



**CHARTER SCHOOL APPLICATION  
2012-2013**



**Pacific Heritage Academy**  
A 21<sup>st</sup> Century Charter School

TABLE OF CONTENTS

1.	Cover Sheet .....	1
2.	Title Page .....	4
3.	Target Population .....	7
4.	Calendar and Bell Schedule .....	20
5.	Market Analysis .....	28
6.	Capital Facility Plan .....	36
7.	Detailed Business Plan .....	51
8.	Budget .....	65
9.	Fiscal Procedures .....	78
10.	Organizational Structure and Governing Body .....	84
11.	Background Information Sheet .....	102
12.	Comprehensive Program of Instruction .....	127
13.	Elementary Assessments .....	134
14.	Special Education .....	140
16.	Admission and Dismissal Procedures, including Suspension/Expulsion .....	143
17.	Procedures to Review Complaints .....	152
18.	Opportunities for Parental Involvement .....	157
19.	Educator Qualifications .....	170
20.	Administrative Services .....	172
21.	Library Plan .....	186
22.	Technology Plan .....	192
23.	Extra-curricular Activities .....	202
24.	Terms and Conditions of Employment .....	207
25.	Employee Evaluation .....	209
26.	Employment of Relatives .....	212
27.	Insurance .....	213
28.	For Conversion Charter Schools .....	215
29.	Assurances .....	216
30.	Utah State Retirement .....	221
31.	Additional Information/Letters of Support .....	222



Pacific Heritage Academy  
Charter School Application  
2012-2013

Submitted to Dr. Dorothy Cosgrove at the Salt Lake City School District on 3-31-2010 .  
9-27-2010 (revised)

(NOTE: repeat this statement for each district in which the school may be located.)

I certify all information contained in this application is complete and accurate, realizing that any misrepresentation could result in disqualification from the charter application process or revocation after award. I understand that incomplete applications will not be considered.

The charter school applicant acknowledges that it has read all Utah statutes regarding charter schools and that, if approved, it is subject to and will ensure compliance with all relevant federal, state and local laws and requirements. The charter school applicant acknowledges that, if approved to operate a charter school, it must execute a charter contract with the Utah State Charter School Board within twelve months of the date of approval of the charter by the Utah State Charter School Board and must begin providing educational services within the timeframe outlined in the charter. Failure to do so may result in revocation of the charter approval and, if applicable, termination of the contract and revocation of the charter.

Ofa K. Moeai  
Authorized Agent (please print)

  
Signature of Authorized Agent

3-31-2010  
Date

**All information presented in this application becomes part of the charter contract and may be used for accountability purposes throughout the term of the charter contract**



## SECTION 2

# TITLE PAGE

Name of Proposed Charter School: Pacific Heritage Academy  
(herein called PHA)

New School

Converted School

Name of Applicant Applying: Pacific Heritage Schools, Inc.  
(herein called PHSI)

Authorized Agent: Ofa K. Moeai  
Mailing Address: 1050 W. Goosenest Dr. Elk Ridge, UT 84651  
Daytime Phone: (801) 787-4021  
Email: ofakm@yahoo.com

District(s) school will be located: Salt Lake City School District

### Form of Organization

Non-Profit  
Corporation

Tribal Entity

\_\_\_\_\_



## Board of Directors

The governing body of a charter school is responsible for the policy decisions of the school. Please indicate the makeup of this body below.

Name	Phone Number	Type of Member	Position on Board
Ofa K. Moea'i	801-787-4021	Parent	Chair
Richard Kaufusi	801-755-2332	Parent	Vice Chair, Community Liaison
Cecilia Whitman	801-465-2041	Parent, Finance	Treasurer
Nephi Aiono	801-599-2344	Facility Financing	Member

## Founding Members

Please attach a list of those persons whom you have designated as FOUNDING MEMBERS of the school. Children of a Founding Member (an individual who has had a significant role in the development of a charter school application) are eligible for preferential enrollment under both State and Federal Charter School law. 53A-1a-506(b)(i)(A) Also, identify the percentage of students eligible for preferential enrollment of any type.

Ofa and Mark Moea'i  
Cecilia and Scott Whitman  
Isaac Ha'o  
Valerie Varner  
Lose and David Tuinei  
Malia and Dave Thurman  
Richard and Ofa Kaufusi  
Lyle & Linda Kinikini  
Michael & Norma Ballard



*Children of a Founding Member are eligible for preferential enrollment under both State and Federal Charter School law [53A-1a-506\(b\)\(i\)\(A\)](#). The number of students granted preferential enrollment at Pacific Heritage Academy may not exceed 5% of the maximum student enrollment.*

## SECTION 3

# TARGET POPULATION

### Mission Statement (use only this space):

*At Pacific Heritage Academy we use  
the power of education,  
the endurance of language and culture  
and the virtue of relationships and community  
to help young people on voyages of discovery.  
Through thoughtful inquiry, challenging curricula, rigorous requirements  
and compassionate service  
students learn who they are and what they can become.  
We create learning experiences  
and students find their Roots...  
and their Wings.*



	GRADES AND SPECIFIC NUMBER OF STUDENTS SERVED BY GRADE													TOTAL (Enrollment cap)
Year 1	K	1	2	3	4	5	6	7	8	9	10	11	12	
2012	50	50	50	50	50	50	50	50	50					450
Year 2	K	1	2	3	4	5	6	7	8	9	10	11	12	
2013	50	50	50	50	50	50	50	50	50					450
Year 3	K	1	2	3	4	5	6	7	8	9	10	11	12	
2014	50	50	50	50	50	50	50	50	50					450
Ultimate Enrollment	50	50	50	50	50	50	50	50	50					450
<p>(The number of students should be at maximum the enrollment that is being requested. Insert as many rows as needed to accurately reflect the school's growth model.)</p>														

School Calendar	
<input type="checkbox"/> Standard <input type="checkbox"/> Extended School Year	Instructional Days <u>  182  </u>
<input checked="" type="checkbox"/> Alternative <u>Balanced</u> <u>Calendar</u>	Start Date <u>  Aug. 21, 2012  </u>
(aka Modified, Year-round, Non-Traditional—please see Section 4: Calendar & Schedule)	





## *Seven Purposes for Charter Schools*

Of the established 'Seven Purposes for Charter Schools', Pacific Heritage Academy will uniquely address the following five purposes as outlined below and described throughout this application:

### **1. Continue to improve student learning:**

The Utah State Office of Education has identified problems with lower educational achievement and graduation rates among ethnic minority students in Utah, including Pacific Islander students. (*USOE - Data, Assessment & Accountability, 2009 Graduation Rate and Dropout Rate Report*) Pacific Heritage Academy will continue to improve student learning by using a host of best-practice teaching methods within an effective research-based school reform model. Additionally, Pacific Heritage Academy has a mission to use Pacific Islander and world cultures as a continual topic of interest and intellectual pursuit within our curriculum, and to teach Heritage Languages of the Pacific. (Heritage Languages are the traditional languages spoken in the homes or communities of our target students.)

Our program consists of strategies and practices used on a daily basis through personal interactions, instructional practices and the learning of core content which acknowledge, consider, and include the values, norms, knowledge, beliefs, practices, experiences, and languages that are the foundation of the cultures of the students we are serving. With this foundation we are uniquely positioned to improve learning for all students and for our target population of Pacific Islanders.

### **2. Encourage the use of different and innovative teaching methods:**

We have identified Expeditionary Learning (commonly referred to in this document as 'EL') as a model that is not currently used in the Salt Lake City School District. Additionally, our use of the social studies and Pacific Islander cultures as a consistent framework around which to teach the Utah Core Curriculum is also unique. While EL is implemented currently in only two Utah charter schools, only one other charter school, Uinta River High School, attempts to address and teach the culture of it's of students. The various teaching methods used in the EL model have great appeal to students generally, but we find they also lend well and support our mission to bridge western education and the less-recognized learning modes and objectives found in non-western cultures including Pacific Islander cultures.

These two guiding methodologies are evidenced, for example, as we consider student preferences for visual and perceptual rather than verbal teaching; “watch and do” instead of “trial and error”; experiential learning based in natural settings; and social or collaborative learning. Project-based learning, a core practice of the EL model, and culture-based education go hand in hand as ideal partners which encourage and incorporate the use of many innovative teaching methods that are often described as “21st century” learning and living skills as well as 21<sup>st</sup> century topics and themes.

#### **4. Increase choice of learning opportunities for students:**

While learning opportunities abound in Salt Lake City through a variety of public school district, community, and private efforts, Pacific Heritage Academy offers a very unique program not currently found in the Salt Lake Valley or anywhere in the state of Utah. The educational offering at PHA is a multilayered package that combines:

- hands-on, project-based teaching methods and rigorous learning strategies to build 21<sup>st</sup> century skills and knowledge that prepare global citizens for life-long learning and service
- culture-based learning through an emphasis on the social studies and connections to real-world issues, places, and people
- a rich and immersive multi-cultural environment where the bridge of peace and understanding is built by knowing and honoring heritages (Roots) and preparing for and courageously facing the future (Wings)
- a Heritage Language Program which celebrates and preserves the rich languages of the South Pacific

Families seeking any one of these features will find that the program at PHA increases choice of learning opportunities for students.

