 22-26	Kindergarten First Week/Min. Days
October 24	Term 2 Begins (Term 1 reports sent 10/27)
January 17	Term 3 Begins (Term 2 reports sent 01/19)
March 20	Term 4 Begins (Term 3 reports sent 03/23)
May 26	Last Day of School
	No School
September 5	Labor Day
October 20-21	Fall Break
November 21-25	Thanksgiving Break
December 19-30	Winter Break
January 16	MLK Day
February 20	Presidents' Day
March 17	Student Holiday
April 3-7	Spring Break
	Virtual Learning Days (no in-person learning)
October 14	March 10
January 13	May 12
	Teacher Professional Development
August 8-11	P.D. (student holiday)
October 24	P.D. (student holiday)
March 16	P.D. (student holiday)
	Family-Teacher Conferences
	Thursday: 1 pm - 7 pm; Friday 8 am - 12 pm
October 6-7	Family-Teacher Conferences
February 16-17	Family-Teacher Conferences
April 27	Family-Teacher Conferences: 4 pm to 6 pm

Fridays of each week are minimum days for students with Professional Development sessions for teachers, unless otherwise noted.

Coversheet

Financial Review

Section:	II. Finance
Item:	A. Financial Review
Purpose:	Discuss
Submitted by:	
Related Material:	Budget Summary_April 2022.pdf Budget Detail_April 2022-Proposed Final Budget.pdf



Ogden Preparatory Academy

Financial Summary

As of 4/30/2022



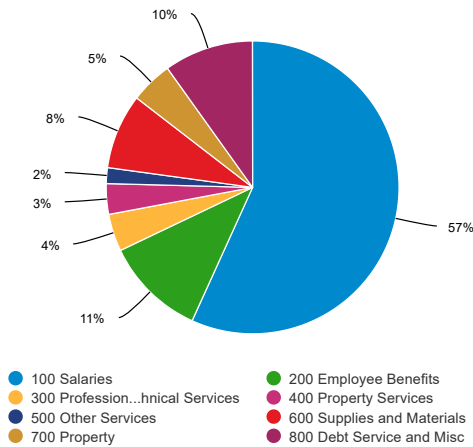
Financial Summary

Category	YTD Amount	Total Budget	Total Forecast	% Target	% Forecast
Revenue (3 School categories)					
1000 Local Revenue	\$75,976	\$126,316	\$89,050	83.3%	85.3%
3000 State Revenue	\$7,494,491	\$8,947,308	\$9,026,676	83.3%	83.0%
4000 Federal Revenue	\$869,614	\$1,192,426	\$2,039,564	83.3%	42.6%
TOT	\$8,440,081	\$10,266,050	\$11,155,290		
Expense (8 School categories)					
100 Salaries	-\$4,956,653	-\$5,769,482	-\$6,051,912	83.3%	81.9%
200 Employee Benefits	-\$962,506	-\$1,187,145	-\$1,187,431	83.3%	81.1%
300 Professional and Technical Services	-\$329,222	-\$410,117	-\$439,641	83.3%	74.9%
400 Property Services	-\$275,284	-\$301,800	-\$359,800	83.3%	76.5%
500 Other Services	-\$108,040	-\$232,878	-\$185,338	83.3%	58.3%
600 Supplies and Materials	-\$649,405	-\$826,245	-\$884,809	83.3%	73.4%
700 Property	-\$361,081	-\$195,000	-\$496,000	83.3%	72.8%
800 Debt Service and Misc	-\$815,061	-\$1,027,842	-\$1,052,842	83.3%	77.4%
TOT	-\$8,457,253	-\$9,950,509	-\$10,657,773		
TOT	-\$17,172	\$315,541	\$497,517		

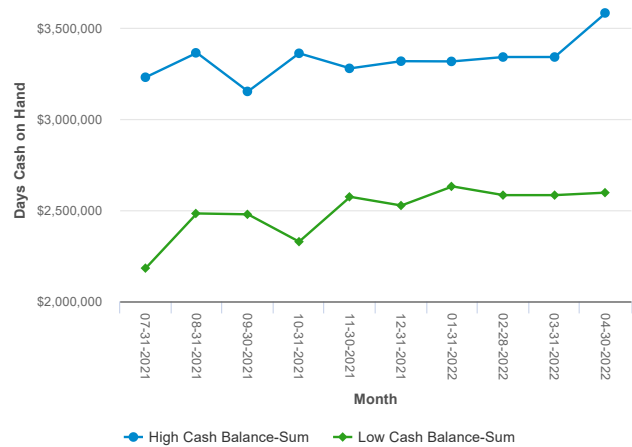
Financial Metrics

Financial Metric	Covenant	Target	Forecast
Net Income		327,649	497,518
Operating Margin		3.0	4.46
Debt Service Ratio	1.10	1.51	1.51
Unrestricted Days Cash	30	100	112
% Building		20%	8.8
Ending Cash Balance			3,423,944

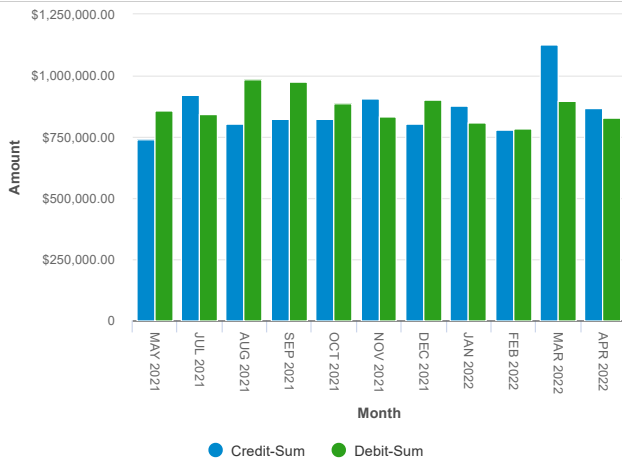
Expense Distribution



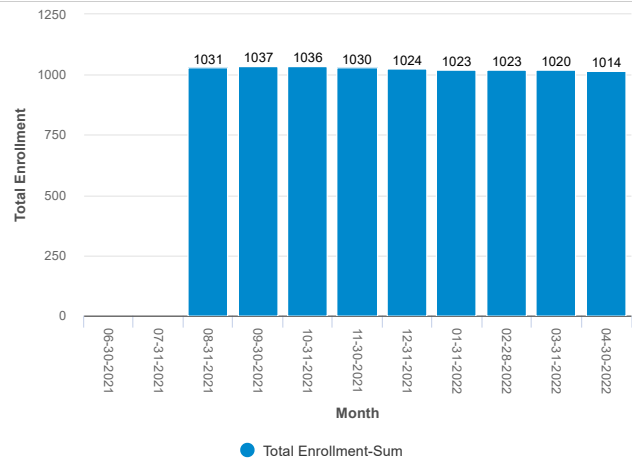
Cash Balance



Revenue vs Expenses



Enrollment Trend



Finance Manager : School Budget | Current Yr Budget

Current Yr Budget

Budget Name	PY Amount	YTD Amount	Budget	Variance	Forecast	% Target	% of Forecast
Ogden Preparatory - Revenue - 1000 Local Revenue - 85.3% (12 School budgets)							
1510 Interest on Investments	\$21,633	\$13,352	\$25,000	-\$9,000	\$16,000	83.3%	83.4%
1600 Lunch Program (Students & Adults)	\$5,664	\$4,280	\$0	\$4,280	\$4,280	83.3%	100.0%
1710 Student Sales	\$11,645	\$8,828	\$15,000	-\$6,172	\$8,828	83.3%	100.0%
1710 OPAPO	\$16,023		\$0	\$0	\$0	83.3%	
1710 Art Expo			\$1,500	\$920	\$2,420	83.3%	
1740 Student Fees	\$21,369	\$24,229	\$14,816	\$9,413	\$24,229	83.3%	100.0%
1741 Trips		\$11,992	\$40,000	-\$20,000	\$20,000	83.3%	60.0%
1790 Sports	-\$35		\$3,000	-\$3,000	\$0	83.3%	
1910 Rental of Facility	\$360	\$975	\$0	\$975	\$975	83.3%	100.0%
1920 Contributions & Donations	\$5,270	\$7,950	\$2,000	\$5,950	\$7,950	83.3%	100.0%
1920 Fundraising			\$25,000	-\$25,000	\$0	83.3%	
1990 Miscellaneous	\$2,222	\$4,368	\$0	\$4,368	\$4,368	83.3%	100.0%
TOT	\$84,150	\$75,976	\$126,316	-\$37,266	\$89,050		
Ogden Preparatory - Revenue - 3000 State Revenue - 83.0% (33 School budgets)							
0.3005 Regular School Prgm K	\$184,825	\$168,330	\$195,464	\$6,210	\$201,674	83.3%	83.5%
0.301 Regular School Prgm 1-12	\$3,197,699	\$2,766,710	\$3,381,771	-\$72,244	\$3,309,527	83.3%	83.6%
0.302 Professional Staff	\$257,503	\$223,491	\$273,195	-\$5,840	\$267,355	83.3%	83.6%
0.32 Charter School Base Amount	\$15,000	\$85,421	\$100,399	\$2,106	\$102,505	83.3%	83.3%
31.1205 Special Education -- Add-On	\$559,466	\$493,838	\$592,605	\$0	\$592,605	83.3%	83.3%
31.121 Special Education -- Self-Contained	\$50,304	\$42,551	\$51,062	\$0	\$51,062	83.3%	83.3%
31.122 Special Education -- Extended Year	\$4,234	\$3,739	\$4,466	\$0	\$4,466	83.3%	83.7%
31.1225 Special Education - Impact Aid	\$10,242	\$9,415	\$11,230	\$0	\$11,230	83.3%	83.8%
31.1278 Special Education- Extended Year Stipend	\$5,290	\$35,587	\$0	\$35,587	\$35,587	83.3%	100.0%
31.5201 Class Size Reduction K-8	\$302,060	\$264,163	\$323,748	-\$7,902	\$315,846	83.3%	83.6%
31.5344 Enhancement for At-risk students	\$94,001	\$141,092	\$169,310	\$0	\$169,310	83.3%	83.3%
31.5695 Early Intervention General	\$30,000		\$90,000	-\$90,000	\$0	83.3%	
32.5658 COVID 19 Stipend	\$172,008		\$0	\$0	\$0	83.3%	
32.5665 Grow Your Own Teacher & Counselor		\$47,040	\$0	\$11,000	\$11,000	83.3%	427.6%
33.5331 Gifted and Talented	\$7,599	\$7,051	\$7,169	\$1,292	\$8,461	83.3%	83.3%
33.5641 Early Intervention	\$90,000	\$102,210	\$30,000	\$92,652	\$122,652	83.3%	83.3%
33.5805 Early Literacy (K-3)	\$57,567	\$62,567	\$62,245	\$12,836	\$75,081	83.3%	83.3%
34.5662 Outdoor Recreation Grant			\$0	\$10,000	\$10,000	83.3%	
34.5807 TSSP (Teacher Salary Supplement Prgm)	\$8,354	\$8,034	\$0	\$8,034	\$8,034	83.3%	100.0%
34.5868 Teacher Supplies & Materials	\$9,567	\$9,958	\$9,382	\$576	\$9,958	83.3%	100.0%
34.5876 Charter School Local Replacement	\$2,661,918	\$2,341,510	\$2,809,040	-\$8,103	\$2,800,937	83.3%	83.6%

Budget Name	PY Amount	YTD Amount	Budget	Variance	Forecast	% Target	% of Forecast
34.5876 Educator Salary Adjustment	\$313,169	\$274,734	\$313,169	\$16,512	\$329,681	83.3%	83.3%
34.5911 ELL Software	\$13,500		\$0	\$41,833	\$41,833	83.3%	
35.542 School Land Trust	\$133,964	\$138,078	\$136,897	\$1,181	\$138,078	83.3%	100.0%
35.5655 Digital Teaching & Learning	\$61,465		\$64,851	\$0	\$64,851	83.3%	
35.5666 Professional Learning		\$6,137	\$0	\$7,365	\$7,365	83.3%	83.3%
35.5678 TSSA	\$160,585	\$156,166	\$188,095	-\$1,417	\$186,678	83.3%	83.7%
35.5679 Student Health & Counseling	\$16,774	\$10,750	\$57,137	\$0	\$57,137	83.3%	18.8%
35.581 Library Books & Electronic Res	\$1,095	\$899	\$1,073	\$3	\$1,076	83.3%	83.5%
38.5644 STEM Endorsement Center	\$11,146		\$0	\$0	\$0	83.3%	
38.5672 Substance Abuse		\$2,333	\$0	\$0	\$0	83.3%	
38.5674 Suicide Prevention	\$1,066	\$1,000	\$0	\$1,000	\$1,000	83.3%	100.0%
38.807 Liquor Tax (Lunch Program)	\$84,746	\$91,687	\$75,000	\$16,687	\$91,687	83.3%	100.0%
TOT	\$8,515,146	\$7,494,491	\$8,947,308	\$79,368	\$9,026,676		
Ogden Preparatory - Revenue - 4000 Federal Revenue - 42.6% (25 School budgets)							
42.721 ESSER CARES	\$124,503	\$1,600	\$0	\$1,600	\$1,600	83.3%	100.0%
42.7215 ESSER II			\$330,000	\$318,979	\$648,979	83.3%	
42.722 GEER Funding	\$34,564		\$0	\$0	\$0	83.3%	
42.7225 ESSER III ARPA			\$0	\$250,000	\$250,000	83.3%	
42.723 GEERS II			\$0	\$20,204	\$20,204	83.3%	
45.728 PPE	\$8,255		\$0	\$0	\$0	83.3%	
45.728 Corona Relief Funds	\$25,959		\$0	\$0	\$0	83.3%	
45.8079 After School Program		\$4,643		\$4,643	\$4,643	83.3%	100.0%
45.8081 Emergency Operating Funds		\$3,972	\$0	\$3,972	\$3,972	83.3%	100.0%
47.729 CARES Wifi	\$87,103		\$0	\$0	\$0	83.3%	
47.729 Weber CARES	\$62,000		\$0	\$0	\$0	83.3%	
48.7801 Title I - Remedial Services	\$238,405	\$125,986	\$221,696	\$0	\$221,696	83.3%	56.8%
48.786 Title II	\$49,987	\$37,285	\$36,535	\$750	\$37,285	83.3%	100.0%
48.786 Title II School Leader (MAPP)		\$14,848	\$0	\$14,848	\$14,848	83.3%	100.0%
48.788 Title III A - English Lang Acq	\$21,809	\$20,033	\$18,962	\$1,071	\$20,033	83.3%	100.0%
48.7905 Supporting Effective Instruction	\$9,063		\$0	\$0	\$0	83.3%	
4522 IDEA Preschool	\$2,995		\$2,706	\$781	\$3,487	83.3%	
4522 IDEA Preschool ARP				\$3,322	\$3,322	83.3%	
4524 IDEA	\$159,570	\$89,380	\$151,827	\$6,791	\$158,618	83.3%	56.3%
4524 IDEA ARP				\$43,226	\$43,226	83.3%	
4526 MTSS Grant	\$6,000	\$6,000	\$6,000	\$0	\$6,000	83.3%	100.0%
4560 Kitchen Equipment Grant	\$43,418		\$0	\$26,560	\$26,560	83.3%	
4560 National School Lunch Program	\$37,480	\$40,477	\$49,700	\$0	\$49,700	83.3%	81.4%
4560 NSLP - Free & Reduced	\$280,304	\$441,631	\$300,000	\$141,631	\$441,631	83.3%	100.0%
4560 NSLP - Breakfast	\$82,980	\$83,760	\$75,000	\$8,760	\$83,760	83.3%	100.0%
TOT	\$1,274,394	\$869,614	\$1,192,426	\$847,138	\$2,039,564		