#### **6. Provide greater opportunities for parental involvement in management decisions at the school level.**

Currently, the parents of many students in our target population feel uncomfortable to become involved in the details of their children’s learning efforts, with teachers, or even with the classroom setting, let alone the intimidating world of administrators and boards with decision-making power. Pacific Heritage Academy breaks down those cultural, language, and sometimes imaginary barriers to empower parents to become involved as the first and best educators and advocates of their children.



Parents at PHA are invited, encouraged and expected to become highly involved in the success of their student(s) and of the school. We employ a research-based model from the *National Network of Partnership Schools* (NNPS) that helps us set goals and assess our efforts in the way we partner with parents and families. Our goals for involving parents include organizing and leading the Parent & Family Organization (PFO), nominating representatives to Board of Trustee positions, and lending their expertise and skills to preserve their language, culture and heritage as we explicitly teach it to their children. In this and many other ways parents are crucial to helping our school live its mission as they become our partner and lend their unique talents and abilities.

**7. Expand public school choice in areas where schools have been identified for improvement, corrective action or restructuring under the No Child Left Behind Act.**

Pacific Heritage Academy will expand choices and help alleviate the challenges of educating a very diverse neighborhood of students. It is our greatest desire to fill a niche that currently troubles the public system in Salt Lake City. According to Federal AYP reports, none of the three neighborhood elementary schools which serve the Glendale area made Annual Yearly Progress (AYP) as defined by NCLB last year (2009-10).

Struggling under the NCLB, schools in the Salt Lake City School District are striving to educate the greatest percentage (55%) of ethnic students in the entire state of Utah. These same three Glendale area elementary schools serve between 89% and 92% of students who qualify for free and reduced price lunch. Our innovative program of instruction will appeal as a public school choice to many families in the Salt Lake City area and assist the SLCS D by targeting Pacific Islander students and many other ethnic neighbors in the district.



## Target Population Narrative

Many schools are founded on an idea to use a specific educational model or curriculum. Others focus on an academic subject or specialty area. Still others are created to meet the needs of a large geographical area. Our founding group began with a target population in mind; a specific sub-group of the general population of school-age children. Without question, students with Pacific Islander ancestry were the inspiration and reason for, indeed the genesis of, this school. Our mission statement reflects our desires to create an outstanding educational option for this target population:

*At Pacific Heritage Academy we use  
the power of education,  
the endurance of language and culture  
and the virtue of relationships and community  
to help young people on voyages of discovery.  
Through thoughtful inquiry, challenging curricula, rigorous requirements  
and compassionate service  
students learn who they are and what they can become.  
We create learning experiences  
and students find their Roots...  
and their Wings.*

The following narrative provides a clear definition of our target population and details our reasons for choosing to serve this group.

### **Defining our Target Population: “Students with Pacific Islander Heritage”**

Our educational program targets students with Pacific Islander heritage. These students are defined as those whose parents, grandparents, and even great grandparents have come to the United States from islands in the Pacific, generally the South Pacific Ocean, but to include the islands of Polynesia, Melanesia, and Micronesia. These students range in age from 5 to about 13 years of age and are typically in Kindergarten through 8th grades. Pacific Heritage Academy seeks to serve such students and their families who particularly reside in the Salt Lake City neighborhood known as Glendale, with Poplar Grove and Rose Park in the general northwest area from downtown Salt Lake City and West Valley City to the southwest. We have set a goal to reach out to this subpopulation and enroll at least 50% of our students from this group. We anticipate the remaining students will be a wonderful multicultural mix of

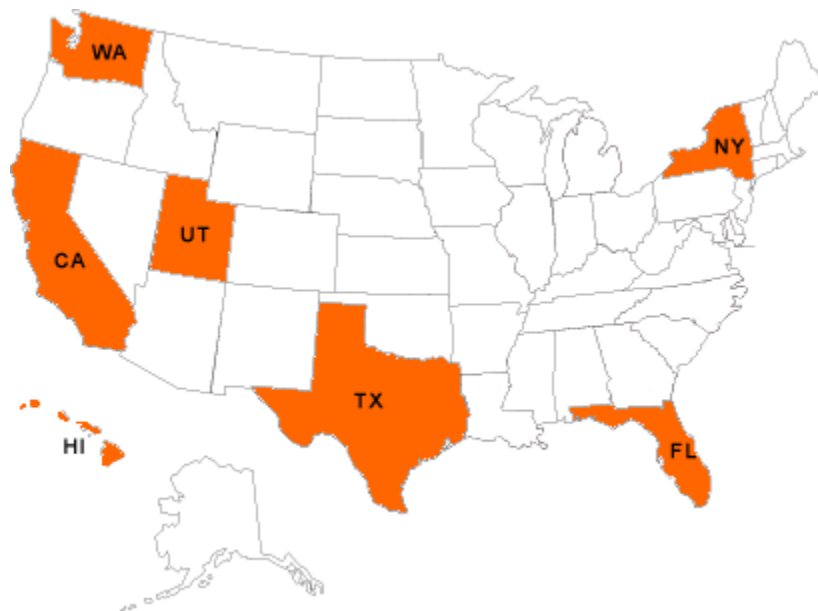
children from eastside neighborhoods, West Valley areas to the south, and from all over the Salt Lake valley.

We believe families will also come to our school who are specifically seeking a teaching approach that pays attention to 21<sup>st</sup> century skills and knowledge, uses active pedagogy and other best-practice teaching methods, is project-based, hands-on, and has an integrated approach to teaching the Utah core curriculum. We also expect a portion of our enrollment to be those who appreciate and value the dedicated focus to cultural and global studies, a popular issue among Utah families seeking exposure to the world for their children.

### Overview of Population Statistics for Pacific Islanders

*National Statistics:* In U.S. Census data the racial group “Native Hawaiian and Other Pacific Islander” refers to people having origins in any of the original peoples of Hawaii, Guam, Samoa or other Pacific Islands. According to the 2008 U.S. Census Bureau estimate, there are roughly 1,112,000 Native Hawaiians/Pacific Islanders who reside within the United States. This group represents about 0.1 percent of the U.S. population. Out of that number, 280,538 Native Hawaiians or Pacific Islanders reside in Hawaii. Some other states that have a significant Native Hawaiian/Pacific islander population are: California, Washington, Texas, New York, Florida, and Utah as shown in the map below. It is also significant to note that 30 percent of this group is under the age 18, indicating a group of people with a young generation rising. (*US Department of Health and Human Services, The Office of Minority Health, <http://minorityhealth.hhs.gov>*)

High Concentrations of Pacific Islanders in the U.S.





*Utah's Pacific Islanders:* Recent census data report Pacific Islanders and Native Hawaiians make up nearly 1% of Utah's population and nearly 3% of Salt Lake City's population. As of this writing, approximately 21,500 people in the Salt Lake Area were of Native Hawaiian or Pacific Islander ancestry, an increase since 2000 of nearly 4% of the city's population and growing. (*U.S Census Bureau, People Quick Facts*) Two Utah cities, West Valley City and Salt Lake City, rank nationally among cities with populations of 100,000 or more, with the highest percentages of Native Hawaiian and other Pacific Islanders. West Valley City is number two on the list--second only to Honolulu, Hawaii; and Salt Lake City has the fourth largest percentage of Pacific Islanders in the entire nation. (*Utah Office of Ethnic Affairs, U.S. Census 2000*).

*Educational Attainment:* The U.S. Censes reports the following data about education relative to our target population. A strong 84 percent of Native Hawaiians/Pacific Islanders have high school diplomas. 10 percent of Native Hawaiians/Pacific Islanders have a bachelor's degree in comparison to 27 percent of Caucasians. 4 percent of Native Hawaiians/Pacific Islanders have obtained graduate degrees in comparison to 11 percent of Caucasian Americans. 42 percent of Native Hawaiians/Pacific Islanders speak a language other than English at home. (*U.S Census Bureau, People Quick Facts*)

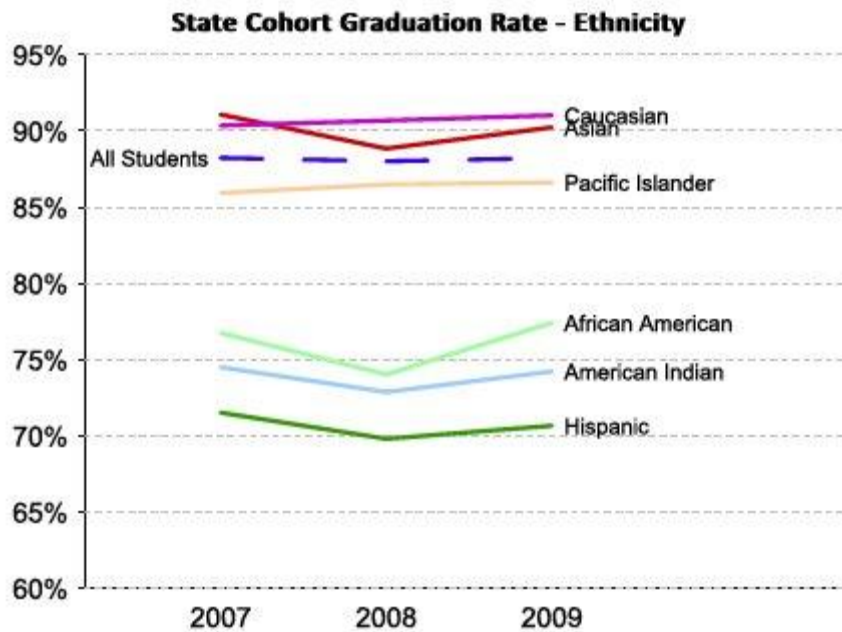
*School Age Children:* As mentioned previously, Pacific Islanders in Utah are comprised of several distinct cultures and nationalities including families from Tonga, Hawaii, New Zealand, Tahiti, Palau, Samoa, Fiji, Guam, the Northern Mariana Islands, and Micronesia. Children and grandchildren of immigrants from Tonga and Samoa make up the largest numbers of Pacific Islander students in Utah public schools. These students are accounted for in USOE data and number nearly 4,000 in just the two closest districts to the Glendale area, namely Salt Lake City School District and the Granite School District. (*USOE 2009 <http://www.schools.utah.gov>*) The three elementary schools in the Glendale neighborhood report enrollment of between 4% and 11% Pacific Islander students, with the Jr High reporting 12% Pacific Islander students. (*Salt Lake City District web site [www.slc.k12.ut.us/schools](http://www.slc.k12.ut.us/schools) 2010-2011 School Improvement Plans*)

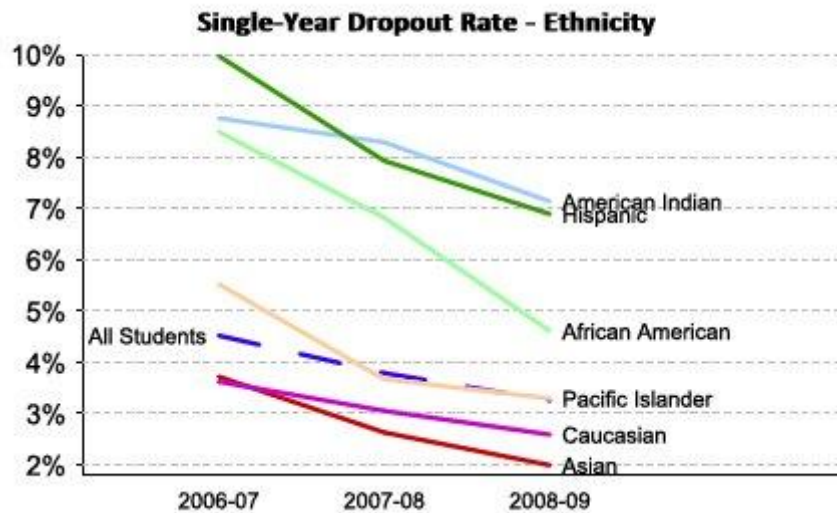
## **Reasons for Targeting Pacific Islanders**

1. *Pacific Islander students are doing many things well and are a good investment. We will build on family and student strengths and continue to improve student learning.*

The Utah State Office of Education has identified problems with lower educational achievement and graduation rates among ethnic minority students in Utah, including

Pacific Islander students. (USOE - Data, Assessment & Accountability, 2009 Graduation Rate and Dropout Rate Report) These statistics show however, that Pacific Islanders are leaders among ethnic students in attendance, graduating and keeping school dropout at bay. As shown in the following graphs these students have strengths in many education-related areas. This makes us feel confident that we can build on these positive trends and continue to improve learning. The tables below from USOE data illustrate the relative strength of Pacific Islander students to other groups in the areas of graduation and drop out rates. This group is not far below “all students” and doing much better than most other ethnic groups in graduating. Similarly, in the area of dropping out of school, Pacific Islanders have markedly lower rates than other ethnic groups and have most recently improved to meet the average rate of ‘all students’ who are leaving school early.





*(USOE - Data, Assessment & Accountability, 2009 Graduation Rate and Dropout Rate Report)*

In spite of commonly attributed stressors such as economic disadvantages, second or dual language acquisition, as well as family issues and community cultural factors inhibiting progress and educational success, these positive trends are encouraging and give us reason to believe that Pacific Islander students are a good investment and may likely respond to educational approaches and models designed with them in mind.

#### *History of Education for Pacific Islanders in Significant*

PHA founders believe there is an important historical significance to the relatively high attendance and graduation rates of our Pacific Islander students, now second and some third-generation immigrants. We attribute these values to a strong family and community support and value for educational achievement as taught through decades of missionary schools in the islands and the positive regard for formal education in post-colonial island culture. The very earliest formal schools in the islands were set up by Christian missionaries in 1882 to teach children to write, spell and read English. These schools grew and continued through the turn of the century establishing British values and perspectives as part of island cultures in the areas of economics, politics, and certainly has permeated island education ever since. Today, both government and mission schools provide primary, middle, and high school grades in the Pacific for uniformed children who spend their days in schools which have not changed very much from the missionary style of schooling introduced over 100 years ago. The practicing of drills and rote memorization with a motivation to do well on exams and to be allowed to migrate to pursue further studies is the focus. Interestingly, this approach to education has produced high rates of literacy in the islands, such as Tonga's 98.5%, Samoa's 97%, and Fiji's 93% literacy. ([www.contryreports.org](http://www.contryreports.org), [www.globaleducation.edna.edu](http://www.globaleducation.edna.edu))



Parents in the islands, however, are distanced from the educational process and teachers and administrators are considered the authority on how and what is taught. Parents support children by taking care of other family worries but are not considered educators or authorities on education or the development of their children. Children, who are to be seen and not heard, have as their duty to 'go to school' and 'get good grades'. The mysterious process of learning takes place in the school house during school hours and is a one-size-fits-all education, standardized for the masses, and for the purpose of producing family members who might contribute to a higher standard of living and an elevated social status. Most parents of our target population who may have been schooled in the Pacific carry with them the feeling that to be educated is good and worthwhile. Even today, young parents of our students, who were born or grew up in America and were educated in public schools, likely carry these same perspectives and experienced these dynamics as their own parents stood back and watched them 'get an education'. Education provides advancement and status in the community and for countries like Tonga where a monarchy and/or the intricacies of culture governs island life and the people are subject to their place in a stratified society; educational achievement provides an otherwise impossible social and economic mobility. Indeed, the pursuit of education and economic progress is most often the reason known and cited for original migration from the islands to the US and other developed countries.

Whatever the original motives, this value or dream of furthering education still means upward mobility and success and is transferred to children in the States after immigration. We can build on this positive trend and at the same time, work to ensure that learning for the new generation is enjoyable, meaningful, and life-changing as it is individual-changing. Although many island immigrants admit to being 'detoured' or 'distracted' from the original goals of higher and better education, formal schooling is still highly valued and socially rewarded as evidenced in family traditions of 'luau' celebrations and flower and candy 'leis' for graduations. In most Pacific Islander homes, high school graduation is a family expectation not seen as impossible and according to USOE statistics, one that is reached by most Pacific Islander students in our target area. Graduation rates for 2009 in the SLCS D high schools demonstrate this fact with East High and Highland High both graduating 100% of their Pacific Islander seniors. West High (the designated High School for Glendale area students) followed not far behind with 89% of Pacific Islander seniors graduating. Although encouraging, this contrast also reminds us of the increased needs of the Westside area as compared to other areas even within the local district and within the geographic city. (*USOE - Data, Assessment & Accountability, 2009 Graduation Rate and Dropout Rate Report*)



Pacific Heritage Academy therefore, will seek to improve student learning for our target population by using a host of best-practice teaching methods and approaches. As previously mentioned, our research produced an effective research-based school reform model called *Expeditionary Learning (EL)* which may help us do this. Additionally, Pacific Heritage Academy is uniquely guided by a dedication to teaching from a social studies or cultural studies perspective. With this program offering we are uniquely positioned to improve learning for all students and for our target population of Pacific Islanders. We feel all students, as well as our Pacific Islander students, will benefit a great deal from the connection they will get with a integrated approach to the core curriculum. Using cultural themes and social studies topics as well as building a learning environment that weaves in and considers culture and values of traditional heritages will be beneficial to students who are in transition and at-risk of losing beneficial components of their cultural heritage.