Budget Name	PY Amount	YTD Amount	Budget	Variance	Forecast	% Target	% of Forecast
Ogden Preparatory - Expense - 100 Salaries - 81.9% (19 School budgets)							
121 Principals and Assistants	-\$460,370	-\$497,688	-\$516,355	-\$108,033	-\$624,388	83.3%	79.7%
131 Teachers	-\$2,754,137	-\$2,582,351	-\$3,088,985	\$20,241	-\$3,068,744	83.3%	84.2%
132 PTO Cash out	\$2,762	-\$13,523	-\$15,000	-\$2,000	-\$17,000	83.3%	79.5%
132 Substitute Teachers	-\$39,751	-\$49,766	-\$45,000	-\$12,524	-\$57,524	83.3%	86.5%
133 Special Education Director & Teachers	-\$294,938	-\$303,695	-\$389,590	-\$1,524	-\$391,114	83.3%	77.6%
134 Stipends (Sports, other)	-\$119,672	-\$85,773	-\$65,000	-\$56,542	-\$121,542	83.3%	70.6%
134 End of Year Bonus / Returning Bonus	-\$202,409	-\$26,520	-\$45,000	\$3,000	-\$42,000	83.3%	63.1%
134 Christmas Bonus	-\$53,979	-\$56,662	-\$53,979	-\$2,683	-\$56,662	83.3%	100.0%
142 Counselor	-\$101,917	-\$94,667	-\$114,000	\$0	-\$114,000	83.3%	83.0%
145 Librarian	-\$118,245	-\$112,141	-\$135,505	\$0	-\$135,505	83.3%	82.8%
152 Secretarial & Clerical	-\$175,099	-\$171,974	-\$230,500	\$4,666	-\$225,834	83.3%	76.2%
161 General Ed TA	-\$47,736	-\$129,797	-\$28,214	-\$130,543	-\$158,757	83.3%	81.8%
161.1 ESSER II Aides			-\$61,950	\$61,950		83.3%	
162 Special Education TA	-\$356,780	-\$331,378	-\$403,956	-\$4,937	-\$408,893	83.3%	81.0%
163 Title I TA	-\$120,043	-\$102,986	-\$152,611	-\$7,261	-\$159,872	83.3%	64.4%
164 Early Literacy (K-3) TA	-\$64,403	-\$57,450	-\$71,552	\$1,133	-\$70,419	83.3%	81.6%
165 Land Trust TA	-\$66,118	-\$86,270	-\$51,109	-\$52,121	-\$103,230	83.3%	83.6%
166 Early Intervention TA	-\$6,695	-\$6,071	-\$15,488	\$6,461	-\$9,027	83.3%	67.3%
191 Food Service	-\$229,331	-\$247,943	-\$285,688	-\$1,713	-\$287,401	83.3%	86.3%
TOT	-\$5,208,861	-\$4,956,653	-\$5,769,482	-\$282,430	-\$6,051,912		
Ogden Preparatory - Expense - 200 Employee Benefits - 81.1% (7 School budgets)							
210 Retirement	-\$130,360	-\$115,651	-\$160,000	\$0	-\$160,000	83.3%	72.3%
220 Social Security	-\$343,926	-\$356,570	-\$441,365	\$0	-\$441,365	83.3%	80.8%
241 Group Insurance	-\$350,819	-\$348,470	-\$419,566	\$0	-\$419,566	83.3%	83.1%
241 Health Stipend	-\$23,178		\$0	\$0	\$0	83.3%	
242 Waiver Benefit	-\$109,600	-\$113,729	-\$112,500	-\$18,000	-\$130,500	83.3%	87.1%
270 Worker's Compensation Fund	-\$30,748	-\$20,183	-\$38,714	\$13,714	-\$25,000	83.3%	80.7%
280 Unemployment Insurance	-\$7,224	-\$7,903	-\$15,000	\$4,000	-\$11,000	83.3%	71.8%
TOT	-\$995,855	-\$962,506	-\$1,187,145	-\$286	-\$1,187,431		
Ogden Preparatory - Expense - 300 Professional and Technical Services - 74.9% (9 School budgets)							
320 Mental Health (Weber Health Services)	-\$16,774	-\$19,609	-\$57,137	\$0	-\$57,137	83.3%	34.3%
321 Crossing Guard Services (Ogden Police Dept)			\$0	\$0	\$0	83.3%	
323 Speech Therapy	-\$124,957	-\$106,670	-\$124,680	-\$3,324	-\$128,004	83.3%	83.3%
323 Psychology / Behavior	-\$10,292	-\$5,467	-\$12,000	\$6,300	-\$5,700	83.3%	95.9%
330 Employee Training & Development	-\$21,207	-\$53,424	-\$45,000	-\$30,000	-\$75,000	83.3%	71.2%
340 Legal	-\$490	-\$88	-\$15,000	\$12,000	-\$3,000	83.3%	2.9%
350 Business Manager Services	-\$77,000	-\$70,000	-\$84,000	\$0	-\$84,000	83.3%	83.3%
352 Audit Services	-\$20,100	-\$21,800	-\$22,300	\$0	-\$22,300	83.3%	97.8%

Budget Name	PY Amount	YTD Amount	Budget	Variance	Forecast	% Target	% of Forecast
355 IT Services (ETS Monthly)	-\$37,662	-\$52,165	-\$50,000	-\$14,500	-\$64,500	83.3%	80.9%
TOT	-\$308,483	-\$329,222	-\$410,117	-\$29,524	-\$439,641		
Ogden Preparatory - Expense - 400 Property Services - 76.5% (5 School budgets)							
410 Garbage / Sewer / Water	-\$48,276	-\$33,010	-\$60,000	\$15,000	-\$45,000	83.3%	73.4%
430 Repairs / Maintenance / Monitoring	-\$100,621	-\$157,303	-\$135,000	-\$73,000	-\$208,000	83.3%	75.6%
433 Cleaning & Custodial Services	-\$65,307	-\$59,370	-\$72,000	\$0	-\$72,000	83.3%	82.5%
435 Lawn Care & Snow Removal	-\$21,310	-\$21,794	-\$30,000	\$0	-\$30,000	83.3%	72.6%
443 Lease of Copy Machines	-\$9,909	-\$3,807	-\$4,800	\$0	-\$4,800	83.3%	79.3%
TOT	-\$245,423	-\$275,284	-\$301,800	-\$58,000	-\$359,800		
Ogden Preparatory - Expense - 500 Other Services - 58.3% (10 School budgets)							
520 Property & Liability Insurances	-\$33,637	-\$37,526	-\$37,000	-\$6,460	-\$43,460	83.3%	86.3%
530 Communication (Phone & Internet)	-\$5,389	-\$5,139	-\$6,178	\$0	-\$6,178	83.3%	83.2%
540 Marketing	-\$8,830	-\$5,084	-\$10,000	\$3,000	-\$7,000	83.3%	72.6%
542 Board Expenses	-\$6,837	-\$312	-\$8,000	\$0	-\$8,000	83.3%	3.9%
580 Travel / Per Diem		-\$12,478	-\$25,000	-\$10,000	-\$35,000	83.3%	35.7%
590 Field Trips (Bussing & Entrance Fees)	-\$614	-\$12,799	-\$40,000	\$6,000	-\$34,000	83.3%	37.6%
590 Student Activities - Aguilas Bussing			-\$1,200	\$0	-\$1,200	83.3%	
591 Sports (Bussing, Fees, Tri, Weight Training)	-\$1,633	-\$15,898	-\$20,000	\$3,000	-\$17,000	83.3%	93.5%
592 Trips		-\$16,507	-\$81,000	\$51,000	-\$30,000	83.3%	55.0%
593 Clubs	-\$1,494	-\$2,298	-\$4,500	\$1,000	-\$3,500	83.3%	65.7%
TOT	-\$58,435	-\$108,040	-\$232,878	\$47,540	-\$185,338		
Ogden Preparatory - Expense - 600 Supplies and Materials - 73.4% (20 School budgets)							
611 SpEd Supplies	-\$10,557	-\$7,164	-\$7,000	-\$300	-\$7,300	83.3%	98.1%
611 Classroom/ Legislative Supplies	-\$33,014	-\$29,172	-\$43,000	\$8,000	-\$35,000	83.3%	83.3%
611 Garden Grant	-\$51		-\$755	\$0	-\$755	83.3%	
611 Event Supplies		-\$1,506	\$0	-\$4,000	-\$4,000	83.3%	37.7%
612 Office Supplies	-\$45,034	-\$26,192	-\$45,000	\$5,000	-\$40,000	83.3%	65.5%
613 OPA Apparel / Concessions	-\$7,581	-\$19,509	-\$10,000	-\$10,000	-\$20,000	83.3%	97.5%
614 Safety & Wellness	-\$4,106		\$0	\$0	\$0	83.3%	
614 Staff Meals / Appreciation / Prof Dev	-\$16,970	-\$22,488	-\$30,000	-\$10,000	-\$40,000	83.3%	56.2%
615 Counseling / Cultural Supplies			\$0	\$0	\$0	83.3%	
616 Aguilas & 7 Habits	-\$398	-\$924	-\$3,000	\$0	-\$3,000	83.3%	30.8%
617 OPAP0	-\$18		\$0	\$0	\$0	83.3%	
618 Art Expo		-\$139	-\$2,700	\$0	-\$2,700	83.3%	5.1%
619 Yearbooks	-\$4,455		-\$6,790	\$0	-\$6,790	83.3%	
621 Natural Gas	-\$18,195	-\$23,807	-\$20,000	-\$5,155	-\$25,155	83.3%	94.6%
622 Electricity	-\$57,079	-\$51,443	-\$80,000	\$5,000	-\$75,000	83.3%	68.6%
630 Lunch Program Food & Supplies	-\$321,514	-\$363,492	-\$440,000	\$0	-\$440,000	83.3%	82.6%
641 Curriculum & Educational Software	-\$71,360	-\$68,691	-\$88,000	-\$47,000	-\$135,000	83.3%	50.9%
644 Library	-\$16,799	-\$19,050	-\$20,000	\$0	-\$20,000	83.3%	95.2%

Budget Name	PY Amount	YTD Amount	Budget	Variance	Forecast	% Target	% of Forecast
650 Technology Related Supplies	-\$33,059	-\$109	\$0	-\$109	-\$109	83.3%	99.6%
680 Maintenance & Cleaning Supplies	-\$23,489	-\$15,718	-\$30,000	\$0	-\$30,000	83.3%	52.4%
TOT	-\$663,679	-\$649,405	-\$826,245	-\$58,564	-\$884,809		
Ogden Preparatory - Expense - 700 Property - 72.8% (4 School budgets)							
710 Land and Site Improvement		-\$35,151	\$0	-\$90,000	-\$90,000	83.3%	39.1%
733 Furniture and Fixtures	-\$16,017	-\$33,870	-\$20,000	-\$20,000	-\$40,000	83.3%	84.7%
734 Technology-Related Hardware & Software	-\$184,463	-\$269,033	-\$170,000	-\$170,000	-\$340,000	83.3%	79.1%
738 Kitchen Equipment	-\$48,014	-\$23,026	-\$5,000	-\$21,000	-\$26,000	83.3%	88.6%
TOT	-\$248,494	-\$361,081	-\$195,000	-\$301,000	-\$496,000		
Ogden Preparatory - Expense - 800 Debt Service and Misc - 77.4% (5 School budgets)							
810 Dues and Fees	-\$40,553	-\$26,463	-\$25,000	-\$5,000	-\$30,000	83.3%	88.2%
812 Banking Fees	-\$2,046	-\$1,835	-\$3,000	\$0	-\$3,000	83.3%	61.2%
850 Bond - Restricted Assets	-\$942,135	-\$786,699	-\$978,842	\$0	-\$978,842	83.3%	80.4%
850 Contingency			-\$20,000	-\$20,000	-\$40,000	83.3%	
890 Miscellaneous	-\$11,338	-\$64	-\$1,000	\$0	-\$1,000	83.3%	6.4%
TOT	-\$996,073	-\$815,061	-\$1,027,842	-\$25,000	-\$1,052,842		
TOT	\$1,148,386	-\$17,172	\$315,541	\$181,976	\$497,517		

Coversheet

FY22 Final Budget Approval

Section: II. Finance
Item: B. FY22 Final Budget Approval
Purpose: Vote
Submitted by:
Related Material: Budget Detail_April 2022-Proposed Final Budget.pdf

Finance Manager : School Budget | Current Yr Budget

Current Yr Budget

Budget Name	PY Amount	YTD Amount	Budget	Variance	Forecast	% Target	% of Forecast
Ogden Preparatory - Revenue - 1000 Local Revenue - 85.3% (12 School budgets)							
1510 Interest on Investments	\$21,633	\$13,352	\$25,000	-\$9,000	\$16,000	83.3%	83.4%
1600 Lunch Program (Students & Adults)	\$5,664	\$4,280	\$0	\$4,280	\$4,280	83.3%	100.0%
1710 Student Sales	\$11,645	\$8,828	\$15,000	-\$6,172	\$8,828	83.3%	100.0%
1710 OPAPO	\$16,023		\$0	\$0	\$0	83.3%	
1710 Art Expo			\$1,500	\$920	\$2,420	83.3%	
1740 Student Fees	\$21,369	\$24,229	\$14,816	\$9,413	\$24,229	83.3%	100.0%
1741 Trips		\$11,992	\$40,000	-\$20,000	\$20,000	83.3%	60.0%
1790 Sports	-\$35		\$3,000	-\$3,000	\$0	83.3%	
1910 Rental of Facility	\$360	\$975	\$0	\$975	\$975	83.3%	100.0%
1920 Contributions & Donations	\$5,270	\$7,950	\$2,000	\$5,950	\$7,950	83.3%	100.0%
1920 Fundraising			\$25,000	-\$25,000	\$0	83.3%	
1990 Miscellaneous	\$2,222	\$4,368	\$0	\$4,368	\$4,368	83.3%	100.0%
TOT	\$84,150	\$75,976	\$126,316	-\$37,266	\$89,050		
Ogden Preparatory - Revenue - 3000 State Revenue - 83.0% (33 School budgets)							
0.3005 Regular School Prgm K	\$184,825	\$168,330	\$195,464	\$6,210	\$201,674	83.3%	83.5%
0.301 Regular School Prgm 1-12	\$3,197,699	\$2,766,710	\$3,381,771	-\$72,244	\$3,309,527	83.3%	83.6%
0.302 Professional Staff	\$257,503	\$223,491	\$273,195	-\$5,840	\$267,355	83.3%	83.6%
0.32 Charter School Base Amount	\$15,000	\$85,421	\$100,399	\$2,106	\$102,505	83.3%	83.3%
31.1205 Special Education -- Add-On	\$559,466	\$493,838	\$592,605	\$0	\$592,605	83.3%	83.3%
31.121 Special Education -- Self-Contained	\$50,304	\$42,551	\$51,062	\$0	\$51,062	83.3%	83.3%
31.122 Special Education -- Extended Year	\$4,234	\$3,739	\$4,466	\$0	\$4,466	83.3%	83.7%
31.1225 Special Education - Impact Aid	\$10,242	\$9,415	\$11,230	\$0	\$11,230	83.3%	83.8%
31.1278 Special Education- Extended Year Stipend	\$5,290	\$35,587	\$0	\$35,587	\$35,587	83.3%	100.0%
31.5201 Class Size Reduction K-8	\$302,060	\$264,163	\$323,748	-\$7,902	\$315,846	83.3%	83.6%
31.5344 Enhancement for At-risk students	\$94,001	\$141,092	\$169,310	\$0	\$169,310	83.3%	83.3%
31.5695 Early Intervention General	\$30,000		\$90,000	-\$90,000	\$0	83.3%	
32.5658 COVID 19 Stipend	\$172,008		\$0	\$0	\$0	83.3%	
32.5665 Grow Your Own Teacher & Counselor		\$47,040	\$0	\$11,000	\$11,000	83.3%	427.6%
33.5331 Gifted and Talented	\$7,599	\$7,051	\$7,169	\$1,292	\$8,461	83.3%	83.3%
33.5641 Early Intervention	\$90,000	\$102,210	\$30,000	\$92,652	\$122,652	83.3%	83.3%
33.5805 Early Literacy (K-3)	\$57,567	\$62,567	\$62,245	\$12,836	\$75,081	83.3%	83.3%
34.5662 Outdoor Recreation Grant			\$0	\$10,000	\$10,000	83.3%	
34.5807 TSSP (Teacher Salary Supplement Prgm)	\$8,354	\$8,034	\$0	\$8,034	\$8,034	83.3%	100.0%
34.5868 Teacher Supplies & Materials	\$9,567	\$9,958	\$9,382	\$576	\$9,958	83.3%	100.0%
34.5876 Charter School Local Replacement	\$2,661,918	\$2,341,510	\$2,809,040	-\$8,103	\$2,800,937	83.3%	83.6%

Budget Name	PY Amount	YTD Amount	Budget	Variance	Forecast	% Target	% of Forecast
34.5876 Educator Salary Adjustment	\$313,169	\$274,734	\$313,169	\$16,512	\$329,681	83.3%	83.3%
34.5911 ELL Software	\$13,500		\$0	\$41,833	\$41,833	83.3%	
35.542 School Land Trust	\$133,964	\$138,078	\$136,897	\$1,181	\$138,078	83.3%	100.0%
35.5655 Digital Teaching & Learning	\$61,465		\$64,851	\$0	\$64,851	83.3%	
35.5666 Professional Learning		\$6,137	\$0	\$7,365	\$7,365	83.3%	83.3%
35.5678 TSSA	\$160,585	\$156,166	\$188,095	-\$1,417	\$186,678	83.3%	83.7%
35.5679 Student Health & Counseling	\$16,774	\$10,750	\$57,137	\$0	\$57,137	83.3%	18.8%
35.581 Library Books & Electronic Res	\$1,095	\$899	\$1,073	\$3	\$1,076	83.3%	83.5%
38.5644 STEM Endorsement Center	\$11,146		\$0	\$0	\$0	83.3%	
38.5672 Substance Abuse		\$2,333	\$0	\$0	\$0	83.3%	
38.5674 Suicide Prevention	\$1,066	\$1,000	\$0	\$1,000	\$1,000	83.3%	100.0%
38.807 Liquor Tax (Lunch Program)	\$84,746	\$91,687	\$75,000	\$16,687	\$91,687	83.3%	100.0%
TOT	\$8,515,146	\$7,494,491	\$8,947,308	\$79,368	\$9,026,676		
Ogden Preparatory - Revenue - 4000 Federal Revenue - 42.6% (25 School budgets)							
42.721 ESSER CARES	\$124,503	\$1,600	\$0	\$1,600	\$1,600	83.3%	100.0%
42.7215 ESSER II			\$330,000	\$318,979	\$648,979	83.3%	
42.722 GEER Funding	\$34,564		\$0	\$0	\$0	83.3%	
42.7225 ESSER III ARPA			\$0	\$250,000	\$250,000	83.3%	
42.723 GEERS II			\$0	\$20,204	\$20,204	83.3%	
45.728 PPE	\$8,255		\$0	\$0	\$0	83.3%	
45.728 Corona Relief Funds	\$25,959		\$0	\$0	\$0	83.3%	
45.8079 After School Program		\$4,643		\$4,643	\$4,643	83.3%	100.0%
45.8081 Emergency Operating Funds		\$3,972	\$0	\$3,972	\$3,972	83.3%	100.0%
47.729 CARES Wifi	\$87,103		\$0	\$0	\$0	83.3%	
47.729 Weber CARES	\$62,000		\$0	\$0	\$0	83.3%	
48.7801 Title I - Remedial Services	\$238,405	\$125,986	\$221,696	\$0	\$221,696	83.3%	56.8%
48.786 Title II	\$49,987	\$37,285	\$36,535	\$750	\$37,285	83.3%	100.0%
48.786 Title II School Leader (MAPP)		\$14,848	\$0	\$14,848	\$14,848	83.3%	100.0%
48.788 Title III A - English Lang Acq	\$21,809	\$20,033	\$18,962	\$1,071	\$20,033	83.3%	100.0%
48.7905 Supporting Effective Instruction	\$9,063		\$0	\$0	\$0	83.3%	
4522 IDEA Preschool	\$2,995		\$2,706	\$781	\$3,487	83.3%	
4522 IDEA Preschool ARP				\$3,322	\$3,322	83.3%	
4524 IDEA	\$159,570	\$89,380	\$151,827	\$6,791	\$158,618	83.3%	56.3%
4524 IDEA ARP				\$43,226	\$43,226	83.3%	
4526 MTSS Grant	\$6,000	\$6,000	\$6,000	\$0	\$6,000	83.3%	100.0%
4560 Kitchen Equipment Grant	\$43,418		\$0	\$26,560	\$26,560	83.3%	
4560 National School Lunch Program	\$37,480	\$40,477	\$49,700	\$0	\$49,700	83.3%	81.4%
4560 NSLP - Free & Reduced	\$280,304	\$441,631	\$300,000	\$141,631	\$441,631	83.3%	100.0%
4560 NSLP - Breakfast	\$82,980	\$83,760	\$75,000	\$8,760	\$83,760	83.3%	100.0%
TOT	\$1,274,394	\$869,614	\$1,192,426	\$847,138	\$2,039,564		