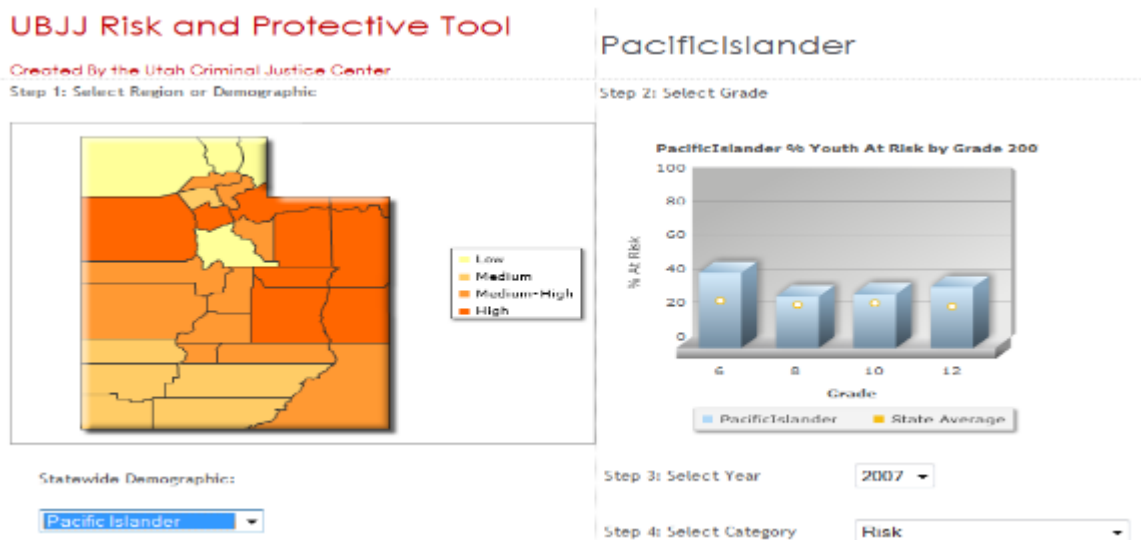
*2. Pacific Islander parents and families need support, mentoring, and modeling. We will reach out to educate, empower, and support them in returning to their rightful place as the first and best teachers and mentors of their children. We will offer greater opportunities for parental involvement in education at all levels.*

Not surprisingly, parents and grandparents of many students in our target population feel uncomfortable or don't feel they have time to become involved in the details of their children's education. Many times cultural differences and unfamiliarity with the education and other social systems may cause feelings of insecurity and intimidation for families. Economic hardships, not uncommon to immigrant families for many generations, also burden many families further preventing involvement and learning about the educational system and what supportive parents and families can do to help their students succeed. Recent research shows that, as adult unemployment rises, this tends to be associated with increases in drug use, risky and illegal behavior by teens in families affected economically by the challenges of falling income. Many of our target families are under stress and the impact on their children is great. (*Source: Utah Board of Juvenile Justice*)

This significant study by the Utah Board of Juvenile Justice confirmed many of our assumptions and shows that Pacific Islander youth in Salt Lake County (as opposed to Pacific Islander youth in Utah County) are at higher risk for social problems such as substance use, antisocial behavior and gang involvement and incarceration than are youth to the south, in Utah County. (*See illustration below, left*) Interestingly, Utah County Pacific Islanders stand out as low risk for these same social problems. We attribute this to the high density, urban setting of the Salt Lake valley and it's challenged school systems handling many issues and a growing population of

minorities. Our decision to locate the school in the Salt Lake metro resulted from this realization and confirmation.

Eye-opening to us was the data that showed Pacific Islanders to have the greatest percentage of their youth at-risk in the 6th grade when compared with risk in grades 6-12. (See illustration below, right) We feel a strong sense of mission to provide a protection to these young people through and beyond the 6<sup>th</sup> grade. Our school design was purposeful to include grades K-8 so as to keep and influence students for as long as possible and hold them particularly close in the middle grades. Our plans include a research-based model to consistently work at involving parents in the educational process including teaching of parenting and family skills that help children identify with and feel close to parents. We will teach and promote home management and relationship building skills to strengthen families as a protective factor for children. (See Section 18: Parental Involvement)

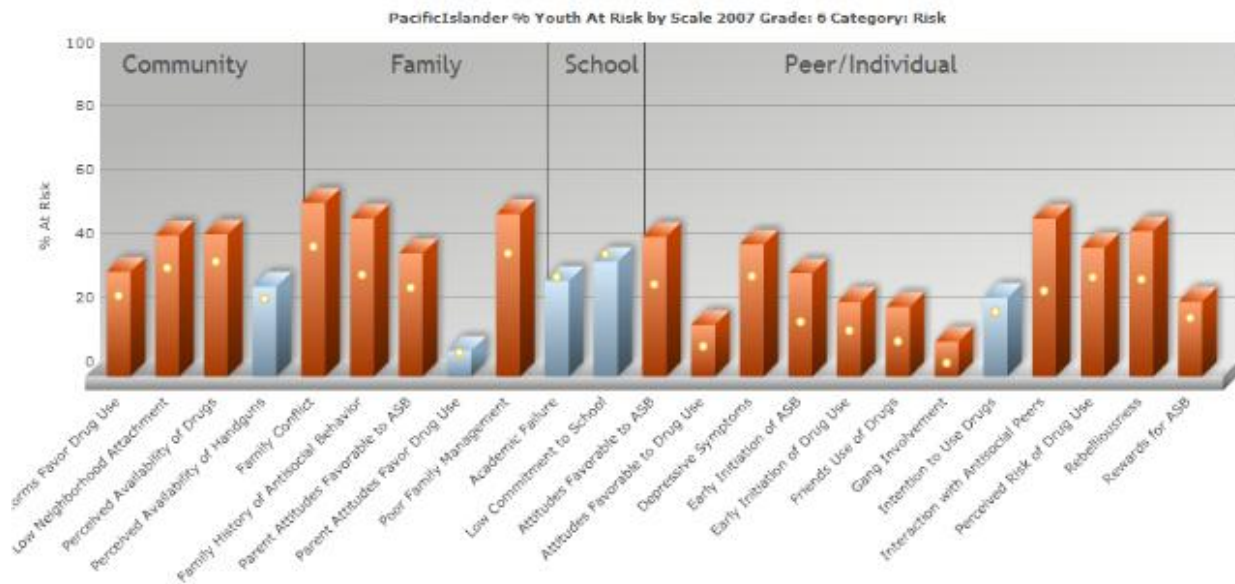


(Source: Utah Board of Juvenile Justice)

Of great value in the Juvenile Justice research study was the finding that the factors of greatest impact on these vulnerable 6th grade Pacific Islander youth were overwhelmingly in the area of “Family” and “Community”. As demonstrated on the chart below, the factors most troubling to Pacific Islander youth were:

- Family Conflict
- Poor Family Management
- Interaction with Antisocial Peers
- Family History of Antisocial Behavior

- Rebelliousness
- Perceived Availability of Drugs
- Low Neighborhood Attachment
- Perceived Risk of Drug Use
- Depressive Symptoms
- Attitudes Favorable to ASB
- Parent Attitudes Favorable to ASB



In this same graph, it is important to note that Pacific Islander youth were found to be at low-risk in the two areas under education, both "Academic Failure" and "Low Commitment to School". Pacific Islander families are, in general, not negligent of the duty to educate their children. Children show up and attempt the educational program offered to them. This is consistent with what we know about the history and influence of education on Pacific Islanders in their homelands beginning with formal education initiated by Christian missionaries to the islands with a heavy influence heavily by the British system and philosophies of education from the turn of the century. These findings increase our commitment to maintain and build on these traditions but to add a new 21<sup>st</sup> century twist with the use of new learning methods and involving parents in new and meaningful ways.

3. *Pacific Islanders can benefit from educational options. We will increase choice of learning opportunities for these students:*

While learning opportunities abound in Salt Lake City through a variety of district, community-based, and private efforts Pacific Heritage Academy offers a very unique



emphasis with a culture-based or social studies learning focus, a Heritage Language Program, and a curriculum which features active hands-on learning, integrative studies, active pedagogy and much more through a research-based teaching model. PHA offers all students a new and very unique choice with an immersive multi-cultural, linguistically-rich, and academically-rigorous learning experience not currently found in the Salt Lake Valley or anywhere in the state of Utah. For students in the west Salt Lake City area or those with Pacific Islander ancestry, PHA will be a welcoming and comfortable opportunity for parents to feel ownership and become more involved, and for students to rise and shine knowing there are support systems sensitive to their unique needs and that challenging programs have been customized with them in mind.

### **Conclusions: Three Points about Pacific Islanders**

1. Pacific Islanders come from a tradition of strong academic skills as instituted and supported by governments and church sponsored schools in the islands over the last century. Formal education is a culturally accepted priority and an expected achievement on levels possible in the islands. Formal educational structures, particularly British methods and systems, long ago replaced family and community participation. Pacific Islander immigrants have been participating in American education for the last half-dozen decades but have not learned to fully navigate the inner workings nor the wide range of educational systems available to them in the United States. Pacific Islander immigrants need opportunities to return to participating in the education of their children. They will also benefit from having understanding guides and mentors to explain and demonstrate the intricacies of educational systems and processes.
2. Traditional, indigenous ways of learning from and within families and village communities in the islands are valuable and should be revived and built upon. Long forgotten, these definitions of authentic learning and education are more closely aligned with 21st century skills and life-long learning profiles than western structures of education set up in the islands by missionary groups of the early 20th century and are still found in most American schools today. Students will gain a sense of pride and identity when the culture of their forbearers is uncovered, valued, found useful, and celebrated for its authenticity.
3. Pacific Islander cultures have experienced the predictable casualty of colonization in the islands and further disintegration through immigration and attempts at social assimilation in new countries. The misplacement of family and community involvement in the educational process is a real damage that calls for healing. This

disintegration of traditional social structures has prevented families and villages from taking their traditional place in the education of their children. Youth have therefore experienced isolation and alienation from their parents and the villages that would otherwise be educating them. Returning families and communities to their traditional place as the first and best teachers of their children will heal and forward the education of their children in the 21<sup>st</sup> century.