Budget Name	PY Amount	YTD Amount	Budget	Variance	Forecast	% Target	% of Forecast
Ogden Preparatory - Expense - 100 Salaries - 81.9% (19 School budgets)							
121 Principals and Assistants	-\$460,370	-\$497,688	-\$516,355	-\$108,033	-\$624,388	83.3%	79.7%
131 Teachers	-\$2,754,137	-\$2,582,351	-\$3,088,985	\$20,241	-\$3,068,744	83.3%	84.2%
132 PTO Cash out	\$2,762	-\$13,523	-\$15,000	-\$2,000	-\$17,000	83.3%	79.5%
132 Substitute Teachers	-\$39,751	-\$49,766	-\$45,000	-\$12,524	-\$57,524	83.3%	86.5%
133 Special Education Director & Teachers	-\$294,938	-\$303,695	-\$389,590	-\$1,524	-\$391,114	83.3%	77.6%
134 Stipends (Sports, other)	-\$119,672	-\$85,773	-\$65,000	-\$56,542	-\$121,542	83.3%	70.6%
134 End of Year Bonus / Returning Bonus	-\$202,409	-\$26,520	-\$45,000	\$3,000	-\$42,000	83.3%	63.1%
134 Christmas Bonus	-\$53,979	-\$56,662	-\$53,979	-\$2,683	-\$56,662	83.3%	100.0%
142 Counselor	-\$101,917	-\$94,667	-\$114,000	\$0	-\$114,000	83.3%	83.0%
145 Librarian	-\$118,245	-\$112,141	-\$135,505	\$0	-\$135,505	83.3%	82.8%
152 Secretarial & Clerical	-\$175,099	-\$171,974	-\$230,500	\$4,666	-\$225,834	83.3%	76.2%
161 General Ed TA	-\$47,736	-\$129,797	-\$28,214	-\$130,543	-\$158,757	83.3%	81.8%
161.1 ESSER II Aides			-\$61,950	\$61,950		83.3%	
162 Special Education TA	-\$356,780	-\$331,378	-\$403,956	-\$4,937	-\$408,893	83.3%	81.0%
163 Title I TA	-\$120,043	-\$102,986	-\$152,611	-\$7,261	-\$159,872	83.3%	64.4%
164 Early Literacy (K-3) TA	-\$64,403	-\$57,450	-\$71,552	\$1,133	-\$70,419	83.3%	81.6%
165 Land Trust TA	-\$66,118	-\$86,270	-\$51,109	-\$52,121	-\$103,230	83.3%	83.6%
166 Early Intervention TA	-\$6,695	-\$6,071	-\$15,488	\$6,461	-\$9,027	83.3%	67.3%
191 Food Service	-\$229,331	-\$247,943	-\$285,688	-\$1,713	-\$287,401	83.3%	86.3%
TOT	-\$5,208,861	-\$4,956,653	-\$5,769,482	-\$282,430	-\$6,051,912		
Ogden Preparatory - Expense - 200 Employee Benefits - 81.1% (7 School budgets)							
210 Retirement	-\$130,360	-\$115,651	-\$160,000	\$0	-\$160,000	83.3%	72.3%
220 Social Security	-\$343,926	-\$356,570	-\$441,365	\$0	-\$441,365	83.3%	80.8%
241 Group Insurance	-\$350,819	-\$348,470	-\$419,566	\$0	-\$419,566	83.3%	83.1%
241 Health Stipend	-\$23,178		\$0	\$0	\$0	83.3%	
242 Waiver Benefit	-\$109,600	-\$113,729	-\$112,500	-\$18,000	-\$130,500	83.3%	87.1%
270 Worker's Compensation Fund	-\$30,748	-\$20,183	-\$38,714	\$13,714	-\$25,000	83.3%	80.7%
280 Unemployment Insurance	-\$7,224	-\$7,903	-\$15,000	\$4,000	-\$11,000	83.3%	71.8%
TOT	-\$995,855	-\$962,506	-\$1,187,145	-\$286	-\$1,187,431		
Ogden Preparatory - Expense - 300 Professional and Technical Services - 74.9% (9 School budgets)							
320 Mental Health (Weber Health Services)	-\$16,774	-\$19,609	-\$57,137	\$0	-\$57,137	83.3%	34.3%
321 Crossing Guard Services (Ogden Police Dept)			\$0	\$0	\$0	83.3%	
323 Speech Therapy	-\$124,957	-\$106,670	-\$124,680	-\$3,324	-\$128,004	83.3%	83.3%
323 Psychology / Behavior	-\$10,292	-\$5,467	-\$12,000	\$6,300	-\$5,700	83.3%	95.9%
330 Employee Training & Development	-\$21,207	-\$53,424	-\$45,000	-\$30,000	-\$75,000	83.3%	71.2%
340 Legal	-\$490	-\$88	-\$15,000	\$12,000	-\$3,000	83.3%	2.9%
350 Business Manager Services	-\$77,000	-\$70,000	-\$84,000	\$0	-\$84,000	83.3%	83.3%
352 Audit Services	-\$20,100	-\$21,800	-\$22,300	\$0	-\$22,300	83.3%	97.8%

Budget Name	PY Amount	YTD Amount	Budget	Variance	Forecast	% Target	% of Forecast
355 IT Services (ETS Monthly)	-\$37,662	-\$52,165	-\$50,000	-\$14,500	-\$64,500	83.3%	80.9%
TOT	-\$308,483	-\$329,222	-\$410,117	-\$29,524	-\$439,641		
Ogden Preparatory - Expense - 400 Property Services - 76.5% (5 School budgets)							
410 Garbage / Sewer / Water	-\$48,276	-\$33,010	-\$60,000	\$15,000	-\$45,000	83.3%	73.4%
430 Repairs / Maintenance / Monitoring	-\$100,621	-\$157,303	-\$135,000	-\$73,000	-\$208,000	83.3%	75.6%
433 Cleaning & Custodial Services	-\$65,307	-\$59,370	-\$72,000	\$0	-\$72,000	83.3%	82.5%
435 Lawn Care & Snow Removal	-\$21,310	-\$21,794	-\$30,000	\$0	-\$30,000	83.3%	72.6%
443 Lease of Copy Machines	-\$9,909	-\$3,807	-\$4,800	\$0	-\$4,800	83.3%	79.3%
TOT	-\$245,423	-\$275,284	-\$301,800	-\$58,000	-\$359,800		
Ogden Preparatory - Expense - 500 Other Services - 58.3% (10 School budgets)							
520 Property & Liability Insurances	-\$33,637	-\$37,526	-\$37,000	-\$6,460	-\$43,460	83.3%	86.3%
530 Communication (Phone & Internet)	-\$5,389	-\$5,139	-\$6,178	\$0	-\$6,178	83.3%	83.2%
540 Marketing	-\$8,830	-\$5,084	-\$10,000	\$3,000	-\$7,000	83.3%	72.6%
542 Board Expenses	-\$6,837	-\$312	-\$8,000	\$0	-\$8,000	83.3%	3.9%
580 Travel / Per Diem		-\$12,478	-\$25,000	-\$10,000	-\$35,000	83.3%	35.7%
590 Field Trips (Bussing & Entrance Fees)	-\$614	-\$12,799	-\$40,000	\$6,000	-\$34,000	83.3%	37.6%
590 Student Activities - Aguilas Bussing			-\$1,200	\$0	-\$1,200	83.3%	
591 Sports (Bussing, Fees, Tri, Weight Training)	-\$1,633	-\$15,898	-\$20,000	\$3,000	-\$17,000	83.3%	93.5%
592 Trips		-\$16,507	-\$81,000	\$51,000	-\$30,000	83.3%	55.0%
593 Clubs	-\$1,494	-\$2,298	-\$4,500	\$1,000	-\$3,500	83.3%	65.7%
TOT	-\$58,435	-\$108,040	-\$232,878	\$47,540	-\$185,338		
Ogden Preparatory - Expense - 600 Supplies and Materials - 73.4% (20 School budgets)							
611 SpEd Supplies	-\$10,557	-\$7,164	-\$7,000	-\$300	-\$7,300	83.3%	98.1%
611 Classroom/ Legislative Supplies	-\$33,014	-\$29,172	-\$43,000	\$8,000	-\$35,000	83.3%	83.3%
611 Garden Grant	-\$51		-\$755	\$0	-\$755	83.3%	
611 Event Supplies		-\$1,506	\$0	-\$4,000	-\$4,000	83.3%	37.7%
612 Office Supplies	-\$45,034	-\$26,192	-\$45,000	\$5,000	-\$40,000	83.3%	65.5%
613 OPA Apparel / Concessions	-\$7,581	-\$19,509	-\$10,000	-\$10,000	-\$20,000	83.3%	97.5%
614 Safety & Wellness	-\$4,106		\$0	\$0	\$0	83.3%	
614 Staff Meals / Appreciation / Prof Dev	-\$16,970	-\$22,488	-\$30,000	-\$10,000	-\$40,000	83.3%	56.2%
615 Counseling / Cultural Supplies			\$0	\$0	\$0	83.3%	
616 Aguilas & 7 Habits	-\$398	-\$924	-\$3,000	\$0	-\$3,000	83.3%	30.8%
617 OPAPO	-\$18		\$0	\$0	\$0	83.3%	
618 Art Expo		-\$139	-\$2,700	\$0	-\$2,700	83.3%	5.1%
619 Yearbooks	-\$4,455		-\$6,790	\$0	-\$6,790	83.3%	
621 Natural Gas	-\$18,195	-\$23,807	-\$20,000	-\$5,155	-\$25,155	83.3%	94.6%
622 Electricity	-\$57,079	-\$51,443	-\$80,000	\$5,000	-\$75,000	83.3%	68.6%
630 Lunch Program Food & Supplies	-\$321,514	-\$363,492	-\$440,000	\$0	-\$440,000	83.3%	82.6%
641 Curriculum & Educational Software	-\$71,360	-\$68,691	-\$88,000	-\$47,000	-\$135,000	83.3%	50.9%
644 Library	-\$16,799	-\$19,050	-\$20,000	\$0	-\$20,000	83.3%	95.2%

Budget Name	PY Amount	YTD Amount	Budget	Variance	Forecast	% Target	% of Forecast
650 Technology Related Supplies	-\$33,059	-\$109	\$0	-\$109	-\$109	83.3%	99.6%
680 Maintenance & Cleaning Supplies	-\$23,489	-\$15,718	-\$30,000	\$0	-\$30,000	83.3%	52.4%
TOT	-\$663,679	-\$649,405	-\$826,245	-\$58,564	-\$884,809		
Ogden Preparatory - Expense - 700 Property - 72.8% (4 School budgets)							
710 Land and Site Improvement		-\$35,151	\$0	-\$90,000	-\$90,000	83.3%	39.1%
733 Furniture and Fixtures	-\$16,017	-\$33,870	-\$20,000	-\$20,000	-\$40,000	83.3%	84.7%
734 Technology-Related Hardware & Software	-\$184,463	-\$269,033	-\$170,000	-\$170,000	-\$340,000	83.3%	79.1%
738 Kitchen Equipment	-\$48,014	-\$23,026	-\$5,000	-\$21,000	-\$26,000	83.3%	88.6%
TOT	-\$248,494	-\$361,081	-\$195,000	-\$301,000	-\$496,000		
Ogden Preparatory - Expense - 800 Debt Service and Misc - 77.4% (5 School budgets)							
810 Dues and Fees	-\$40,553	-\$26,463	-\$25,000	-\$5,000	-\$30,000	83.3%	88.2%
812 Banking Fees	-\$2,046	-\$1,835	-\$3,000	\$0	-\$3,000	83.3%	61.2%
850 Bond - Restricted Assets	-\$942,135	-\$786,699	-\$978,842	\$0	-\$978,842	83.3%	80.4%
850 Contingency			-\$20,000	-\$20,000	-\$40,000	83.3%	
890 Miscellaneous	-\$11,338	-\$64	-\$1,000	\$0	-\$1,000	83.3%	6.4%
TOT	-\$996,073	-\$815,061	-\$1,027,842	-\$25,000	-\$1,052,842		
TOT	\$1,148,386	-\$17,172	\$315,541	\$181,976	\$497,517		

Coversheet

FY23 Initial Budget Approval

Section: II. Finance
Item: C. FY23 Initial Budget Approval
Purpose: Vote
Submitted by:
Related Material: OPA_FY23 Proposed Budget.pdf



Actuals as of: **February 28, 2022** Percentage of Year: **66.7%**

Budget Detail Report

	(1,040 Students) FY21 Actuals	(1,037 Students) FY22 Actuals	1037 FY22 Forecast	(-7 Students) Changes	1030 FY23 Forecast	% of Forecast
Revenue						
1000 Local						
1510 Interest on Investments	\$ 15,802	\$ 10,702	\$ 16,000	\$ -	\$ 16,000	66.9%
1600 Lunch Program (Students & Adults)	\$ 6,277	\$ 3,941	\$ 3,941	\$ 36,059	\$ 40,000	100.0%
1710 Student Sales	\$ 8,567	\$ 8,672	\$ 10,000	\$ -	\$ 10,000	86.7%
1710 OPAPO	\$ 16,023		\$ -	\$ -	\$ -	#DIV/0!
1710 Art Expo	\$ -		\$ 1,500	\$ 500	\$ 2,000	0.0%
1740 Student Fees	\$ 16,542	\$ 15,533	\$ 15,533	\$ -	\$ 15,533	100.0%
1741 Trips	\$ -	\$ 11,992	\$ 30,000	\$ 35,000	\$ 65,000	40.0%
1790 Sports	\$ -		\$ -	\$ -	\$ -	#DIV/0!
1910 Rental of Facility	\$ -	\$ 825	\$ 825	\$ -	\$ 825	100.0%
1920 Fundraising	\$ -		\$ -	\$ -	\$ -	#DIV/0!
1920 Contributions & Donations	\$ 5,099	\$ 13,842	\$ 13,842	\$ (3,842)	\$ 10,000	100.0%
1990 Miscellaneous	\$ 216	\$ -	\$ -	\$ -	\$ -	#DIV/0!
Total 1000:	\$ 68,526	\$ 65,507	\$ 91,641	\$ 67,717	\$ 159,358	71.5%
3000 State						
0.3005 Regular School Prgm K	\$ 184,825	\$ 134,986	\$ 201,674	\$ 16,448	\$ 218,122	66.9%
0.3010 Regular School Prgm 1-12	\$ 3,197,699	\$ 2,224,127	\$ 3,309,527	\$ 269,913	\$ 3,579,440	67.2%
0.3020 Professional Staff	\$ 257,503	\$ 179,627	\$ 267,355	\$ (1,805)	\$ 265,550	67.2%
0.3200 Charter School Admin Costs Base Amount	\$ 15,000	\$ 68,337	\$ 102,505	\$ (692)	\$ 101,813	66.7%
31.1205 Special Education -- Add-On	\$ 559,466	\$ 395,070	\$ 592,605	\$ -	\$ 592,605	66.7%
31.1210 Special Education -- Self-Contained	\$ 50,304	\$ 34,041	\$ 51,062	\$ -	\$ 51,062	66.7%
31.1220 Special Education -- Extended Year	\$ 4,234	\$ 2,991	\$ 4,466	\$ -	\$ 4,466	67.0%
31.1225 Special Education - Impact Aid	\$ 10,242	\$ 7,532	\$ 11,230	\$ -	\$ 11,230	67.1%
31.1278 Special Education- Extended Year Stipend	\$ 5,290	\$ 2,645	\$ 2,645	\$ (2,645)	\$ -	100.0%
31.5201 Class Size Reduction K-8	\$ 302,060	\$ 212,480	\$ 315,846	\$ (2,132)	\$ 313,714	67.3%
31.5344 Enhancement for At-risk students	\$ 94,001	\$ 112,873	\$ 169,310	\$ 30,690	\$ 200,000	66.7%
32.5665 Grow Your Own Teacher		\$ 47,040	\$ 15,570	\$ (15,570)	\$ -	302.1%
33.5331 Gifted and Talented	\$ 7,599	\$ 4,936	\$ 7,169	\$ (48)	\$ 7,121	68.9%
33.5641 Early Intervention	\$ 90,000	\$ 81,768	\$ 122,652	\$ (2,652)	\$ 120,000	66.7%
33.5805 Early Literacy (K-3)	\$ 57,567	\$ 43,797	\$ 75,081	\$ (507)	\$ 74,574	58.3%
34.5662 Outdoor Recreation Grant	\$ -	\$ -	\$ 10,000	\$ (10,000)	\$ -	0.0%
34.5807 TSSP (Teacher Salary Supplement Prgm)	\$ 8,354	\$ -	\$ -	\$ -	\$ -	#DIV/0!
34.5868 Teacher Materials and Supplies	\$ 9,567	\$ 9,958	\$ 9,958	\$ (67)	\$ 9,891	100.0%
34.5876 Charter School Local Replacement	\$ 2,661,918	\$ 1,882,083	\$ 2,800,937	\$ 185,033	\$ 2,985,970	67.2%
Charter School Local Replacement Lag			\$ -	\$ 51,951	\$ 51,951	0.0%
34.5876 Educator Salary Adjustment	\$ 313,169	\$ 219,787	\$ 329,681	\$ -	\$ 329,681	66.7%
34.5911 EL Software Grant	\$ 13,500	\$ -	\$ 21,920	\$ 17,753	\$ 39,673	0.0%
35.5420 School Land Trust	\$ 133,964	\$ 138,078	\$ 138,078	\$ 6,922	\$ 145,000	100.0%
35.5655 Digital Teaching & Learning	\$ 61,465	\$ -	\$ 64,851	\$ -	\$ 64,851	0.0%
35.5666 Professional Learning	\$ -	\$ 4,296	\$ 7,365	\$ (7,365)	\$ -	58.3%
35.5678 TSSA	\$ 160,585	\$ 110,399	\$ 186,678	\$ (1,260)	\$ 185,418	59.1%
35.5679 Student Health & Counseling	\$ 16,774	\$ 10,750	\$ 57,137	\$ (17,137)	\$ 40,000	18.8%
35.5810 Library Books & Electronic Res	\$ 1,095	\$ 722	\$ 1,076	\$ (7)	\$ 1,069	67.1%
35.5644 STEM Endorsement Center	\$ 11,146	\$ -	\$ -	\$ -	\$ -	#DIV/0!
38.5672 Substance Abuse	\$ -	\$ 2,333	\$ 2,333	\$ (16)	\$ 2,317	100.0%
38.5674 Suicide Prevention	\$ 1,066	\$ 1,000	\$ 1,000	\$ -	\$ 1,000	100.0%
38.8070 Liquor Tax (Lunch Program)	\$ 84,746	\$ 66,710	\$ 75,000	\$ -	\$ 75,000	88.9%
Total 3000:	\$ 8,313,139	\$ 5,998,366	\$ 8,954,711	\$ 516,807	\$ 9,471,518	67.0%