### **Strategy for Meeting the Needs of our Target Community**

1. *To support and build on strengths of this population.* Statistics show that Pacific Islander students are good at getting to school, and they manage to graduate at rates higher than other minority groups. Most Pacific Islander families are very supportive of education and historically have had access to and achieved in academic ways and in educational settings. It is a common expectation in families that children try hard to get good grades and to graduate.

2. *To reduce and prevent challenges of this population.* Pacific Islander students are vulnerable to modern urban challenges and need to avoid substance use, have alternatives to gang involvement, and become informed about the impact of decisions on health. Identity issues in youth stem from growing up in isolated and ethnically homogeneous communities with the limiting influences of the media and the problems of other ethnic minority neighbors after which they are left to pattern their behavior and set their goals. When parents and the community fail to consistently set, model, and mentor children and youth toward clear expectations for values, behavior, and objectives in character, social, and educational development youth quickly flounder and fail to reach their potential at the critical crossroads. At an early age, Pacific Islander students need deep and broad educational experiences and opportunities to discover where they come from and create who they are as well as productive ways to express their growing, developing selves.

### **Methods for Meeting Needs of Target Community**

1. *We will provide rigor, relevance, and relationships needed by our students.* We provide a powerful education program using research-based teaching methods such as those found in the Expeditionary Learning school-reform model. Our curriculum is content-rich, gives students a drive or need to know something as it relates to something real and relevant in their lives, and is taught by teachers who know their students well. Everyone knows a child will thrive in many ways when given a close relationship with an adult. Pacific Islander children are no strangers to relationships, their lives are full of relationships with cousins, aunties, uncles, grandparents, and 'friends who are like



cousins'. We will take this strength one step further by breaking down the barriers between the school and the home. Our school will become a 'Learning Village', a Family Learning Center, where parents and their extended families bring their children to learn and where they too gather together in the joy of learning and being together. Education becomes a social affair and teachers, administrators, and staff become part of the family. Pacific Heritage Academy sets the standard in creating a new culture of learning in our school, the family, the community.

2. *We will specify and personalize education.* We provide a program that includes language, culture, and relationships- an enduring and meaningful education using culture-based education and a heritage language program using parents and community members to assist. It will be evident that that the school and its programs were created with Pacific Islanders in mind. It will be seen, it will be felt. At PHA education is regarded as a process, a unique and life-long process that is Pacific Islanders are capable and competent to pursue.

3. *We will consistently involve and empower parents.* We use the research-based parent and community involvement model by NNPS to help us consistently keep families and communities involved on all levels.

### **Cultural Considerations: Acknowledging and Preparing for Our Diverse Students**

When working with a particular target population, it is essential to acknowledge and utilize information that assists school leaders and teachers to deal effectively with the real differences in communication and behaviors, values and thought processing. As a founding board, we benefit greatly from the representation of members from different cultural groups within the broad category of 'Pacific Islander'. Our combined understanding and sensitivity to cultural differences is an asset which will help this organization in the months and years to come as we serve this unique and diverse population. The following is a sampling of common cultural issues affecting the educational setting that will need to be incorporated into professional development trainings as well as implemented among leadership at the administrative and board levels for those who do not know.

### **Pervasive Cultural Values to Recognize**

Generally, Pacific Islanders place great importance on cultural heritage, valuing and honoring their traditional knowledge and customs. A disclaimer is that Pacific Islander students who have been in the United States for two or more generations are more acculturated by Western norms and may reflect a more Western perspective to

family/community relationships and instructional/home practices. Extended family plays an important role in island cultures, where reverence is given to elders in the family structure. The notion of sharing and borrowing rather than owning things is a common practice. Stinginess and hoarding are discouraged, as are laziness, over-dependence and gluttony. Many Pacific Islander family structures are multigenerational within the same household, and there are often generational norms in a village structure in which there are village chiefs and elders. Time orientation is past-oriented in that children who misbehave impact the reputation of their entire family, who may then be required to give a public apology to the entire village for the misdeed. Honor is very important and reflects generationally upon the family.

### **Cultural Cues in the Educational Environment**

The following are helpful cultural cues when working with Pacific Islanders. These are examples of things our faculty and staff will be fully aware of and sensitive to in our learning environment. Having a focus on this target market allows us to specify and specialize the ways we interact in our learning community and with regard to our target population. Some of these will indicate reasons the Expeditionary Learning model is being considered as an effective instructional method for our target population. Likewise, the reader will see reasons for some of the other structures, policies, and other functions proposed in this document.

#### **Dos**

- Be aware that students often exhibit more informal physical contact with both peers and adults, which reflects a more informal “village” structure of community (all adults are parents and may instruct or correct).
- Include opportunities throughout the curriculum to apply concepts and skills to authentic situations.
- Experiential and relational learning is the preferred learning style and reflects the more hands-on learning that takes place in many of their village communities.
- Some students from Pacific Island nations may not have received any formal education in their native country. Solicit natural examples of content to help them make connections to instruction. For example, a student might be asked what kinds of natural materials were used to learn math concepts, or the teacher might invite the student to share a favorite story to teach a concept. In addition, cultural information may be shared regarding favorite foods, music, dance, etc.
- Consider including more informal furnishings and grouping arrangements in your classroom organization. Informal classroom organization with soft lighting and furnishings is preferred to more formal environments such as single desks in straight rows.



- Be aware that students interact with adults consistently with adults cross-generationally. Student may take a more informal stance with their instructors as they perceive every adult as a teacher.
- Scaffold expectations for participation to avoid shaming the students, for example forewarning the student they may be called on and making sure the question is one the student can answer.
- Be aware that when contacting parents, student misbehavior is often severely dealt with in order to allow the family to save face.

### **Don'ts**

- Avoid insisting the student meet a teacher's eyes which can cause significant discomfort for the student. Students often practice a "no direct eye contact" protocol in interacting with adults. In many island cultures, it is deemed disrespectful and a sign of defiance for a child to meet the eye of an adult when being asked a direct question or given an instruction or reprimand.
- Don't forget to include authentic application opportunities. Students do not tend to respond well to artificial scenarios such as lecture and context-reduced learning dominated by textbooks and worksheets as it is missing the application piece.
- Avoid direct questioning as it may be perceived as an attempt to shame the student who may not have the answer. Provide opportunities to have the student share on their own terms when trying to make connections.

### Other Sources:

Central Intelligence Agency. *CIA – The World Factbook*.  
[www.cia.gov/library/publications/theworld-factbook/](http://www.cia.gov/library/publications/theworld-factbook/).

Minzghor, Kehaulani, Language Arts TOSA for Portland Public Schools, in conjunction with Pat Yamamoto, faculty at the Hawaii Department of Education, University of Hawaii and referencing information from Keoni Inciong, Hawaii State Specialist on Hawaiian and Blayne Ohtani, New Teacher Induction Coordinator at Waianae High School, Waianae, Hawaii. Email interview. February, 2009.

U.S. Census Bureau. "State and Country QuickFacts."  
<http://quickfacts.census.gov/qfd/states/41/4159000.html>. U.S. Department of State.  
[www.state.gov/](http://www.state.gov/)

## SECTION 4

# CALENDAR AND BELL SCHEDULE

Pacific Heritage Academy has chosen to operate on a modified year-round or 'balanced' calendar. At PHA year-round schooling is not an extension of the school year, but, rather, a reorganization of it.

Calendars and bell schedules follow.



# Pacific Heritage Academy

## 2012 – 2013 (Modified Year-Round) Calendar

Pacific Heritage Academy follows similar calendars of districts with year-round options.  
The 2012-2013 school-year calendar is tentative and may be subject to change.

<p>20-24 Teacher/Staff Orientation Meeting 28 Board Meeting 29 Teacher Professional Development Day 30 Meet &amp; Greet</p>	<table border="1"> <thead> <tr> <th colspan="7">AUGUST 2012</th> </tr> <tr> <th>S</th> <th>M</th> <th>T</th> <th>W</th> <th>Th</th> <th>F</th> <th>S</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> </tr> <tr> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> </tr> <tr> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> </tr> <tr> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>31</td> <td></td> </tr> </tbody> </table>	AUGUST 2012							S	M	T	W	Th	F	S				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		<table border="1"> <thead> <tr> <th colspan="7">SEPTEMBER 2012</th> </tr> <tr> <th>S</th> <th>M</th> <th>T</th> <th>W</th> <th>Th</th> <th>F</th> <th>S</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>1</td> </tr> <tr> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> </tr> <tr> <td>9</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> </tr> <tr> <td>16</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> </tr> <tr> <td>23</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> </tr> <tr> <td>30</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>3 Labor Day (No School) 5 First Day of School Beginning of 1<sup>st</sup> Term &amp; Parent – Peek Night 18 PFO Meeting 18 Board Meeting/Parent-Advisory Council 28 Bula (Fijian) Festival</p>	SEPTEMBER 2012							S	M	T	W	Th	F	S							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						
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**8 – 5/10 Spring IOWA**  
**16** Board Meeting/Parent-Advisory Council  
**16** PFO Meeting  
**22 – 5/10 DWA**  
**26** Parent-Teacher Conference

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1 "Lei Day" Celebration  
 10 End of 3<sup>rd</sup> Term (Early Out @ 1PM) / Teacher Professional Development  
 13-24 Off-Track (No School)  
 27 Memorial Day (No School)  
 28 Beginning of 4<sup>th</sup> Term & Parent-Peek Night  
 28 Board Meeting/Parent-Advisory Council  
 28 PFO Meeting  
 31 Heiva i Pacific Heritage Academy

7 Samoa Independence Flag Day Celebration  
 18 Board Meeting/Parent-Advisory Council  
 18 PFO Meeting  
 21 Heilala Tongan Celebration  
 17 – 7/23 Core CRT  
 19-28 Board Election

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28	29	30	31			

3 Freedom Fest—4<sup>th</sup> of July  
 4 Independence Day (No School)  
 5 No School  
 11 Student-Led Conference  
 16 Board Meeting/Parent-Advisory Council  
 19 Student-Led Conference  
 26 Celebration of Learning & Hokule'a Lu'au  
 30 End of Classwork for Students  
 31 End of 4<sup>th</sup> Term & Official School Year Ends (Early Out @ 1PM)

- First and Last of School
- First and Last Day of Term
- Student Test Day (IBST, CRT, ELP, NAEP DWA)

- School Closed
- Student-Led Conferences / Parent-Teacher Conferences

If any adjustments are necessary the school board will make those considerations.

2012 – 2013 SCHOOL YEAR-ROUND CALENDAR:	
Orientation Meetings for Teachers & Staff	Monday – Friday, Aug. 20 – 24, 2012
Board Meeting	Tuesday, Aug. 28
Teacher Professional Development Day	Wednesday, Aug. 29, 2012
Meet & Greet (for Parents, Students and Teachers)	Thursday, Aug. 30, 2012
All Teachers at Academy	Tuesday, Sept. 4, 2012
Official School Year & Student Classwork Begins	Wednesday, Sept. 5, 2012
Parent Peek Night	Wednesday, Sept. 5, 2012
PFO Meeting	Tuesday, Sep. 18, 2012
Board Meeting	Tuesday, Sep. 18, 2012
Bula Festival (Fiji)	Friday, Sep. 28, 2012
Parent-Teacher Conference	Friday, Oct. 26, 2012
End of 1 <sup>st</sup> Quarter/Teacher Professional Development Day	Friday, Nov. 9, 2012
Beginning of 2 <sup>nd</sup> Term	Monday, Nov. 26, 2012
Parent-Peek Night	Monday, Nov. 26, 2012
PFO Meeting	Tuesday, Nov. 27, 2012
Hokule'a Lu'au, A Celebration of Learning	Friday, Dec. 14, 2012
PFO Meeting	Tuesday, Dec. 18, 2012
Board Meeting	Tuesday, Dec. 18, 2012
ELP Assessment	Monday, Jan. 14 – Friday, May 10, 2013
PFO Meeting	Tuesday, Jan. 15, 2013
Board Meeting	Tuesday, Jan. 15, 2013
NAEP	Tuesday, Jan. 22 – Thursday, Mar. 14, 2013
Student-Led Conference	Friday, Jan. 25, 2013



Celebration of Learning	Friday, Feb. 1, 2013
Waitangi Day (New Zealand/Aotearoa)	Friday, Feb. 1, 2013
PFO Meeting	Tuesday, Feb. 5, 2013
Board Meeting	Tuesday, Feb. 5, 2013
End of 2 <sup>nd</sup> Term/ Teacher Professional Development Day	Friday, Feb. 8, 2013
End of 1 <sup>st</sup> Semester	Friday, Feb. 8, 2013
EL National Conference (No School)	Monday, Feb. 25 – Friday, March 1, 2013
Beginning of 3 <sup>rd</sup> Term	Monday, Mar. 4, 2013
Parent-Peek Night	Monday, Mar. 4, 2013
PFO Meeting	Tuesday, Mar. 19, 2013
Board Meeting	Tuesday, Mar. 19, 2013
Spring IOWA	Monday, Apr. 8 – Friday, May 10, 2013
PFO Meeting	Tuesday, Apr. 16, 2013
Board Meeting	Tuesday, Apr. 16, 2013
DWA	Monday, Apr. 22 – Friday, May 10, 2013
Parent-Teacher Conference	Friday, Apr. 26, 2013
May Day "Lei Day" Celebration (Hawai'i)	Tuesday, May 1, 2013
End of 3 <sup>rd</sup> Term/ Teacher Professional Development Day	Friday, May 10, 2013
Beginning of 4 <sup>th</sup> Term	Monday, May 28, 2013
Parent-Peek Night	Monday, May 28, 2013
PFO Meeting	Tuesday, May 28, 2013
Board Meeting	Tuesday, May 28, 2013
Heiva I Pacific Heritage Academy (Tahiti)	Friday, May 31, 2013
Samoa Independence Flag Day Celebration (Samoa)	Friday, Jun. 7, 2013
PFO Meeting	Tuesday, Jun. 18, 2013
Board Meeting	Tuesday, Jun. 18, 2013
Heilala Celebration (Tonga)	Friday, Jun. 21, 2013
Board of Directors Election	Wednesday – Friday, Jun. 19 – 29, 2013
Core CRT	Monday, Jun. 17 – Tuesday, Jul. 23, 2013
Freedom Fest – 4 <sup>th</sup> of July	Wednesday, Jul. 3, 2013
PFO Meeting	Tuesday, Jul. 16, 2013
Board Meeting	Tuesday, Jul. 16, 2013
Student-Led Conference	Friday, Jul. 19, 2013
Hokule'a Lu'au, A Celebration of Learning	Friday, Jul. 26, 2013
End of Classwork for Students	Tuesday, Jul. 30, 2013
End of 2 <sup>nd</sup> Semester	Wednesday, Jul. 31, 2013
Official School Year Ends & Student Classwork Ends; End of 4 <sup>th</sup> Term	Wednesday, Jul. 31, 2013

<b>HOLIDAYS AND OTHER DAYS SCHOOL WILL BE CLOSED:</b>	
EL Regional Summit (Faculty Training)	Monday, Oct. 22 – Tuesday, Oct. 23, 2012
Off-Track (Fall Intersession)	Monday, Nov. 12 – Friday, Nov. 23, 2012
Winter Break	Wednesday, Dec. 24, 2012 – Tuesday, Jan. 1, 2013
EL Local Workshop (Faculty Training)	Thursday, Jan. 17 – Friday, 18, 2013
Martin Luther King, Jr.	Monday, January 21, 2013
Off-Track (Winter Intersession)	Monday, Feb. 11 – Friday, Feb. 22, 2013
EL National Conference (Faculty Training)	Monday, Feb. 25 – Friday, Mar. 1, 2013
Spring Break	Wednesday, Mar. 27 – Friday, Mar. 29, 2013
Off-Track (Spring Intersession)	Monday, May 13, 2013 – Friday, May 24, 2013
Memorial Day	Monday, May 27, 2013
Independence Day	Thursday, July 4, 2013 – Friday, July 5, 2013



<b>TEACHER PROFESSIONAL DEVELOPMENT:</b>	
In keeping with the Expeditionary Learning model, our faculty and staff will receive regular and on-going professional development training, specifically when school is dismissed early on Fridays (including end of quarters), as well as Expeditionary Learning Local Workshops, Regional Summits or National Conferences.	
Wednesday, Aug. 29, 2012	8 hours
Friday, November 9, 2012	3 hours
Friday, February 8, 2013	3 hours
Friday, May 10, 2013	3 hours
Wednesday 31, 2013	3 hours
<b>Total Hours for Teacher Development Days:</b>	<b>20 hours +</b>

<b>BOARD MEETINGS:</b>	<b>PARENT &amp; FAMILY ORGANIZATION (PFO) MEETINGS:</b>
Tuesday, Sep. 18, 2012	Tuesday, Sep. 18, 2012
Tuesday, Oct. 16, 2012	Tuesday, Oct. 16, 2012
Tuesday, Nov. 27, 2012	Tuesday, Nov. 27, 2012
Tuesday, Dec. 18, 2012	Tuesday, Dec. 18, 2012
Tuesday, Jan. 15, 2013	Tuesday, Jan. 15, 2013
Tuesday, Feb. 5, 2013	Tuesday, Feb. 5, 2013
Tuesday, Mar. 19, 2013	Tuesday, Mar. 19, 2013
Tuesday, Apr. 16, 2013	Tuesday, Apr. 16, 2013
Tuesday, May 28, 2013	Tuesday, May 28, 2013
Tuesday, Jun. 18, 2013	Tuesday, Jun. 18, 2013
Tuesday, Jul. 16, 2013	Tuesday, Jul. 16, 2013

<b>FALL/WINTER PARENT TEACHER &amp; STUDENT-LED CONFERENCES:</b>	
Parent-Teacher Conference	Friday, Oct. 26, 2012
Student-Led Conference	Friday, Jan. 25, 2013
<b>SPRING/SUMMER PARENT TEACHER &amp; STUDENT-LED CONFERENCES:</b>	
Parent-Teacher Conference	Friday, Apr. 26, 2013
Student-Led Conference	Friday, Jul. 19, 2013