ACADEMY

Budget Detail Report	(1,040 Students)	(1,037 Students)	1037	(-7 Students)	1030	% of
	FY21 Actuals	FY22 Actuals	FY22 Forecast	Changes	FY23 Forecast	Forecast
4000 Federal						
42.7210 ESSER CARES	\$ 124,503	\$ 1,600	\$ 1,600	\$ (1,600)	\$ -	100.0%
42.7215 ESSER II CARES	\$ -	\$ -	\$ 648,979	\$ (648,979)	\$ -	0.0%
42.7220 GEER Funding	\$ 34,564	\$ -	\$ -	\$ -	\$ -	#DIV/0!
42.7225 ESSER III ARP	\$ -	\$ -	\$ 225,000	\$ 775,000	\$ 1,000,000	0.0%
42.7230 GEERS II Funding	\$ -	\$ -	\$ 20,204	\$ -	\$ 20,204	0.0%
45.7280 PPE	\$ 8,255	\$ -	\$ -	\$ -	\$ -	#DIV/0!
45.7280 Corona Relief Fund	\$ 25,959	\$ -	\$ -	\$ -	\$ -	#DIV/0!
45.8079 After School Program	\$ -	\$ 2,842	\$ 2,842	\$ (2,842)	\$ -	100.0%
45.8081 Emergency Operating Fund	\$ -	\$ 3,972	\$ 3,972	\$ (3,972)	\$ -	100.0%
47.7290 CARES Wifi	\$ 87,103	\$ -	\$ -	\$ -	\$ -	#DIV/0!
47.7290 Weber CARES	\$ 62,000	\$ -	\$ -	\$ -	\$ -	#DIV/0!
48.7801 Title I - Remedial Services	\$ 238,405	\$ -	\$ 221,696	\$ 3,551	\$ 225,247	0.0%
48.7860 Title II	\$ 49,987	\$ 749	\$ 36,535	\$ -	\$ 36,535	2.1%
48.7860 Title II - MAPP	\$ -	\$ 14,848	\$ 14,848	\$ (14,848)	\$ -	100.0%
48.7880 Title III A - English Lang Acq	\$ 21,809	\$ -	\$ 19,300	\$ -	\$ 19,300	0.0%
48.7905 Supporting Effective Instruction	\$ 9,063	\$ -	\$ -	\$ -	\$ -	#DIV/0!
4524 IDEA Preschool	\$ 2,995	\$ -	\$ 3,487	\$ -	\$ 3,487	0.0%
4524 IDEA Preschool ARP	\$ -	\$ -	\$ 3,322	\$ (3,322)	\$ -	0.0%
4524 IDEA	\$ 159,570	\$ -	\$ 158,618	\$ -	\$ 158,618	0.0%
4524 IDEA ARP	\$ -	\$ -	\$ 43,226	\$ (43,226)	\$ -	0.0%
4526 MTSS Grant	\$ 6,000	\$ 6,000	\$ 6,000	\$ -	\$ 6,000	100.0%
4560 Kitchen Equipment Grant	\$ 43,418	\$ -	\$ 26,560	\$ 49,918	\$ 76,478	0.0%
4560 National School Lunch Program	\$ 37,480	\$ 29,247	\$ 49,700	\$ 1,300	\$ 51,000	58.8%
4560 NSLP - Free & Reduced	\$ 280,304	\$ 314,380	\$ 314,380	\$ (14,380)	\$ 300,000	100.0%
4560 NSLP - Breakfast	\$ 82,980	\$ 64,593	\$ 75,000	\$ -	\$ 75,000	86.1%
Total 4000:	\$ 1,274,395	\$ 438,231	\$ 1,875,269	\$ 96,600	\$ 1,971,869	23.4%
Total Revenue:	\$ 9,656,060	\$ 6,502,104	\$ 10,921,621	\$ 681,124	\$ 11,602,745	59.5%

Ur

ACADEMY

Budget Detail Report	(1,040 Students)	(1,037 Students)	1037	(-7 Students)	1030	% of
	FY21 Actuals	FY22 Actuals	FY22 Forecast	Changes	FY23 Forecast	Forecast

Expenses

100 Salaries						
121 Principals and Assistants	\$ 460,370	\$ 395,452	\$ 624,388	\$ 125,012	\$ 749,400	63.3%
131 Teachers	\$ 2,754,137	\$ 2,066,700	\$ 3,068,744	\$ 381,256	\$ 3,450,000	67.3%
132 PTO Cash out	\$ 2,762	\$ 16,445	\$ 17,000	\$ -	\$ 17,000	96.7%
132 Substitute Teachers	\$ 39,751	\$ 37,235	\$ 57,524	\$ 20,476	\$ 78,000	64.7%
133 Special Education Director & Teachers	\$ 294,938	\$ 247,092	\$ 391,114	\$ 70,019	\$ 461,133	63.2%
134 Stipends (Sports, other)	\$ 119,672	\$ 78,344	\$ 88,600	\$ (23,600)	\$ 65,000	88.4%
134 End of Year Bonus / Returning Bonus	\$ 202,409	\$ 26,520	\$ 45,000	\$ -	\$ 45,000	58.9%
134 Christmas Bonus	\$ 53,979	\$ 56,662	\$ 56,662	\$ (1,662)	\$ 55,000	100.0%
142 Counselor	\$ 101,917	\$ 75,667	\$ 114,000	\$ 11,000	\$ 125,000	66.4%
145 Librarian	\$ 118,245	\$ 89,557	\$ 135,505	\$ 18,559	\$ 154,064	66.1%
152 Secretarial & Clerical	\$ 175,099	\$ 139,557	\$ 225,834	\$ 45,720	\$ 271,554	61.8%
161 General Ed TA	\$ 47,736	\$ 98,298	\$ 198,558	\$ 597,534	\$ 796,092	49.5%
162 Education Technology TA	\$ 356,780	\$ 267,133	\$ 408,893	\$ (408,893)	\$ -	65.3%
163 Title I TA	\$ 120,043	\$ 82,590	\$ 159,872	\$ (159,872)	\$ -	51.7%
164 Early Literacy (K-3) TA	\$ 64,403	\$ 46,205	\$ 70,419	\$ (70,419)	\$ -	65.6%
165 Land Trust TA	\$ 66,118	\$ 67,092	\$ 54,116	\$ (54,116)	\$ -	124.0%
166 Early Intervention TA	\$ 6,695	\$ 6,071	\$ 9,027	\$ (9,027)	\$ -	67.3%
191 Food Service	\$ 229,331	\$ 197,508	\$ 287,401	\$ 16,560	\$ 303,961	68.7%
Raises	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!
Total 100:	\$ 5,214,385	\$ 3,994,128	\$ 6,012,657	\$ 558,547	\$ 6,571,204	66.4%
200 Benefits						
210 Retirement	\$ 130,360	\$ 91,550	\$ 160,000	\$ -	\$ 160,000	57.2%
220 Social Security	\$ 343,926	\$ 284,903	\$ 441,365	\$ 18,619	\$ 459,984	64.6%
241 Group Insurance	\$ 350,819	\$ 283,238	\$ 419,566	\$ -	\$ 419,566	67.5%
241 Health Stipend	\$ 23,178	\$ -	\$ -	\$ -	\$ -	#DIV/0!
242 Waiver Benefit	\$ 109,600	\$ 90,604	\$ 130,500	\$ -	\$ 130,500	69.4%
270 Worker's Compensation Fund	\$ 30,748	\$ 18,123	\$ 38,714	\$ (26,390)	\$ 12,324	46.8%
280 Unemployment Insurance	\$ 7,224	\$ 3,705	\$ 15,000	\$ -	\$ 15,000	24.7%
Total 200:	\$ 995,855	\$ 772,123	\$ 1,205,145	\$ (7,771)	\$ 1,197,374	64.1%
300 Prof & Technical Services						
320 Mental Health (Weber Health Services)	\$ 16,774	\$ 11,464	\$ 57,137	\$ (17,137)	\$ 40,000	20.1%
323 Speech Therapy	\$ 124,957	\$ 74,669	\$ 128,004	\$ 43,284	\$ 171,288	58.3%
323 Psychology / Behavior	\$ 10,292	\$ 4,110	\$ 12,000	\$ (2,000)	\$ 10,000	34.3%
330 Employee Training & Development	\$ 21,207	\$ 29,198	\$ 50,000	\$ (10,000)	\$ 40,000	58.4%
340 Legal	\$ 490	\$ 88	\$ 5,000	\$ 10,000	\$ 15,000	1.8%
350 Business Manager Services	\$ 77,000	\$ 56,000	\$ 84,000	\$ 2,520	\$ 86,520	66.7%
352 Audit Services	\$ 20,100	\$ 20,700	\$ 22,300	\$ -	\$ 22,300	92.8%
355 IT Services (ETS Monthly)	\$ 37,662	\$ 43,386	\$ 63,251	\$ 2,749	\$ 66,000	68.6%
Total 300:	\$ 308,482	\$ 239,615	\$ 421,692	\$ 29,416	\$ 451,108	56.8%
400 Purchased Property Services						
410 Garbage / Sewer / Water	\$ 48,276	\$ 29,593	\$ 60,000	\$ -	\$ 60,000	49.3%
430 Repairs / Maintenance / Monitoring	\$ 100,621	\$ 146,339	\$ 208,000	\$ (74,000)	\$ 134,000	70.4%
433 Cleaning & Custodial Services	\$ 65,307	\$ 47,496	\$ 72,000	\$ -	\$ 72,000	66.0%
435 Lawn Care & Snow Removal	\$ 21,310	\$ 21,033	\$ 30,000	\$ -	\$ 30,000	70.1%
443 Lease of Copy Machines	\$ 9,909	\$ 3,045	\$ 4,800	\$ -	\$ 4,800	63.4%
Total 400:	\$ 245,423	\$ 247,506	\$ 374,800	\$ (74,000)	\$ 300,800	66.0%
500 Other Purchase Services						
520 Property & Liability Insurances	\$ 33,637	\$ 31,591	\$ 37,000	\$ -	\$ 37,000	85.4%
530 Communication (Phone & Internet)	\$ 5,389	\$ 4,114	\$ 6,178	\$ -	\$ 6,178	66.6%
540 Marketing	\$ 8,830	\$ 5,084	\$ 10,000	\$ -	\$ 10,000	50.8%
542 Board Expenses	\$ 6,837	\$ 312	\$ 8,000	\$ -	\$ 8,000	3.9%
580 Travel / Per Diem	\$ -	\$ -	\$ 25,000	\$ (5,000)	\$ 20,000	0.0%
590 Field Trips (Bussing & Entrance Fees)	\$ 614	\$ 5,352	\$ 34,000	\$ (4,000)	\$ 30,000	15.7%
590 Student Activities - Aguilas Bussing	\$ -	\$ -	\$ 1,200	\$ -	\$ 1,200	0.0%
591 Sports (Bussing, Fees, Tri, Weight Training)	\$ 1,633	\$ 12,088	\$ 20,000	\$ (5,000)	\$ 15,000	60.4%
592 Trips	\$ -	\$ 14,758	\$ 44,482	\$ 75,518	\$ 120,000	33.2%
593 Clubs	\$ 1,494	\$ 1,957	\$ 4,991	\$ (491)	\$ 4,500	39.2%
Total 500:	\$ 58,434	\$ 75,256	\$ 190,851	\$ 61,027	\$ 251,878	39.4%

ACADEMY

Budget Detail Report	(1,040 Students)	(1,037 Students)	1037	(-7 Students)	1030	% of
	FY21 Actuals	FY22 Actuals	FY22 Forecast	Changes	FY23 Forecast	Forecast
600 Supplies and Materials						
611 SpEd Supplies	\$ 10,557	\$ 5,090	\$ 7,000	\$ -	\$ 7,000	72.7%
611 Classroom/ Legislative Supplies	\$ 33,014	\$ 18,320	\$ 38,000	\$ (8,000)	\$ 30,000	48.2%
611 Garden Grant	\$ 51	\$ -	\$ 755	\$ -	\$ 755	0.0%
611 Event Supplies	\$ -	\$ 1,506	\$ 6,000	\$ (1,000)	\$ 5,000	25.1%
612 Office Supplies	\$ 45,034	\$ 20,780	\$ 40,000	\$ (5,000)	\$ 35,000	52.0%
613 OPA Apparel / Concessions	\$ 7,581	\$ 13,306	\$ 20,000	\$ (5,000)	\$ 15,000	66.5%
614 Safety & Wellness	\$ 4,106	\$ -	\$ -	\$ -	\$ -	#DIV/0!
614 Staff Meals / Appreciation / Prof Dev	\$ 16,970	\$ 15,628	\$ 50,000	\$ (10,000)	\$ 40,000	31.3%
615 Counseling / Cultural Supplies	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!
616 Aguilas & 7 Habits	\$ 398	\$ 632	\$ 3,000	\$ -	\$ 3,000	21.1%
617 OPAPO	\$ 18	\$ -	\$ -	\$ -	\$ -	#DIV/0!
618 Art Expo	\$ -	\$ 139	\$ 2,700	\$ (300)	\$ 2,400	5.1%
619 Yearbooks	\$ 4,455	\$ -	\$ 6,790	\$ -	\$ 6,790	0.0%
621 Natural Gas	\$ 18,195	\$ 15,903	\$ 20,000	\$ -	\$ 20,000	79.5%
622 Electricity	\$ 57,079	\$ 46,529	\$ 80,000	\$ -	\$ 80,000	58.2%
630 Lunch Program Food & Supplies	\$ 321,514	\$ 290,692	\$ 440,000	\$ -	\$ 440,000	66.1%
641 Curriculum & Educational Software	\$ 71,360	\$ 93,230	\$ 130,000	\$ (20,000)	\$ 110,000	71.7%
644 Library	\$ 16,799	\$ 11,746	\$ 20,000	\$ (2,000)	\$ 18,000	58.7%
650 Technology Related Supplies	\$ 33,059	\$ 109	\$ -	\$ -	\$ -	#DIV/0!
680 Maintenance & Cleaning Supplies	\$ 23,489	\$ 12,441	\$ 30,000	\$ (15,000)	\$ 15,000	41.5%
Total 600:	\$ 663,679	\$ 546,051	\$ 894,245	\$ (66,300)	\$ 827,945	61.1%
700 Property, Equipment						
710 Land and Site Improvement	\$ -	\$ 19,517	\$ 123,000	\$ (73,000)	\$ 50,000	15.9%
733 Furniture and Fixtures	\$ 16,017	\$ 35,514	\$ 40,000	\$ -	\$ 40,000	88.8%
734 Technology-Related Hardware & Software	\$ 184,463	\$ 168,408	\$ 265,000	\$ (115,000)	\$ 150,000	63.6%
738 Kitchen Equipment	\$ 48,014	\$ 23,026	\$ 31,560	\$ 44,918	\$ 76,478	73.0%
Total 700:	\$ 248,494	\$ 246,465	\$ 459,560	\$ (143,082)	\$ 316,478	53.6%
800 Debt Service and Misc						
810 Dues and Fees	\$ 40,553	\$ 23,187	\$ 30,000	\$ -	\$ 30,000	77.3%
812 Banking Fees	\$ 2,046	\$ 1,566	\$ 3,000	\$ -	\$ 3,000	52.2%
850 Bond - Restricted Assets	\$ 942,135	\$ 629,004	\$ 978,842	\$ 100,000	\$ 1,078,842	64.3%
850 Bond Fees	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!
850 Contingency	\$ -	\$ -	\$ 20,000	\$ -	\$ 20,000	0.0%
890 Miscellaneous	\$ 11,338	\$ 64	\$ 1,000	\$ (1,000)	\$ -	6.4%
Total 800:	\$ 996,072	\$ 653,821	\$ 1,032,842	\$ 99,000	\$ 1,131,842	63.3%
Total Expenses:	\$ 8,730,824	\$ 6,774,965	\$ 10,591,792	\$ 456,837	\$ 11,048,629	64.0%
Net Income:	\$ 925,236	\$ (272,861)	\$ 329,829	\$ 224,287	\$ 554,116	
Reserve Funds Used in Year:				Goal 4.75%	\$ 551,130	Diff: \$ 2,986
Fund Reserve:						