<b>QUARTERS:</b>		
1 <sup>st</sup> Quarter	Wednesday, Sep. 5 – Friday, Nov. 9, 2012	46 days
2 <sup>nd</sup> Quarter	Monday, Nov. 26, 2012 – Friday, Feb. 8, 2013	46 days
3 <sup>rd</sup> Quarter	Monday, Mar 4 – Friday, May 10, 2013	45 days
4 <sup>th</sup> Quarter	Monday, May 28 – Friday, Jul. 31, 2013	45 days
<b>END OF QUARTERS:</b>		
1 <sup>st</sup> Quarter	Friday, Nov. 9, 2012	
2 <sup>nd</sup> Quarter	Friday, Feb. 8, 2013	
3 <sup>rd</sup> Quarter	Friday, May 10, 2013	
4 <sup>th</sup> Quarter	Friday, Jul. 31, 2013	

<b>SEMESTERS:</b>		
1 <sup>st</sup> Semester	Wednesday, Sep. 5, 2012 – Friday, Feb. 8, 2013	
2 <sup>nd</sup> Semester	Monday, Mar. 4, 2013 – Wednesday, Jul. 31, 2013	
<b>Student School Schedule:</b>	Monday – Thursday 8:30 a.m. – 3:20 p.m.	Friday 8:30 a.m. – 1:40 p.m.
<b>Teacher School Schedule:</b>	Monday – Thursday 8:00 a.m. – 4:00 p.m.	Friday 8:00 a.m. – 4:00 p.m.
<b>Total Student Contract Days:</b>	183	
<b>Total Student Instructional Hours:</b>	1002.26	
Emergency closures will be made up on Spring Break.		



**DAILY SCHOOL SCHEDULE:**

While creating a daily/weekly class schedule will be a collaborative effort among the Director and staff, an example would be:

**Monday – Thursday:**

		<b>Option A (1-5)</b>	<b>Option B (6-8)</b>
8:30 AM	9:20 AM	Class I (includes Morning Meeting)	Block 1 – English & Social Studies
9:20 AM	9:25 AM	Transition	
9:25 AM	10:15 AM	Class II	
10:15 AM	10:25 AM	Morning Meeting/Recess	Morning Meeting/Recess
10:25 AM	11:15 AM	Class III	Block 2 – Math & Science
11:15 AM	11:20 AM	Transition	
11:20 AM	12:10 AM	Class IV	
12:10 AM	12:40 PM	Lunch	Lunch
12:40 PM	1:30 PM	Class V	Block 3 – Special Subjects (includes Crew Meeting)
1:30 PM	1:35 PM	Transition	
1:35 PM	2:25 PM	Class VI	
2:25 PM	2:35 PM	Afternoon Recess	Afternoon Recess
2:35 PM	3:25 PM	Class VII	Block 4 – Physical Education
3:25 PM		Dismissal	Dismissal
3:25 PM	4:00 PM	Optional Enrichment	Optional Enrichment

		<b>Kindergarten – Early Manu (Birds)</b>	
8:30 AM	10:05 AM	Instruction – Class I	
10:05 AM	10:25 AM	Snack/Outdoor Activities	
10:25 AM	11:25 AM	Instruction – Class II	
11:25 AM		Dismissal	
		<b>Kindergarten – Late Lulu (Owls)</b>	
12:30 PM	2:05 PM	Instruction – Class I	
2:05 PM	2:25 PM	Snack/Outdoor Activities	
2:25 PM	3:25 PM	Instruction – Class II	
3:25 PM		Dismissal	



**Aloha Friday (early-out) Schedule:**

		<b>Option A (K-5)</b>	<b>Option B (6-8)</b>
8:30 AM	9:05 AM	Class I (includes Morning Meeting)	Block 1 – English & Social Studies
9:05 AM	9:10 AM	Transition	
9:10 AM	9:45 AM	Class II	
9:45 AM	9:55 AM	Morning Meeting/Recess	Morning Meeting/Recess
9:55 AM	10:30 AM	Class III	Block 2 – Math & Science
10:30 AM	10:35 AM	Transition	
10:35 AM	11:10 AM	Class IV	
11:10 AM	11:40 AM	Lunch	Lunch
11:40 AM	12:15 AM	Class V	Block 3 – Special Subjects (includes Crew Meeting)
12:15 AM	12:20 PM	Transition	
12:20 PM	12:55 PM	Class VI	
12:55 PM	1:05 PM	Afternoon Recess	Afternoon Recess
1:05 PM	1:40 PM	Class VII	Block 4 – Physical Education
1:40 PM		Dismissal	Dismissal
2:00 PM	4:00 PM	<i>Teacher Professional Development</i>	<i>Teacher Professional Development</i>

		<b>Kindergarten – Early Manu (Birds)</b>
8:30 AM	9:30 AM	Instruction – Class I
9:30 AM	9:45 AM	Snack/Outdoor Activities
9:45 AM	10:40 AM	Instruction – Class II
10:40 AM		Dismissal
		<b>Kindergarten – Late Lulu (Owls)</b>
11:30 AM	12:30 PM	Instruction – Class I
12:30 PM	12:45 PM	Snack/Outdoor Activities
12:45 PM	1:40 PM	Instruction – Class II
1:40 PM		Dismissal
2:00 PM	4:00 PM	<i>Teacher Professional Development</i>



## Notes on Calendar and Schedule:

- Pacific Heritage Academy has chosen to operate on a modified year-round or 'balanced' calendar. This decision was made following a study of the research on traditional school year calendars and alternative calendars. The modified calendar has proponents and opponents yet the approach is becoming an attractive strategy for more and more schools and districts. The National Association for Year-Round Education (NAYRE) reports a 441 percent growth since the mid-1980s in the number of students receiving a year-round education.

At PHA year-round schooling is not an extension of the school year, but rather, a reorganization of it. The PHA school year is comprised of 183 days and 1002.26 total student hours of instruction. The state of Utah requires 180 days and 990 total instructional hours. PHA roughly uses what is called the 45-15 model in which school is in session for approximately 45 days or 9 weeks after which students are on a break for approximately 15 days or 3 weeks. This calendar allows students to have a more balanced year of academics and gives the school a way to provide optional inter-sessions, during which remedial opportunities focusing on reading and mathematics, intensive English as a second language study, enrichment, and acceleration are provided. The traditional summer break is broken up and redistributed throughout the year in relatively regular intervals that are more balanced for the primary reason of preventing summer time learning loss.

Research shows that a three-month summer break contributes to students' forgetting what they have learned the previous year. The result is that teachers need to review material at the start of the next school year, wasting valuable instructional time. A review of 39 studies confirmed summertime learning loss, specifically indicating that student test scores drop over summer vacation and that mathematics performance deteriorates more than reading performance (Cooper, et al., 1996). Others believe that year-round schooling boosts performance because the more frequent but shorter breaks allow struggling students extra time for remedial help (Ballinger, 1995).

Ballinger, C., "**Prisoners No More,**" *Educational Leadership*, 53 (3), 1995.

Cooper, H., Nye, B., Charlton, K., Lindsay, J., and Greathouse, S., "**The Effects of Summer Vacation on Achievement Test Scores: A Narrative and Meta-Analytic Review,**" *Review of Educational Research*, 66 (3), pp. 227-68, 1996.

Potts, A., Blank, R.K., and Williams, A., "**Key State Education Policies on PK-12 Education: 2002,**" **Council of Chief State School Officers**, 2002.  
(Requires **Adobe's Acrobat Reader.**)

- Regular daily schedule (Monday – Thursday) as outlined above, provides teachers and students necessary blocks of time in which to delve into the exploration of their themes and topics. Notice that lower grades have shorter blocks (classes/periods), and more transitions each day than the 6<sup>th</sup> – 8<sup>th</sup> grade. This is to accommodate the shorter attention span and the need for movement. AM/PM Kindergarten will be offered with a shortened schedule for early-out Fridays.
- Once a week our learning community gathers in larger community groups to communicate, discuss, share and learn together. This effective practice contributes to predictable social interaction, gives a place and reason to communicate meaningfully in collaborative ways as a community, and over time, defines important features and values within the school culture. Once a week “Morning Meetings” occur for grades K-5 and “Crew Meetings” as needed for grades 6-8.
- By design, Learning Expeditions (long-term thematic, integrated curricular studies) are planned using the Utah Standards and Benchmarks. Much of the required content may be taught within the context of the Learning Expedition, however, content requiring skill progression and development (such as reading and math), is also given specific allocation of time within the daily schedule. This specific and explicit instruction of content is given as often as needed to ensure student success.
- Learning at Pacific Heritage Academy gives students compelling reasons to learn to read, write, spell, speak and solve problems, thus improving their academic, social, cultural and developmental needs by infusing all aspects of the educational experience. Based on the ten Design Principles and Core Practices of Expeditionary Learning, the PHA approach to learning will be backed by current research and best practice. Learning at PHA is not confined to an explicit subject; nor is it addressed only in the course of Learning Expeditions. Rather, it involves a way of thinking, of teaching, and of organizing time and experiences so that learning occurs all day long for all students. As described earlier, each day includes time for community gatherings (Morning Meetings and Crew Meetings) where our school culture shapes and promotes learning. Time spent building the