Coversheet

Kitchen Equipment

Section:	II. Finance
Item:	E. Kitchen Equipment
Purpose:	Vote
Submitted by:	
Related Material:	Ogden_Prep_Academy.pdf



Quote

05/10/2022

COMMERCIAL KITCHEN SUPPLY

To:
Ogden Prep Academy
Debbie Deem
801-627-3066 (Contact)
ddeem@ogdenprep.org

Project:
Ogden Prep Academy

From:
Commercial Kitchen Supply
Keith Eubank
1030 West 650 North
Centerville, UT 84014-1710
(801)292-1611
801-292-1611 x101 (Contact)
801-243-1456 (Cell)
keubank@commercialkitchensuppl
y.com

Item	Qty	Description	Sell	Sell Total
1	1 ea	COMBI OVEN, GAS RATIONAL Model No. ICP 10-FULL NG 208/240V 1 PH (LM100EG) (CE1GRRRA.0000240) iCombi Pro® 10-Full Size Combi Oven, natural gas, (10) 18" x 26" sheet pan or (20) 12" x 20" steam pan or (10) 2/1 GN pan capacity, (5) stainless steel grids included, intelligent cooking system with (4) assistants; iDensityControl, iCookingSuite, iProductionManager, & iCareSystem, (6) operating modes, (5) cooking methods, (3) manual operating modes, 85° to 572°F temperature range, quick clean, care control, eco mode, 6-point core temperature probe, retractable hand shower, Ethernet interface, Wi-Fi enabled, includes (1) bucket of Active Green Cleaner & (1) bucket of Care Tabs, 152,000 BTU, 208/240v/60/1-ph, 6 ft. cord, 1.5 kW, IPX5, cCSAus, NSF, ENERGY STAR®	\$22,957.10	\$22,957.10
	1 ea	NOTE: All discounts subject to approval by manufacturer		
	1 ea	2 years parts and labor, 5 years steam generator warranty		
	1 ea	CAP Chef Assistance Program, a RATIONAL certified Chef conducts 4 hours/location specialized application training with personnel, no charge		
	1 ea	9999.2211 RCI RATIONAL Certified Installation, new certified installation for each individual gas table-top iCombi on a stand or counter (Do not use for Combi-Duo, Travel not included, See attached installation flyer for details) THIS ITEM IS NON-DISCOUNTABLE, USA ONLY (NET)	\$960.00	\$960.00
	1 ea	9999.1008 Standard Travel Zone Trip, first 50 miles (100 miles roundtrip), one trip is required for each day of a RATIONAL Installation (RCI) or Pre-Installation Placement (PIP). Up to four (4) cooking systems can be installed in one (1) working day. THIS ITEM IS NON-DISCOUNTABLE, USA ONLY (NET)	\$240.00	\$240.00
	1 ea	8720.1561US Installation Kit, for gas iCombi/SCC/CMP 102G (208-	\$777.60	\$777.60







Commercial Kitchen Supply

05/10/2022

Item	Qty	Description	Sell	Sell Total
		240/60/1ph); gas iCombi/SCC/CMP 201G (120/60/1ph); gas iCombi/SCC/CMP 202G (208-240/60/1ph) THIS ITEM IS NON-DISCOUNTABLE, USA ONLY (NET)		
	1 ea	1900.1154US Water Filtration Single Cartridge System, for any iVario, single Combi model, or XS or half-size Combi-Duos, includes: (1) single head with pressure gauge, R95H filter & filter installation kit	\$466.24	\$466.24
	1 ea	9999.2271 RCI RATIONAL Certified Installation, additional installation cost for a RATIONAL Water Filter System is available when purchased with Certified Installation of RATIONAL unit THIS ITEM IS NON-DISCOUNTABLE, USA ONLY (NET)	\$210.00	\$210.00
	1 ea	NOTE: The RATIONAL Water Filtration Systems helps provide consistent high quality water to your RATIONAL cooking systems. The patented carbon block technology reduces the effects of sediment, chloramines and chlorine while providing the required flow rates		
	1 ea	60.31.090 Stand I Stationary Oven Stand, 27-1/2"H, all sides open, stainless steel construction, for iCombi 6- and 10-full size Classic/Pro	\$622.61	\$622.61
		ITEM TOTAL:		\$26,233.55
1.1	1 ea	HOOD, CLASS II Captive-Aire Model No. HOOD, CLASS II Class II Condensate Hood, size per plans and specs, stainless steel, inside bottom gutter and opening for exhaust conduit centered in top	\$2,400.00	\$2,400.00
	1 ea	FAN, EXHAUST Exhaust fan with roof curb	\$1,140.00	\$1,140.00
		ITEM TOTAL:		\$3,540.00
2	3 ea	HEATED HOLDING PROOFING CABINET, MOBILE Metro Model No. C519-CFC-U C5™ 1 Series Heated Holding & Proofing Cabinet, mobile, full height, non-insulated, clear polycarbonate door, removable bottom mount control module, thermostat to 190°F, universal wire slides on 3" centers, adjustable on 1-1/2" increments (18) 18" x 26" or (34) 12" x 20" x 2-1/2" pan capacity, 5" casters (2 with brakes), aluminum, 120v/60/1-ph, 2.0kW, 16 amps, NEMA 5-20P, cULus, NSF	\$2,677.95	\$8,033.85
	3 ea	1 year warranty against manufacturing defects		
		ITEM TOTAL:		\$8,033.85
3	1 ea	REACH-IN FREEZER Atosa USA, Inc. Model No. MBF8504GR Atosa Freezer, reach-in, three-section, 81-9/10"W x 31-7/10"D x 83-1/10"H, bottom-mount self-contained refrigeration, 71.0 cu. ft., (3) locking hinged solid doors, digital temperature control, -8° to 0°F temperature range, (9) adjustable shelves, interior LED lighting, automatic evaporation, electric defrost, stainless steel interior & exterior, galvanized steel back, 4" casters, R290 Hydrocarbon refrigerant, 1 HP, 115/208-230v/60/1-ph, 5.5 amps, cord with NEMA L14-20P, cETLus, ETL-Sanitation	\$4,167.84	\$4,167.84
	1 ea	2 year labor & parts warranty, 5 years warranty on compressor		
	1 ea	Surcharge 22%	\$916.92	\$916.92
		ITEM TOTAL:		\$5,084.76
4	2 ea	REACH-IN REFRIGERATOR	\$3,620.64	\$7,241.28

Commercial Kitchen Supply

05/10/2022

Item	Qty	Description	Sell	Sell Total
		Atosa USA, Inc. Model No. MBF8508GR Atosa Refrigerator, reach-in, three-section, 81-9/10"W x 31-7/10"D x 83-1/10"H, bottom-mount self-contained refrigeration, 67.99 cu. ft., (3) locking hinged solid doors, digital temperature control, 33° to 40°F temperature range, (9) adjustable shelves, interior LED lighting, automatic evaporation, air defrost, stainless steel interior & exterior, galvanized steel back, 4" casters, R290 Hydrocarbon refrigerant, 1/4 HP, 115v/60/1-ph, 4.2 amps, cord with NEMA 5-15P, cETLus, ETL-Sanitation, ENERGY STAR®		
	2 ea	2 year labor & parts warranty, 5 years warranty on compressor		
	2 ea	Surcharge 22%	\$796.54	\$1,593.08
			ITEM TOTAL:	\$8,834.36
11	1 ea	HOT FOOD SERVING COUNTER / OPEN BASE	\$4,147.74	\$4,147.74
		Vollrath Model No. T38711 2-Series Affordable Portable™ Hot Food Station Deluxe, (4) well, 60"W x 28-5/8"D x 57-5/16"H (overall), with buffet style breath guard, open storage base, individual manual dial controls for each 480 watts thermostet sealed well (no spillage pans required), manifold drain, black vinyl-clad 20 gauge carbon steel base, (4) 4" swivel casters (2) braked, 120v/60/1-ph, 16 amps, cord with NEMA 5-20P, cULus, NSF, Made in USA, made to order, cannot be cancelled or returned		
	2 ea	NF39924 2-Series Affordable Portable™ Tray Slide, removable, non-folding, 24", 300 series stainless steel, made to order, cannot be cancelled or returned	\$519.43	\$1,038.86
			ITEM TOTAL:	\$5,186.60
12	1 ea	SERVING COUNTER, COLD FOOD OPEN BASE	\$6,661.60	\$6,661.60
		Vollrath Model No. R38717 2-Series Affordable Portable™ Refrigerated Cold Food Pan with black wrapper with easy access fully enclosed clear acrylic Buffet NSF2 Certified breath guard, 12" clearance, 60"W x 39-1/2"D x 35"H, open storage base, 4-pan size, 6" deep stainless well, 1" drain, MTO-15 working days plus day for order entry, with locking casters, 120v/60/1-ph, NEMA 5-15P, UL, NSF, Made in USA, made to order, cannot be cancelled or returned		
	2 ea	NF39924 2-Series Affordable Portable™ Tray Slide, removable, non-folding, 24", 300 series stainless steel, made to order, cannot be cancelled or returned	\$519.43	\$1,038.86
			ITEM TOTAL:	\$7,700.46
13	1 ea	MILK COOLER (SCRATCH & DENT)	\$1,500.00	<Optional>
		Beverage Air Model No. SM34HC-W School Milk Cooler, cold wall, normal temperature, 34"W x 30-5/8"D x 41-1/8"H, 12.73 cu. ft., single access, flat top carton capacities, (8) 13" x 13" x 11" or (4) 19" x 13" x 11" case capacity, self-latching doors/lids with safety bumpers, cylinder lock, wire floor racks, floor drain, electronic control, auto defrost, galvanized steel interior with stainless steel floor, white exterior, R290 Hydrocarbon refrigerant, 1/3 HP, cULus, UL EPH Classified, UL-Sanitation, Made in USA		
	1 ea	3 years parts & labor warranty (excludes maintenance items)		<Optional>
	1 ea	Self-Contained refrigeration		<Optional>

Initial: _____

Commercial Kitchen Supply

05/10/2022

Item	Qty	Description	Sell	Sell Total
	1 ea	Additional 4 years compressor warranty (part only), standard		<Optional>
	1 ea	115v/60/1-ph, 2.2 amps, cord with NEMA 5-15P		<Optional>
	1 ea	4" Heavy duty casters, (2) with brakes, standard		<Optional>
			ITEM TOTAL: <Optional>	\$1,500.00
			Merchandise	\$64,613.58
			Freight	\$650.00
			Installation	\$4,000.00
			Tax 7.25%	\$4,731.61
			Total	\$73,995.19

Acceptance: _____ Date: _____

Printed Name: _____

Project Grand Total: \$73,995.19

Coversheet

Employee Retention Tax Credit RFP

Section: II. Finance
Item: G. Employee Retention Tax Credit RFP
Purpose: Vote
Submitted by:
Related Material:
B10 ERC Narrative Proposal for Ogden Preparatory Academy.pdf
B10 ERC Cost Proposal for Ogden Preparatory Academy.pdf



B10 CAPITAL

Confidential & Proprietary Information
Copyright © 2022 - Not for Distribution

NARRATIVE SERVICES PROPOSAL

FOR CONSIDERATION OF:

Ogden Preparatory Academy
Attention: Debbie Deem
1435 Lincoln Ave Ogden, UT 84404
Phone: 801-627-2066 Email: ddeem@ogdenprep.org

LETTER OF INTRODUCTION

CONTRACTOR INFORMATION

<u>C</u>			<u>S:</u>
B10 Capital	Parrish Pellegrino	42 N 650 W	
Founded in 2017	917.353.3734	Suite B	
In Operation Over Five	parrishp@b10cap.com	Farmington, UT	
(5) Years	www.b10cap.com	84025	

OPENING STATEMENT

We have had the honor of assisting hundreds of companies in qualifying for this credit to secure funds as an aid in revitalizing their pandemic-impacted businesses. We have achieved this by employing a proprietary process developed by B10's expert team of tax attorneys, CPAs and analysts. Our method not only results in qualifying your business or organization for the maximum allowable credit, but does so with the highest levels of ethics and available IRS guidance.

CONTRACTOR PROFILE

B10 Capital is a national full-service specialty tax and strategy firm with offices in Utah, Arizona, Illinois, Texas, and Idaho. Our team is composed of credentialed specialty tax and legal experts with narrow and deep focus in the areas of tax credits, specialty tax deductions, and corporate tax strategy.

CPA firms nationwide in the US trust B10 Capital as their preferred fulfillment partner for specialty tax services like tax credits, tax deductions, and corporate tax strategy. We are trusted by our CPA firm partners because of our focus on in-house expertise, deep specialty focus and skill, and its full-service holistic approach to tax credit calculations, compliance, methodology documentation, review, legal defense, claim documentation, forms, filings, and post-filing support.

B10 Capital Credentialed In-House Executive Management

- Ginger Harris: MBA / Masters of Business Administration Brigham Young University
- Don Steeves: CPA / MAcc Taxation Brigham Young University
- Duncan Glenn: CPA / MAcc Taxation Brigham Young University
- Scott Stratton: Attorney / Juris Doctorate Texas Tech University Law
- Ephraim Olson: Attorney / Juris Doctorate Harvard University Law / LL.M. Taxation New York University

We understand the significance of having in-house leadership, operational fulfillment, and compliance in the accounting and legal disciplines of taxation. Our clients benefit from an in-house team that performs a full-service holistic approach to tax credit calculations, compliance, methodology documentation, review, legal defense, claim documentation, forms, filings, and post-filing support. Our leadership, with a specific emphasis in tax credits, have been operating in that specific, focused discipline for over 10 years.

We have the relevant administrative, management, and financial capabilities as well as the technical skills, qualifications, credentials, and expertise necessary and appropriate to successfully complete the proposed project and meet the objectives of the RFP.

SPECIFIC PROJECT QUALIFICATIONS

In-House Education Credentials: Master of Taxation (MAcc), Juris Doctorate Law Degrees, Masters of Taxation Law Degrees, Masters of Business Administration (MBA)

- Total Client ERC Credits Claimed: Over \$150+m
- Total Signed-Engagement Client ERC Credits in Pipeline: 100+
- Total Signed-Intent Charter Schools: 14

SIMILAR PROJECT HISTORY / CHARTER SCHOOLS

Our ERC client base includes numerous charter schools in various states. As such, B10 is extremely familiar with general charter school operations and we have a deep understanding regarding the common aspects in which charter schools have been impacted by the global pandemic. This enables us to offer a number of unique benefits to this sector, including additional layers of expertise, as well as a highly tailored and streamlined ERC process. As a result, we are able to greatly reduce the burden and contribution required by the schools themselves otherwise needed to navigate the extremely complicated and often confusing ERC qualification and preparation requirements.

Our expertise allows us to be a leading firm in non-revenue ERC qualification and compliance. Many firms avoid claiming ERC credits based on non-revenue qualifiers due to the added expertise, required resources, documentation, analysis, and support required. Our firm specializes in providing the additional expertise, required resources, documentation, analysis, and support required.

REFERENCES

While B10 has many satisfied ERC clients. Unfortunately, due to the sensitive nature of tax services and the strict non-disclosure assurances we provide our clients with, we are only able to provide references when a bilateral agreement is put in place. This can be discussed further if deemed necessary.

PROPOSED PROJECT TIMELINE AND PROCESS

TIMELINE

1. Intake will be reviewed within 2-4 business days.
2. Initial qualification and estimates are typically processed within 10-14 days once documents are received in full.
3. Final review and filing are typically completed within 7 business days of our service agreement being signed.
4. The IRS has stated that it will take 45 days to process ERC filings. Unfortunately, we have not observed this is practical application, instead seeing clients receive their checks in as little as 3 months, with 6-9 months being a more common average.

PROCESS

1. Intake: You will be asked to fill out an intake form to provide some important basic details about your company, as well as an overview of how your business was affected by the pandemic.
2. Discovery call: We will have a 15 to 30 minute call or virtual meeting for the purpose of:
 - a. Covering any questions or clarifications needed to complete your client profile.
 - b. Discuss any client queries or concerns.
 - c. Offer an initial opinion on probable qualification.
 - d. In some cases, we can also provide a rough initial approximation of the possible credit.
3. Document collection: Once your intake is completed you will be sent a document request. In order to properly calculate your ERC estimate, it will be necessary to confidentially collect certain documents through a secure process. These documents and data will be internally reviewed by the B10 team and will primarily include 2020 & 2021 revenue data, payroll reports, 941 filings, payroll-related expenses data, as well as any PPP details.
4. Assessment Process. Once the requested documents are received in full and accurately, our team of experts will then be able to analyze the provided information to ascertain the following:
 - a. If your business or organization officially qualifies by revenue impact, mandate impact, or as a recovery business (having commenced operations after Feb 15, 2020)
 - b. Credit amount estimates by quarter
 - c. If qualifying by non-revenue mandate impact, any further information needed to build your Covid impact statement and support deck.

There may be instances at this stage where we find it necessary to arrange a call or virtual meeting to speak with one of our analysts to provide needed clarifications and/or elaborate on Covid mandate impact details.

5. Analyses results: We will email you our findings, which will include your estimates and any related remarks for your review. You will be asked at this time to arrange a call or meeting time to collectively review our findings and discuss next steps.
6. Service Agreement: Once a decision has been reached to proceed with your filing, you will be provided with our service agreements. This is a standard tax services agreement that verifies your estimate and fee specifications, as well as filing authorizations, balanced protections and standard terms.
7. IRS Audit Support Deck (for non-revenue qualifying clients): B10's services include full audit support for the 5-year period in which the IRS has to review ERC filings. As a premium additional service, we will develop a comprehensive support deck. Our team of experts will take the lead with on developing this with the assistance of the client. This will typically comprise of quarter-by-quarter impact details, corresponding City/State/Federal mandates and an overall

impact narrative. This deck will preemptively be kept on file in the event the IRS chooses to perform an audit.

8. Final audit and filing. Once the agreement is signed, we will advance your file to comprehensive final review. There may be some instances where this final review ends up indicating a final filing amount that differs from the initial estimate. In such cases, this is commonly a result of client preference or data that was initial submitted later being revised.

You will at this time be provided with the final filing amounts, together with IRS filing authorization and 941x amendments for signature. Once signed your filing will be mailed to the IRS for processing to complete the project.



B10 CAPITAL

Confidential & Proprietary Information
Copyright © 2022 - Not for Distribution

PAYMENT FOR SERVICES PROPOSAL

FOR CONSIDERATION OF:

Ogden Preparatory Academy
Attention: Debbie Deem
1435 Lincoln Ave Ogden, UT 84404
Phone: 801-627-2066 Email: ddeem@ogdenprep.org

PAYMENT

B10 charges a 15% service fee against the total ERC amount we file for the client for our premium ERC services. We offer flexible payment terms in collecting this fee to accommodate various circumstances and limitations.

SERVICE INCLUSIONS

- Intake consolation
- Initial qualification and estimate analysis
- Finding's consultation
- Assisted support deck development
- Final review and audit
- IRS documentation preparation and filing
- Full audit support for 5-year IRS lookback period

Coversheet

Medicaid Support System

Section: II. Finance
Item: H. Medicaid Support System
Purpose: Vote
Submitted by:
Related Material: Documentation Review October 2021.ppt
October 2021 Annual Training.ppt
Medicaid service provider comparison form.pdf



Medicaid & School Based Skills Development

Documentation Reviews

- The goal of these reviews is to identify district strengths, potential problems, and areas where additional training is needed. We want to streamline School-Based Medicaid processes across all of the districts.



Documentation Reviews



What are they and why are we doing them?

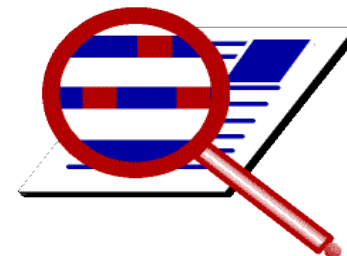


- When a claim is sent to us, we do not know what was stated in the IEP, who performed the service, what the service was, and how much time was spent rendering the service
- We need to ensure that eligible services are billed for, that qualified personnel are rendering those services, and that those services have been documented appropriately
- To make sure that we are doing our due diligence, we are conducting reviews
- During the reviews we will look at specific documentation kept by the district to ensure a Medicaid covered service was rendered correctly

What Does This Mean For My District?



- Each district will be reviewed once every 2.5 years, unless decided otherwise by the Department of Health
- The Department will review 8 districts bi-annually
- The review will be done on site with the district if possible. If not, the review will be done by phone, email, or mail
- The Department will randomly choose 5 clean claims submitted by the district within the past year to review
- The TCN #s, names of the students, dates for review, and instructions will be sent to the district two weeks ahead of the review date



What are we looking for?



We are looking for documentation that tells us the following:

1. That the specific Medicaid covered service and time are stated in the student's IEP
2. That the district billed according to the total monthly days attended, per the district's official attendance record
3. That the rendered Medicaid covered service was documented
4. That the documentation states the amount of time spent rendering each service
5. Whether or not the services rendered match the services stated in the IEP
6. Whether or not the documentation clearly states the rendering provider and **is signed and dated by the rendering provider**



What are we looking for?

7. Whether or not the provider is qualified or licensed properly
8. That supervision is properly documented:
 - The rendering provider and the supervising provider both state their names and signed and dated the documentation
 - That the supervising provider and rendering provider are clearly identified
9. That physician orders are on file when applicable
10. That the documentation includes clinical details



Time on Documentation

****We need to see that the time stated for a service in the IEP matches the time outlined on the documentation**

How is this done?

The documentation must state the duration of time spent rendering the service

What if I am billing for time?

When billing for time, such as with nursing services, it is crucial that the documentation state the amount of time spent rendering the service.

****If we cannot verify that the total number of units billed matches what was actually rendered, there may be a take back**



Supervision of Services

Supervision must take place when an unqualified provider renders services

Who must be supervised?

All providers stated as needing supervision in Appendix A Provider Chart of the School Based Skills Development Provider Manual

How is proper supervision proven?

The documentation must clearly state both the rendering provider and the supervising providers and be signed and dated by both

**** if proper supervision of services is not demonstrated, there may be a take back**



Teachers and Services Rendered

What services can Special Education teachers render?

A Special Education teacher may render all services except itinerant nursing services

What services can Special Education teachers supervise?

A Special Education teacher may only supervise personal care and behavioral services

When does a Special Education teacher need to be supervised by someone else?

When rendering any service that is not considered personal care or behavioral

How is this supervision demonstrated?

Whether a teacher is supervising or being supervised, the documentation must clearly state both the rendering and supervising providers, and be signed and dated by both

****if proper supervision of services is not demonstrated, there may be a take back**



Electronic Signatures

Electronic signatures on documentation are acceptable when the district has a system to maintain an auditable signature record, and when the district has a way to protect against modification of the document after it has been signed



Personal Care and Behavior Documentation

Personal care and behavior are stated as two separate services in the School-Based Skills Development Provider Manual and must be stated as separate services in the student's IEP

The district may choose to document these services separately

If the district chooses to document both of these services on the same form, chart, etc., both of these services must be stated separately in the IEP

Below is an example of how this may create a payback situation if not done properly:

Johnny's IEP states that he received personal care services. The district turned in a personal care log, but it shows that only behavioral health services were rendered. This would be a payback for Medicaid since the only service rendered was not stated in the IEP.

Goals and Progress Notes



Goals and progress notes are not sufficient by themselves to demonstrate that a Medicaid covered service was rendered

Goals only show what a district hopes will happen with the services that a student receives

Progress notes show that progress was made in a specific area but do not demonstrate the specific Medicaid covered activities that were performed with the student to ensure that the progress was made

There may be times when progress notes or goals are examined or requested to help clarify services already documented in IEPs and on service documentation

Policy Reference



The 1997 Medicaid and School Health: A Technical Assistance Guide, page 41 states:

Documentation

A school, as a provider, must keep organized and confidential records that details client specific information regarding all specific services provided for each individual recipient of services and retain those records for review. In addition, all of the screening elements of an EPSDT screening must be documented as it is not sufficient to indicate just one of the elements. Relevant documentation includes the dates of service, who provided the service, where the service was provided, any required medical documentation related to the diagnosis or medical condition of the recipient, length of time required for service if relevant, and third party billing information. This information will be necessary in the event of an audit and will also be helpful in the event it is necessary to adjust the rates in the future.

Policy Reference



The 1997 Medicaid and School Health: A Technical Assistance Guide, page 14 states:

As schools and school districts are aware, under Part B of IDEA, school districts must prepare an IEP for each child which specifies all special education and “related services” needed by the child. The Medicaid program can pay for some of the “health related services” required by Part B of IDEA **in an IEP**, if they are among the services specified in Medicaid law. In addition, the services must be included in the state’s Medicaid plan or available through the EPSDT benefit.

Common District Errors

The following errors are common across all districts:

Districts are billing for students without a Medicaid covered service stated in the IEP

Districts are billing for months when no Medicaid service was rendered

Districts are billing for months when there is no IEP in place

Districts are not keeping the required documentation for services rendered

Districts are not indicating the type of service on the documentation



MISTAKE

Common District Errors

Districts are not indicating the amount of time spent rendering the service

Districts are not indicating the rendering provider on the documentation

Districts are billing for more days than the student attended Special Education

Districts are not enforcing or are not maintaining documentation of supervision of services

Districts are maintaining documentation that is not signed or dated



Post Review Process

- This will include education and training
- The report findings will be communicated to the district through a written summary
- If training is needed, this will be done through another onsite visit or conference calls
- If a follow-up review is needed, we will communicate this to the district
- We will also identify areas where all of the districts may benefit from training. This sort of training may take place during Medicaid Coordinator meetings, through mass emails, written correspondence, annual meetings etc.

IEP Review

At any time, if it is determined that a district is billing for students who did not meet the IEP criteria to bill, a larger IEP Review will be conducted

Criteria: 1. The IEP must state a Medicaid covered service in either the Related Services or Special Education section



IEP Review Process

If the district is billing for students who do not meet the criteria, the Department of Health will request a copy of every IEP billed for every student during the prior three complete school years

Example: If the discovery is made in February 2018, we will request all of the IEPs from the 2014-15, 2015-16, and 2016-17 school years.

Review Process: Once the IEPs have been received, every IEP will be reviewed. We will review the following:

- We will check the Related Service and Special Education sections to verify that a Medicaid covered service is stated

Contact Information

Kelly Garcia School-Based Skills Development Program
Manager 801-538-6945 kgarcia@utah.gov

Greg Trollan Director, Bureau of Managed Healthcare 801-
538-6088 gtrollan@utah.gov





Medicaid & School-Based Skills Development

October 2021

Medicaid Coverage



Coverage is available when the services are:

- Provided to a Medicaid eligible student through a Medicaid enrolled provider
- Identified as a Medicaid covered related service in an eligible student's IEP
- Specifically designed to enhance a student's health and functional abilities and/or prevent further deterioration
- Necessary to assist the individual to benefit from special education



Procedure and Diagnosis Codes

The School-Based Skills Development Program Uses 3 Procedure Codes:

- Code T1018 is used for the bundled services at a maximum of 23 monthly units
- Code T1002 is the RN code. It is used for itinerant nursing services and is billed in 15 minute increments
- Code T1003 is the LPN code, also used for itinerant nursing service, and is also billed in 15 minute increments

This Program Uses two Diagnosis Codes:

- F89 is used for behavioral services
- F8189 is used for non-behavioral services

*** Beginning July 1, 2022, districts will start using a diagnosis code for each service rendered

District Payment



- As of 7/1/2021 districts no longer receive payments based on submitted claims
- Districts will receive monthly payments based on their submitted costs
- Districts will report their costs to PCG annually
- Districts must continue to submit claims for all services rendered
- Claims with dates of service 7/1/2021 and forward must be submitted with a \$.01 charge per line on the claim



Billing Authority

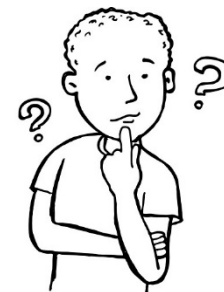


The LEA, along with the education authority, is responsible to ensure that it is legally authorized to submit a claim to Medicaid in accordance with state and federal laws

Student Eligibility



- Every student must have a Medicaid ID # in order to bill*
- Student eligibility can change monthly. It's necessary to check a student's eligibility before billing for services
- Checking eligibility frequently may identify new eligible students and previously eligible students who are now ineligible
- Eligibility may be checked whenever necessary through the Eligibility Lookup Tool at medicaid.utah.gov, or through Access Now
- The Program Manager may also help with longer student lists. Please send an excel file in this format:
 - a. Column 1 must have the student last names
 - b. Column 2 must have the student first names
 - c. Column 3 must have the student dates of birth



12 Month Timely Filing



- All claims and adjustments for services must be received by Medicaid within 365 days from the date of service. The start date for determining the 1-year timely filing period is the date of service or “from” date on the claim
- To avoid any timely filing issues, it is strongly recommended to bill frequently, monthly if possible



Adjusting Claims

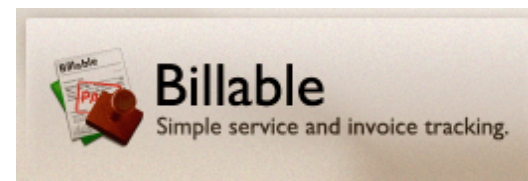
- It is important to submit a replacement or corrected claim when adjusting an already submitted claim
- Submitting a new claim when a claim with the exact same information has been submitted previously, will result in a duplicate claim and will be denied
- Claims submitted or adjusted by Thursday will be processed over the weekend



Medicaid Covered Services



- Evaluation and Assessment
- Motor Skills Development
Example: occupational therapy and physical therapy
- Communication Skills Development
Example: speech language pathology
- Personal Care Services
Example: toileting, diapering, eating, hand washing
- Behavioral Health Services
Example: Counseling, behavioral redirection, psychological services
- Vision and Hearing Adaptation Services
Example: Orientation and Mobility



** These services are billed using the bundled service code T1018**

Medicaid Services Continued



Itinerant Nursing Services

These are nursing services provided to medically fragile children who require continuous one-to-one skilled nursing care throughout their day. These services are provided in accordance with physician orders. These services include:

- Catheterization
- Care and maintenance of tracheotomies
- Prescription medication administration
- Oxygen administration
- Tube feedings
- Suctioning
- Ventilator care
- Evaluations and assessments

**** These services are billed using T1002 for RN or T1003 for LPN****

Billing Nursing Services and Transportation



Districts may bill for nursing services performed during transportation when deemed appropriate. The guidelines for billing nursing and transportation are as follows:

- The total number of nursing minutes stated in the IEP must include both the total nursing minutes and the total transportation time
- Simply stating transportation or checking a box on the IEP for transportation is not sufficient to bill the nursing rate for the transportation
- The transportation must be clearly linked to itinerant nursing services stated in the IEP in order to bill the nursing rate for the transportation

Billing for Extended School Year



UTAH DEPARTMENT OF
HEALTH

If a student qualifies for extended school year services (ESY) per the requirements set forth in IDEA, a district may bill Medicaid for medical services

The following rules apply:

- ESY services must be stated in the student's IEP
- The student must receive a Medicaid covered related service during the ESY program
- The student must be eligible for Medicaid on the dates that services are provided

Categories of Service and Plans



Several IEPs state Categories of Services and Plans. The district may not bill Medicaid for a Category of Service or a Plan. Examples of these are:

- Social Skills, Life Skills, Functional Skills
- Transition, Self-Help
- Daily Living Skills, BIP, Health Plan, Health Services, Etc



Although services rendered in a specific category might be implied on the education side, they are not clear, nor implied to the Department of Health

- Ask this question- Does Medicaid know the exact service it is paying for by simply reading the IEP?

The specific Medicaid covered services, as specified in the School-Based Provider Manual, must be stated in the Related Service section the IEP in order to be paid for a student

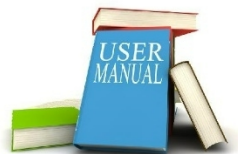
Non-billable Services



Transportation: A district cannot bill solely for transportation. There must be a Medicaid covered service stated in the student's IEP.

Interpretation/Translation: A district cannot bill solely for interpretation or translation. There must be a Medicaid covered service stated in the student's IEP for the which the interpretation or translation service is being used.

Other Non-Covered Services as outlined in section 2-2 of the School-Based Skills Development Provider Manual





“Just one question: Is it billable?”

Documentation for Billing Purposes



Documentation must be kept for all claims sent to Medicaid and must include clinical details

What should be documented?

Student IEPs

The student's IEP must state the Medicaid covered service to be rendered and the amount of time to be spent rendering the service. If a Medicaid covered service is not stated in the IEP, the district cannot bill Medicaid.

- Per the School-Based Provider Manual Section 1-3 Program Eligibility (A)(2) and the 2021-2026 contract section 6.2

Rendered Service Documentation must address the following:

- State the Medicaid covered service that was rendered
- Include clinical documentation outlining the activities performed when rendering the service
- State the amount of time spent rendering the service
- State the provider who rendered the service, with a provider signature
- Provider supervision must be documented with the service and have the supervising provider's signature

Claim Suspensions



Throughout the year, there are different times when a district's claims may be suspended:

- If the prepayment of the quarterly state match is not met by the due date
- If the administrative fee invoiced prior to the 4th quarter is not paid timely
- If a payback on the quarterly reconciliation of the state match is not paid timely
- If the July Old payment or July Old reconciliation payment is not met timely
- If the district's annual financial report (December report) is not turned in timely
- If there is any other reason that the Department deems a suspension as necessary

**claims that are suspended remain on hold until the issue is resolved and then will be processed as they normally would

**** If there are ever questions about any of these payments or about a suspension, please contact the the School Based Program Manager****



IEP General Information

In order to bill Medicaid, there are specific things to remember when creating an IEP:

- Medicaid covered services must be put in the Related Services section (or Special Education Section when the related service is the only service)
- The district cannot bill for Medicaid covered services that are put in the Program Modifications/Accommodations section
- Do not bill Medicaid for service categories, such as: Self Help, Daily Living Skills, Functional Skills, etc. These categories do not tell Medicaid that a Medicaid covered service is being rendered

Program Reminders



It is ultimately the district's responsibility to monitor this program and ensure compliance

- If a student stops receiving Medicaid covered services, the district must stop billing for that student
- If the student does not have a Medicaid covered service stated in the IEP, the district cannot bill for that student
- All documentation pertinent to a claim must be kept for a period of 5 years or the district may have a take back
- Documentation must be kept at the beginning and end of the school year, this includes services rendered in August and June

Contact Information



- Medicaid School-Based Program Manager

- Kelly Garcia 801-538-6945 kgarcia@utah.gov

- Bureau Director

- Gregory Trollan 801-538-6088 gtrollan@utah.gov





Questions





Official Form of Ogden Preparatory Academy

3. Fiscal Management

3.06.TPL.1 Procurement Comparison Form

Effective/Revision Date: 05/11/2020

Page 1 of 3

Item(s) and/or Service(s) being procured

Medicaid service tracking and billing systems

Note: "Bundled billing" is Utah's current model. Several services for a student can be submitted as a single claim under this model, but it requires attendance data to be submitted with the claim. "Unbundled billing", which is the model Utah is ostensibly moving toward, each service needs to be submitted as a separate claim. Manual billing on our part would likely require an additional secretary.

Vendor #1	Total Cost/time frame	Date Received
Embrace IEP	\$1238.40/ year + \$1,500 implementation cost and \$500 web training	3/11/2022
Contact Name	Contact Number/Email	Website/other
Patricia Grogis	(888) 437-9326 trish.grogis@embraceeducation.com	www.embraceeducation.com

Specific Characteristics of Proposal

Current special education/ 504/ BIP program. Annual cost includes service time logging for related service providers only, but can be used for all students with related services, whether they have medicaid or not. Can pull service minutes from IEPs within the system and autogenerate accuracy reports for tracking purposes. Embrace does not coordinate with Aspire, so we would have to manually enter attendance data, which is currently a requirement of Utah's medicaid system for schools (bundled billing). This may change on Jul 1, 2022. Embrace will not check for student eligibility. No revenue projections provided.

Vendor #2	Total Cost	Date Received
Compuclaim	\$7000/year (base) \$9,000/ year (Flex- with colorful reporting)	03/17/2022
Contact Name	Contact Number/Email	Website/other
Tiffany Guinan	203-408-2079 tguinan@compuclaim.com	www.compuclaim.com

Specific Characteristics of Proposal

Standalone system, but will integrate with Embrace and coordinates with Aspire for bundled billing. Checks for student eligibility, and provides a medicaid liaison who will support myself and my secretary in training and reporting. System provides option to log all service times, including academic minutes (non-billable minutes). Minutes can be logged by any provider, including trained TA's, Speech and OT assistants, with supervisors required to log in and verify times. Based on comparison districts with similar caseloads, anticipated revenue is \$25,000 to \$40,000 a year.

Vendor #3	Total Cost	Date Received
Public consulting group	7% of total interim payment (approximately \$2,800 + \$2,000 implementation fee)	3/29/22
Contact Name	Contact Number/Email	Website/other
Lindsay Bull	405.514.9931 lbull@pcgus.com	publicconsultinggroup.com
Specific Characteristics of Proposal		
No information provided yet.		

Vendor #3	Total Cost	Date Received
Panorama	No additional cost	3/11/2022
Contact Name	Contact Number/Email	Website/other
?	?	?
Specific Characteristics of Proposal		
Panorama contains the ability to track service minutes as interventions, but does not have the ability to bill to Medicaid. We could do manual reporting to gain the revenues, but this is labor intensive. In addition, no simple way exists to differentiate Sped minutes from classroom or tiered (MTSS) interventions. Service logs would need to be manually sorted, and I'm not certain yet what this would look like.		

Specific documents to support bids should be attached to this form.

- Check if a second form is attached for additional vendor proposals. If completing digitally, additional vendor fields may be copied and pasted above in lieu of an additional form.

OPA Employee Contact Name	Date of Review
Elizabeth Callison	03/18/2022
Considerations for Decision	
- Consistent tracking mechanisms- the school does not currently have a digital means of tracking service	

3.06.TPL.1 Procurement Comparison Form	
Effective/Revision Date: 05/11/2020	Page 2 of 3

minutes. Having a single system would ensure consistency of data and ease of reporting should a compliance issue or parent question arise. Though we require service time documentation, this is currently sporadic and information provided is inconsistent. Compuclaim provides this ability.

- Embrace is currently not enrolling clients in Utah due to bundled billing- they are unsure when they will be accepting new medicaid billing clients. From my understanding, no final determination on bundled billing has been made by the legislature.
- I reached out to Public Consulting Group on 3/7/2022. According to members of my Sped Charter Director’s group who have received quotes, they charge high and their service is at best mediocre. However, the state says we HAVE to work with PCG in order to do the time study (see attached state trainings).
- Compuclaim has been around for billing and data management since 1993. They have a well-respected name. Their demo displayed ease of use compared to Embrace, despite the familiarity of the Embrace system.

Vendor Selected	Date of Approval
Compuclaim	

Document History

Approved: 05/11/2020

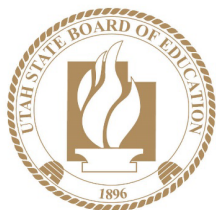
Legal References

3.06.TPL.1 Procurement Comparison Form	
Effective/Revision Date: 05/11/2020	Page 3 of 3

Coversheet

Administrative Board Report

Section: IV. Administrative Report
Item: A. Administrative Board Report
Purpose: Discuss
Submitted by:
Related Material: 68-Ogden Prep.pdf
Administrative Board Report 05.19.2022.pdf



UTAH STATE BOARD OF EDUCATION

Mark Huntsman, Chair	Laura Belnap, First Vice Chair	Cindy Davis, Second Vice Chair
Randy Boothe	Scott L. Hansen	Carol Barlow Lear
Janet A. Cannon	Molly Hart	James Moss Jr.
Natalie Cline	Stacey Hutchings	Kristan Norton
Jennie Earl	Matt Hymas	Brent J. Strate

Sydnee Dickson, State Superintendent of Public Instruction
Cybil Child, Secretary to the Board

April 29, 2022

Debbie Deem, Principal
Ogden Preparatory Academy (68)

Dear Debbie Deem:

The Financial Operations section of the Utah State Board of Education (USBE) has completed its annual review of your LEA’s fiscal year 2021 annual financial report (AFR), annual program report (APR), audited financial statements, single audit (if applicable), and management letter.

These annual reviews are conducted as part of USBE’s responsibility to verify audits of financial records in accordance with Utah Code Annotated (U.C.A.) § 53E-3-603 and compliance with minimum standards for financial reporting in accordance with U.C.A. § 53E-3-501. These reviews were also conducted in accordance with the OMB Uniform Guidance Audit Act and are part of USBE’s responsibility for sub-recipient monitoring of federal grant funds. 2 CFR part 200.521 requires USBE to issue a management decision for audit findings that relate to federal awards made to our sub-recipients. This communication serves that purpose. This communication is not an evaluation or endorsement of financial health, nor does it represent the views of other state agencies or entities. Further oversight and review may occur.

Based on our review of your LEA’s financial statements, single audit (if applicable), and management letter, there were no noted material weaknesses, significant deficiencies, or other matters of non-compliance that require follow-up from your fiscal year 2021 audit.

If you have any questions pertaining to school finance, your audit, or federal requirements, please feel free to contact us at the phone numbers below or at schoolfinance@schools.utah.gov.

Sincerely,

Scott Jones
Deputy Superintendent of
Operations
Utah State Board of Education
(801) 538-7615

Sam Urie
School Finance Director
Utah State Board of Education
Financial Operations
(801) 538-7667

Brett Baltazar
School Finance Manager
Utah State Board of Education
Financial Operations
(801) 538-7802

cc: **Stefanie Zwygart, Board Chair**



OGDEN PREPARATORY ACADEMY

Monthly Administrative Board Report

Date: May 19, 2022

Events

1. Recent Events

- a. April 21: Great Shake Out drill
- b. April 28: Family Celebration
- c. May 13: Virtual Day

2. Upcoming Events

- a. May 24 & 25: Elementary Field Days
- b. May 25: Jr. High Lagoon Day
- c. May 26-27: Half days
- d. June 20-July 1: Jr. High Summer JumpStart Academy
- e. July 5-21: Elementary JumpStart Academy

Academics

1. Extended Learning

- a. Afterschool Opportunities
 - i. Junior High: Drop-in program for students. Student athletes are required to attend should they fall below eligibility requirements. We have three after-school tutors and average about 15 students per session, not including student athletes. The tutors have refined the process of how they work with students and are finding more success. Mr. Zundel tracks the amount of time in tutoring and how that impacts grades.
 - ii. Elementary:
 1. Staff is in place for next year
 2. Currently working on creating new lottery system for the FY23 school year
 - a. Will pull from this lottery on August 3
- b. Summer Jumpstart Academy
 - i. Elementary signups end May 20
 1. 1-2 Grades
 - a. 42
 2. 3-4 Grades

- a. 13
 - 3. 5-6 Grades
 - a. 14
- 2. End of Year Assessments
 - a. Testing is Complete!
 - b. Teachers and administration participated in a data dive for all assessments on May 13
- 3. Fridays at the Junior High
 - a. Junior High will not continue Friday C-days for the 2022-23 school year.
 - b. 5x5 schedule allows for Math and ELA daily.
 - c. A days: Monday/Wednesday; B days: Tuesday/Thursday. Fridays will alternate and adjust based on the calendar to balance the numbers.
- 4. Schedule
 - a. Students have requested their courses for 2022-2023. Teachers are in the process of reviewing applications.

Signature Programs

- 1. AVID (Advancement Via Individual Determination)
 - a. We have scheduled a career day for all students and will be asking for presenters.
- 2. LIA (Latinos in Action)
 - a. This year's LIA conference went well and our AVID Leaders were given special recognition.
- 3. Leader in Me
 - a. Schoolwide Goals
 - i. Reading - 80% of students will read 20 minutes, 5 days per week
 - ii. Math - 80% of students will complete the weekly grade level-recommended time on a school math program (i-Ready, Zearn, etc.)
 - b. LIM lessons taught weekly in every classroom
 - i. Mrs. Torres sends out a prepared lesson to the teachers each week that is grade level appropriate
 - 1. Teachers designate time to complete the lesson each week
 - 2. Some take all week, others do it all at once and reference the topic throughout the week
- 4. OPA Athletics
 - a. Boys soccer season is completed. We came in 2nd after the championship game on May 13th against Mount Ogden.

Finance and Compliance

1. Accreditation
 - a. Our Accreditation was approved for a 6 year term.
2. Submissions
 - a. UCAP SCSB Annual Certification completed.
 - b. Trust Land reports and budgets have been submitted.
 - c. COVID closure report was submitted.
 - d. College and Career Awareness annual report and budget were submitted.
 - e. STEM Math intervention software grant was submitted.
3. Finance
 - a. PTIF 04/01-04/30:
 - i. Ending Balance: \$2,677,542.75
 - ii. Interest earned March: \$1,369.12
 - iii. Transfers: none
 - b. Audit report was returned. There were no material weaknesses, significant deficiencies, or other matters of non-compliance noted by your external auditors that require follow-up. (letter attached)

Operations

1. Early Childhood Center
 - a. Spencer, Jeff Beisinger, and I are meeting with the Round Table Funding team weekly to review progress.
 - b. Weekly design meetings. I meet with the designer and construction team each week. We have completed preliminary floor plans and have met with Ogden City to start the permitting process.
2. COVID and Quarantines
 - a. Continue to follow the WMHD and UDOH guidelines.
 - i. We have testing kits and N95 masks available for students and staff.
 - ii. Interruptions due to COVID have been minimal.
 - b. We will continue to post numbers on the website through the end of the school year.
3. Human Resources
 - a. Teacher Retention Rate: 89.47%
 - b. Teaching Positions for 2022-2023;
 - i. 2nd Grade. Leaving: Lynnette Gittins; New: Emma Draper
 - ii. 3rd Grade: Leaving: Christina McKay; New: Julie Avellino
 - iii. 5th Grade: Reassigned: Emma Draper; New: Shelby Benson
 - iv. 6th Grade: Leaving: Bethany Lovelady; New: Roxanna Zazueta
 - v. Photography: Leaving: Zach Ordonez; New: John Hampton
 - vi. Math: Leaving: Malamene Wong; New: Kimberlee Duffin and Andria Boer
 - vii. ELA: Leaving: Sarah Gonzales; New: Devan Hoxer, finalizing other candidates.

- viii. PE: Leaving; Taylon Abeyta; New: Currently interviewing
- c. Science: Due to the small number of requests, we will not be offering Biology next year.
- d. Teaching Assistants. Most positions are filled; we have a couple openings. We reduced the number of teaching assistants schoolwide through attrition.

4. Facilities Update

- a. Pavilion. Complete
- b. Sound System - Electrical has been updated; parts are on order.
- c. Bleachers - Complete.
- d. OPA partnered with Weber Morgan Health Department to secure the donation of 25 indoor air purifiers for classrooms and small spaces.
 - i. While our HVAC system purifies the air coming into the building from outside, these purifiers remove allergens, viruses, and other pollutants that build up throughout the day.
 - ii. We'll be checking out the purifiers to classrooms by teacher request for 2-week periods of time.
 - iii. We will be prioritizing rooms where there has been a confirmed Covid case or other absences due to illness (flu, strep, etc.)

5. Food Service

- a. Free lunch and breakfast continues through the end of the school year.
- b. Summer lunch requires in person offerings. Students must be present.
- c. Our PLE exemption was approved. SFAs with a positive or zero account balance in the non-profit school food service account as of December 31, 2021, will be exempt from the PLE requirement for the 2022-2023 school year.

6. Enrollment

- a. FY22 Current numbers and Enrollment Plan (as of 05/19/2022)
- b.

Grade	K	1	2	3	4	5	6	7	8	9	All
October 1	104	96	100	109	96	100	110	105	112	105	1037
May 17, 2022	100	95	98	106	94	99	102	107	112	99	1012
May 2021	92	93	101	98	92	104	95	107	100	111	993
Enrollment for FY23 (1 student pending acceptance)	103	104	98	109	110	101	105	114	110	114	1068
Goal enrollment	100	100	100	100	100	105	105	110	110	110	1040

Lottery Pull target	105	110	110	110	110	115	115	120	120	120	1135
---------------------	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	------

c. Annual Withdrawals

- i. 2017: 76
- ii. 2018: 70
- iii. 2019: 58
- iv. 2020: 77
- v. 2021: 94
- vi. 2022 to date: 76

d. FY22 Lottery as of 05/17/2022

OGDEN PREPARATORY ACADEMY						
Grade	I	A	GWL	SWL	TWL	FWL
K	33	104	24	9	0	0
1	3	41	3	0	0	0
2	0	44	0	0	0	0
3	4	31	2	2	0	0
4	0	31	0	0	0	0
5	3	26	2	1	0	0
6	6	22	4	2	0	0
7	0	54	0	0	0	0
8	0	35	0	0	0	0
9	0	20	0	0	0	0
Totals:	49	408	35	14	0	0

e. FY23 Lottery as of 05/17/2022

OGDEN PREPARATORY ACADEMY						
Grade	I	A	GWL	SWL	TWL	FWL
K	5	107	5	0	0	0
1	0	20	0	0	0	0
2	0	12	0	0	0	0
3	0	19	0	0	0	0
4	0	11	0	0	0	0
5	0	14	0	0	0	0
6	0	14	0	0	0	0
7	0	30	0	0	0	0
8	0	13	0	0	0	0
9	0	3	0	0	0	0
Totals:	5	243	5	0	0	0

7. FY22 Student Retention:

FY21 Grade	FY22 Grade	# Students Re-Enrolled FY21	FY20 Ending Enrollment	% Re-Enrolled
0	1	72	92	78.26%
1	2	85	93	91.40%
2	3	94	101	93.07%
3	4	82	98	83.67%
4	5	86	92	93.48%
5	6	97	104	93.27%
6	7	81	95	85.26%
7	8	94	108	87.04%
8	9	96	100	96.00%
		787	883	89.13%

FY21: 91.21%

FY20: 86.8%

FY19: 87.74%

Coversheet

Speech Therapy Agreement

Section: IV. Administrative Report
Item: B. Speech Therapy Agreement
Purpose: Vote
Submitted by:
Related Material: FY23_OPA_and_Something_to_Talk_About_Contract_(1).pdf

Contract for Speech Therapy Services for the 2022-2023 OPA School Year

Contracting parties:

Something To Talk About, LLC

somethingtotalkaboutspeech@gmail.com

Katie Poland M.S., CCC-SLP &

Heather Ferguson M.S., CCC-SLP

197 West 2050 South

Perry UT 84302

435-830-8647

Ogden Preparatory Academy (School)

1435 Lincoln Avenue

Ogden UT 84404

801-627-3066

This contract is for speech-language services during the 2022-2023 school year provided by Something To Talk About, LLC (SLPs) and provided to Ogden Preparatory Academy (School). Contracted time will be August 16, 2022 to May 26, 2023 according to the School's published calendar (176 days).

The total cost for all services shall be \$171,288 for the school year. This amount shall be paid in 12 equal monthly installments of \$14,274 payable the first of each month beginning July 1, 2022 and concluding June 1, 2023. This amount shall not be affected by changes in workload during the 2022-2023 school year.

1. Cost Calculation:

- a. \$567/day for work done by the Elementary Speech-Language Pathologist (SLP). A full day is considered 9 hours. The full-day rate will also include any paperwork that is done at home by the Speech-Language Pathologist (SLP). 177 full days.
- b. \$504/day for work done by the Junior High Speech-Language Pathologist (SLP). A full day is considered 8 hours. The full-day rate will also include any paperwork that is done at home by the Speech-Language Pathologist (SLP). 69 full days.
- c. \$306/full-day for work done by a Speech-Language Technician (SLT). A full-day for a SLT is considered 6 hours. 69 full days.
- d. \$204/half-day for work done by a Speech-Language Technician (SLT). A half-day for a SLT is considered 4 hours. 31 half days.
- e. \$504/day for work done by the Speech-Language Pathologist (SLP) Substitute. A full day is considered 8 hours. The full-day rate will also include any paperwork that is done at home by the Speech-Language Pathologist (SLP). 7 full days. This fee, \$3,528, is being waived.

FY23 OPA and Something to Talk About Contract

Page 1 of 3

- f. Kindergarten screeners will be charged based on a flat rate of 20 minutes per student at a rate of \$63/hour. Based on 2021-22 data, there were 90 kindergarten students screened. This would equate to a charge of \$1,890 for kindergarten screeners.
 - g. Hearing screeners for the 1st and 3rd graders will be charged based on a flat rate of 30 minutes per class at a rate of \$63/hour, plus 4 hours to come back and complete hearing rescreens. Based on 2021-22 data, that cost would be 8 hours for hearing screenings (4 hours for 8 classes, plus 4 hours of rescreens) at a cost of \$504.
2. Future Costs:
- a. Payments will remain the same for the entire 2022-2023 school year regardless of whether the caseload increases.
 - b. Any supervisory hours or expenses for the SLP(s) and SLT(s) will not be charged to the School.
3. Services to be provided:
- a. Provide consultative and direct speech/language services.
 - b. Consult with teachers, parents, and other professionals as needed.
 - c. Screen and/or evaluate each referred student in all areas of suspected language dysfunction as identified by the RTI/CAT team or the IEP team members for possible services. Evaluations and reports will be completed with timelines required by the School and IDEA.
 - d. Review progress of each student receiving speech/language services and document progress with the same frequency as general education students.
 - e. Revise IEP goals and objectives with IEP team members, as needed.
 - f. Make recommendations to parents and other professionals as appropriate.
 - g. Confer with classroom teachers concerning the classroom application of speech/language services recommendations.
 - h. Participate in the individual education planning process by collaborating with special education and general education teachers as appropriate for each student who is to receive speech/language services.
 - i. Maintain appropriate records and files for students receiving speech/language services.
 - j. Maintain current speech/language services evaluations for students receiving speech/language services to be in compliance with IDEA.
4. Student Data Privacy:
- a. All student records and information, whether created by Something to Talk About employees or others, shall be kept confidential. Sharing of student data shall comply with all State and Federal laws and State and School policies.

5. Termination:

- a. This contract may be terminated, with or without cause, by either party upon sixty (60) days written notice to the other party; provided that, if either party breaches any of the terms of this Contract, the non-breaching party may, in addition to any other remedy, terminate the Contract immediately. Upon termination or expiration of this Contract, all amounts due shall be paid within thirty (30) days. Upon termination, any amount unpaid in this agreement shall be prorated based on time worked. Upon termination for any reason, SLP shall return all student data or information to School. Any further disputes over termination shall be resolved under the laws of the State of Utah.

6. Records Administration:

- a. Contractor shall maintain or supervise the maintenance of all records necessary to properly account for Contractor's performance and the payments made by the State Entity to Contractor under this Contract. These records shall be retained by Contractor for at least six (6) years after final payment, or until all audits initiated within the six (6) years have been completed, whichever is later. Contractor agrees to allow, at no additional cost, the State of Utah, federal auditors, and State Entity staff, access to all such records.

Ogden Preparatory Academy Representative

Date

Something To Talk ABout, LLC representative

Date

Coversheet

Policy Updates

Section: V. Policies
Item: A. Policy Updates
Purpose: Vote
Submitted by:
Related Material: 3.09.POL_Audit_Policy_-_Google_Docs.pdf
2.04.POL Student Education Records Management.pdf
6.04.POL Electronic Resources Policy.pdf
6.15.POL Social Networking Policy.pdf



Official Policy of Ogden Preparatory Academy

3. Fiscal Management

3.09.POL Audit and Fraud Prevention Policy

Effective/Revision Date: 06/12/2019

Page 1 of 3

ANNUAL EXTERNAL AUDIT

The Governing Board and Administration of Ogden Preparatory Academy shall ensure that an annual, fiscal year, independent audit is completed. The audit shall be completed by the date required for submission to the USBE, State Auditor's Office and OPA Bond Holders.

Role of the Independent Auditor

The Board will arrange for an annual audit of the Organization's financial statements to be conducted by an independent accounting firm. The Board Finance Committee shall review and provide input to the Board in the selection of the independent accounting firm. The Board shall approve the selected independent accounting firm. The Administration shall finalize the agreement with the selected auditor according to Board approval. The independent auditor shall communicate with the OPA Board and Administration upon the completion of the audit. Audited financial statements, including the auditor's opinion, management letter, and required fund or schedules shall be submitted and presented to the Board of Directors by the independent accounting firm or a representative after the financial statements have been reviewed and approved by the Audit Committee.

The independent auditors may perform selected audit procedures prior to June 30th.

How Often to Review the Selection of the Auditor

The Board shall review the selection of the independent auditor in the following circumstances:

- Dissatisfaction with the service of the current firm.
- To ensure competitive pricing and high quality of service.
- At least every 3 years.

Selecting an Auditor

The Board shall consider the following factors in selecting an accounting firm:

- The Firm's reputation in the nonprofit community.
- The depth of the Firm's understanding of and experience with charter schools and federal and State reporting requirements.
- The Firm's demonstrated ability to provide the services requested in a timely manner.

- The ability of Firm personnel to communicate with the Board and staff in a professional, accurate and timely manner.
- Price.

Preparation for the Annual Audit

The Board and Administration shall be actively involved in planning for and assisting the independent accounting firm in order to ensure a smooth and timely audit. The Board President, members of the Board Finance Committee, and Administration are authorized to communicate with the independent auditor.

Administration shall provide schedules, documents and information requested by the auditors in a timely manner.

INTERNAL AUDITS

The OPA Administration will develop an internal audit checklist and conduct internal audits of finances, financial policies, and financial procedures.

FRAUD AND ABUSE PREVENTION

The School Administration will take steps and establish procedures in order to prevent fraud and abuse. These procedures include the following:

- The Business Manager will cross check credit card transactions made by the Business Director.
- A minimum of 2 people will approve Payroll from the Management Company prior to processing.
- Establish policies and procedures related to cash handling.
- Establish a hotline as an avenue for reporting concerns about potentially improper activities and post this hotline on the website in accordance with Utah State Legislature Utah Code Title 63I-5-201(4).

Additional policies and procedures will be established as needed.

3.09.POL Audit Policy	
Effective/Revision Date: 06/12/2019	Page 2 of 3

Document History

Approved: 12/17/2015

Revised: 06/12/2019 *Removed redundancy and reorganized.
Replaced Audit Committee with Finance Committee.*

Legal References

Utah Code 53A-3-404

Utah Code 63I-5-201(4)

3.09.POL Audit Policy	
Effective/Revision Date: 06/12/2019	Page 3 of 3



Official Policy of Ogden Preparatory Academy

2. Administration

2.04.POL Student Education Records Management

Effective/Revision Date: 06/17/2020

Page 1 of 3

Ogden Preparatory Academy personnel shall ensure that proper student records are created, obtained, and maintained in accordance with state, federal, USBE, and OPA policy. Records may be maintained digitally or physically. Student education records shall contain at a minimum the birth certificate, immunization records, transcripts, and attendance records. When a student withdraws from OPA the following shall occur:

- Applicable student records, including the request for records from the receiving school/LEA, shall be archived according to the OPA retention schedules.
 - If a request for records is not received, OPA personnel shall record information regarding student plans of transfer. Information shall include name and contact information of informant and expected destination.
- Copies of records shall be sent to the requesting school/LEA.
- The student information system shall be updated to reflect the appropriate withdrawal/transfer code and exit date.

Parents/guardians have the right to inspect and review all of their student's education records maintained by the School. If the education records of a student contain information on more than one student, the parent/guardian may inspect and review or be informed of only the specific information about their student.

- The School will grant a request by a parent/guardian for access to the education records of their child within a reasonable period of time, but in no case more than forty-five (45) days after the request has been made.

Parents/guardians may challenge and request the School to amend any portion of their student's education record that is inaccurate, misleading or in violation of the privacy rights of the student.

- The School shall consider the request and decide whether to amend the records within a reasonable amount of time. If the Principal decides not to amend the record as requested, the Principal shall inform the parent/guardian of the decision and of their right to a hearing.
- Upon request of a parent or guardian, the School shall provide an opportunity for a hearing to challenge the content of the Student's education records on the grounds that the information contained in the education records is inaccurate, misleading, or in violation of the privacy rights of the student.
- Such hearing shall be informal and shall be conducted by an individual who does not have a direct interest in the outcome of the hearing.

- If, as a result of the hearing, the School decides that the challenged information is inaccurate or misleading, the record should be amended accordingly and the parent/guardian informed in writing.
- If, as a result of the hearing, the School decides that the challenged information is not inaccurate or misleading, it shall inform the parent/guardian of their right to place a statement in any record, commenting on the challenged information in the record, or stating why they disagree with the decision. Any such document must remain with the contested part of the record for as long as the record is maintained, and shall be disclosed whenever the portion of the record to which the statement relates is disclosed.

The School may not disclose information related to education records without prior parental consent, except as provided by law. Such exceptions include, but are not limited to disclosures:

- To school officials who have a legitimate educational interest;
- To a person or company with whom the School has contracted to perform a special task;
- To other schools that have requested the records and in which the student seeks or intends to enroll, or where the student is already enrolled, so long as the disclosure is for purposes related to the student's enrollment or transfer;
- To individuals who have obtained court orders or subpoenas;
- To individuals who need to know in cases of health and safety emergencies;
- To officials in the juvenile justice system;
- In connection with audit and evaluation of federally or state supported education programs;
- To the Immigration and Naturalization Service (INS) for foreign students attending school under a visa; or
- To the Attorney General of the United States in response to an ex parte order in connection with the investigation or prosecution of terrorism crimes.

The School may disclose directory information for appropriate reasons if it has given parents annual notice of their right to request that their student's directory information not be released by the School.

- The following information relating to students may be declared directory information from time to time:
 - Name, address, e-mail address, and telephone number;
 - Date and place of birth;
 - Major field of study;
 - Participation in officially recognized activities and sports;
 - Weight and height of members of athletic teams;
 - Dates of attendance;
 - Degrees and awards received;
 - Most recent previous educational agency or institution attended; and
 - Photograph

2.04.POL Student Education Records Management

Effective/Revision Date: 06/17/2020

Page 2 of 3

- The School shall not release directory information to any individual or organization for commercial use.

The School shall give full rights to student education records to either parent or guardian, unless the School has been provided with evidence that there is a court order or other legally binding instrument relating to matters such as divorce, separation, or custody that specifically revokes these rights.

Confidentiality of Student Information

The School and all employees, volunteers, third party contractors, or other agents of the School shall protect the privacy of the student and the student's family through compliance with the protections established under state and federal law.

The School will provide appropriate training to employees regarding the confidentiality of student performance data and personally identifiable student information.

Document History

Approved: Unknown

Revised: 06/17/2020 *Included requirements for the creation, management and sharing of student records.*

Legal References

R277-419-9

2.04.POL Student Education Records Management	
Effective/Revision Date: 06/17/2020	Page 3 of 3



Official Policy of Ogden Preparatory Academy

6. Human Resources

6.04.POL Electronic Resources Policy

Effective/Revision Date: 02/12/2014

Page 1 of 2

PURPOSE

Ogden Preparatory Academy (the School) recognizes the value of computer and other electronic resources to facilitate student learning and help the School's employees accomplish the School's mission. The School has therefore made substantial investments to establish a network and provide various electronic resources for its students' and employees' use. Because of the potential harm to students and the School from misuse of these resources, the School requires the safe and responsible use of computers; computer networks, including e-mail and the Internet; and other electronic resources. This policy is intended to ensure such safe and responsible use and to comply with Utah Administrative Rule R277-495, the Children's Internet Protection Act, and other applicable laws.

ELECTRONIC DEVICES

The School recognizes that various forms of electronic devices are widely used by both students and employees and are important tools in today's society. The School seeks to ensure that the use of electronic devices, both privately-owned devices and devices owned by the School, does not cause harm or otherwise interfere with the learning, safety, or security of students or employees. The Principal shall therefore establish reasonable rules and procedures regarding the use of electronic devices at School and School-sponsored activities in compliance with applicable laws.

INTERNET SAFETY

It is the School's policy to:

1. Prevent user access over its computer network to, or transmission of, inappropriate material via the Internet, electronic mail or other forms of direct electronic communications;
2. Prevent unauthorized access and other unlawful online activity;
3. Prevent unauthorized online disclosure, use or dissemination of personal identification information of minors; and
4. Comply with the Children's Internet Protection Act (section 254(h) of title 47, United States Code).

The Principal shall establish procedures to accomplish these objectives and ensure compliance with applicable laws.

STUDENT ACCEPTABLE USE OF SCHOOL ELECTRONIC RESOURCES

The School makes various electronic resources available to students. These resources include computers and other electronic device and related software and hardware as well as the School's network and access to the Internet. The School's goal in providing such electronic resources to students is to enhance the educational experience and promote the accomplishment of the School's mission.

Electronic resources can provide access to a multitude of information and allow communication with people all over the world. Along with this access comes the availability of materials that may be considered inappropriate, unacceptable, of no educational value, or even illegal.

The Principal shall ensure that rules and procedures regarding students' use of the School's electronic resources are established and clearly communicated to students and their parents/guardians. The Principal will ensure that safeguards are in place to restrict access to inappropriate materials and that the use of the Internet and other electronic resources is monitored. The Principal shall ensure that students receive appropriate training regarding these rules and procedures.

STAFF ACCEPTABLE USE OF SCHOOL ELECTRONIC RESOURCES

Improper use of the School's electronic resources by employees has the potential to negatively impact students, damage the School's image, and impair the School's electronic resources. Therefore, this policy is intended to govern employees' and volunteers' use of the School's electronic resources, and employees must agree to these terms as a condition of employment. The Principal shall establish rules and procedures regarding employees' use of the School's electronic resources.

This policy will be reviewed periodically to ensure that it continues to meet the School's needs.

Document History

Approved: 02/12/2014

Legal References

6.04.POL Electronic Resources Policy	
Effective/Revision Date: 02/12/2014	Page 2 of 2



Official Policy of Ogden Preparatory Academy

6. Human Resources

6.15.POL Social Networking Policy

Effective/Revision Date: 02/09/2011

Page 1 of 2

PURPOSE

The Ogden Preparatory Academy (the School) recognizes both the educational value and dangers of social networking sites. To protect School personnel, students, parents, and School resources, the School requires all educators who access social networking sites to abide by the provisions of this policy.

DEFINITIONS

Web page: a social networking site, personal website, blog or other Internet location that can be edited by an individual with the correct username and password.

INSTRUCTIONAL USE

Web pages may only be accessed at School or using School resources for instructional purposes directly related to the educator's curriculum.

Prior to creating or using a web page for instructional purposes, an educator must obtain written consent from the School Principal. The consent must include the purpose of the access, the names of students permitted to access the site, and the anticipated duration of the instructional activity. The Principal may withdraw consent at any time.

An instructional use web page shall comply with all School policies, including the student Code of Conduct. Profane, obscene, defamatory or otherwise inappropriate comments are not permitted.

Educator web page postings may not violate any state or federal laws. Accordingly, educators must comply with the federal Family Educational Rights and Privacy Act and may not post student photos or personally identifiable information without prior written parental consent.

Educators are responsible for ensuring that student posts that violate laws or School policies are removed immediately and that students are referred to the Principal for appropriate disciplinary action. Educators are responsible for all content on the educator's web page, including posts by students.

Access to instructional web pages must be limited to those students whose parent or legal guardian has given written permission for the student to participate on and use the web page. School administrators must be granted access to the web page and shall monitor the site for compliance with this policy.

Educators must include a disclaimer on their web page noting that the content, views, or opinions expressed on the web page do not represent the School and that the educator is solely responsible for any opinions, views, or content on the web page.

PERSONAL USE

School employees who maintain a personal web page shall not allow students to access their personal web page.

School employees shall not solicit students as friends on their personal web pages or invite or encourage students to read or access their web pages.

School employees may not access personal web pages using school resources or during work time.

School employees may face disciplinary action for posts on their personal web pages that violate School policies or state rules regarding professional conduct and create a disruption in the school or interfere with the employee's ability to serve effectively at the School.

School employees may not use School logos, mascots, symbols or trademarks on their personal web pages.

School employees who use school resources to create, maintain, or post to personal web pages or the pages of others have no expectation of privacy, and their activities may be subject to review by administrators.

School employees who violate this policy will be subject to discipline.

Document History

Approved: 08/18/2010

Revised: 02/09/2011

Legal References

6.15.POL Social Networking Policy	
Effective/Revision Date: 02/09/2011	Page 2 of 2