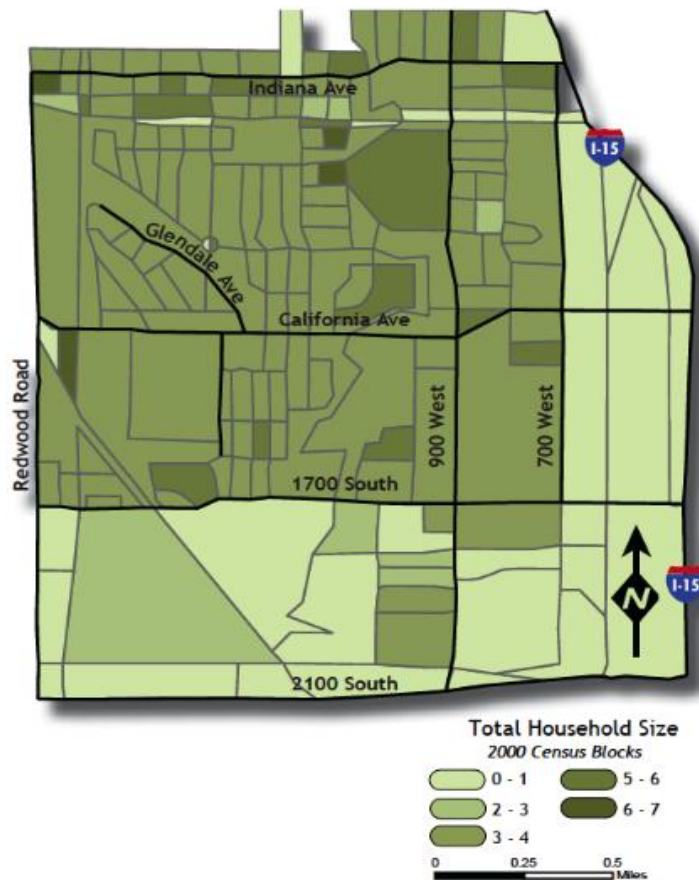
school and classroom culture supports learning and becomes as important as the time spent on explicit instruction in a particular content area.

## SECTION 5

# MARKET ANALYSIS

Pacific Heritage Academy is proposed for the culturally diverse Salt Lake City community of Glendale. This location was chosen for its close proximity to a large concentration of multicultural students, specifically our target population of Pacific Islanders who are heavily concentrated in the northwest areas of Rose Park, Poplar Grove, and Glendale as well as in West Valley City to the southwest. The school will be well-located to offer its program to the largest number of Pacific Islanders as possible and to partner with the Salt Lake City School District and neighboring Granite District, which together educate the greatest numbers of Pacific Islander and minority students in the state. With our facility located just west of downtown Salt Lake City, we are confident that many families all over the valley will find easy access to our unique program. Details of location planning and the specific properties and types of facilities under consideration can be found in Section 6: Capital Facility Plan.

The map below provides a visual of the Glendale area chosen as the home of Pacific Heritage Academy. The map is also shaded to show Glendale as a high density community with large households with school-aged children.



*Figure 1: Glendale Geographic Boundaries, Household Size*

### Demographics of the Target Communities

As stated previously, Glendale and its neighbor communities are central to a large Pacific Islander population. The school location is also appealing to other demographic groups including ethnic minorities and a low-income population, both demographics considered risk factors in students. Figure 2 below uses census data to show Glendale to be one of Salt Lake City’s most ethnically and culturally diverse neighborhoods. Latinos make up the largest segment of the population, followed by Pacific Islanders and the “Other Race” category. Identified communities include newer East Asian immigrants, such as Hmong and Laotian families as well as African Americans, and Native Americans. Each of these populations within the Glendale community is relatively similar in socioeconomic ways to our target population making our program very amendable to the background of this whole variety of multicultural students.

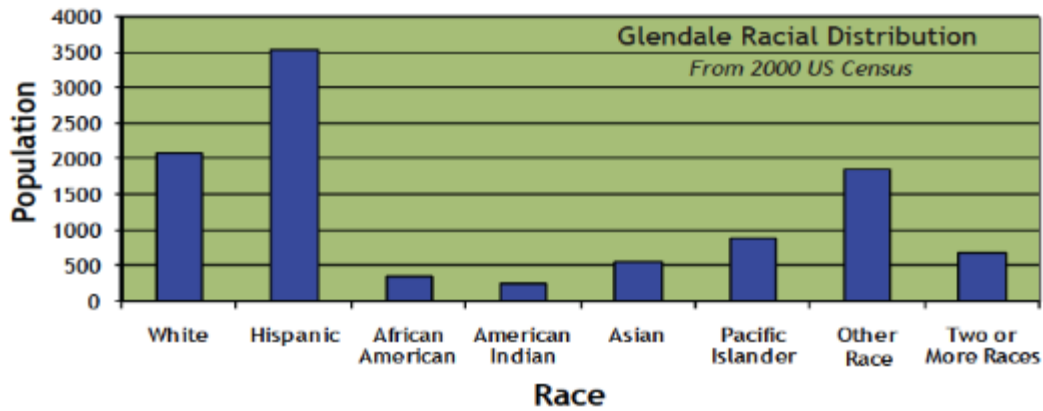


Figure 2: Glendale Racial Distribution

In fact, Glendale is historically significant as an immigrant and multi-ethnic community of Pacific Islanders, Latinos, and Asians for more than fifty years. A community study by the University of Utah found that at least 28 different languages are spoken in this neighborhood, characterized by large families and a high population of school-age children. Living in mostly single-family homes surrounded by industrial properties west of the downtown area, the university study also showed that Glendale citizens are concerned with gang issues, crime, and education. Our educational offerings will attract any of these families who desire a new choice in public education for their children. Our emphasis on global and cultural studies also appeals to government and community organizations and leaders in the Glendale area who are working to grow tolerance, unity and understanding within the community. A strong endorsement of our efforts is offered in three letters of support which are included in the charter proposal. (Strong, Christopher, et al. "Glendale: Neighborhood Centers." *The University of Utah: College of Architecture and Planning, Fall 2008*).

### Market Trends

We evaluated the economic/business pulse as well as the educational landscape and the current state of well-being of Pacific Islanders in the Glendale area as markets we are preparing to enter. Our study showed several trends that indicate a unique opportunity to fill current needs identified in the community. These trends also support this location as the site for Pacific Heritage Academy.

First, Glendale is home to many small, locally owned businesses and has a small but vibrant neighborhood business center. Currently, in response to needs of the citizens,



local city government has initiated a number of revitalization projects including a library and a multi-use plaza district. We are pleased to contribute to this ongoing trend of developing community resources and revitalizing the Glendale Area by offering a new educational service tailor-made for this unique multicultural community. We anticipate a very heavy involvement in the community due to our teaching methodology which relies on and strongly utilizes the surrounding community. Pacific Heritage Academy will be a visible, active catalyst invigorating the community as it seeks issues to study, experts and professionals to enrich learning, and projects that offer learning and opportunities for giving service. (Strong, Christopher, et al. "Glendale: Neighborhood Centers." *The University of Utah: College of Architecture and Planning, Fall 2008*).

Second, the Salt Lake City School District is a leader in educating a growing number of ethnic minority students in Utah. As a relatively small district, SLCS D educates the greatest percentage, 55.3%, of ethnic students statewide and the greatest percentage of Pacific Islander students, 4.8% of the district's total students.

USOE District	Total Students Enrolled	Ethnic Students (Percentage)	Pacific Islander Students (Percentage)
Granite	68,131	28,639 (42% )	2,674 ( 9.3% of ethnic students, 3.9% of total students)
Salt Lake	23,850	13,191 ( 55.3%)	1,159 (8.7% of ethnic students, 4.8% of total students)

(USOE 2009-10 Fall Enrollment data statistics [www.schools.utah.gov](http://www.schools.utah.gov))

The chart below shows that each Salt Lake City District elementary school in the immediate Glendale area is serving extraordinary numbers of ethnic, Pacific Islanders, and economically disadvantaged students. Surrounding schools to the north and east, all in our catchment or target demographic have very similar data.



SLSC Schools serving the Glendale Population	Non-Caucasian Student enrollment	Pacific Islander enrollment	Economically Disadvantaged	Most Recently Passed AYP
Parkview Ele	83%	6% (29)	89%	No
Mountainview Ele	90%	4% (84)	92%	No
Riley Ele	82%	11% (48)	89%	No
Glendale Middle	87%	12% (91)	95%	Yes

(Source: School Improvement Plans data at [www.slc.k12.ut.us/schools](http://www.slc.k12.ut.us/schools))

Also noteworthy is the fact that the three traditional district high schools which serve the west, Glendale area and the north and south Salt Lake areas (West, East, and Highland) also did not make AYP last year (2009-10).

Third, many citizen and community efforts have been initiated to intervene on the behalf of at-risk youth in the area, some particularly targeting Pacific Islanders. While gang-related violence has been a particular area of concern in the Salt Lake valley, other organizations have focused on offering positive role models, mentoring and identity formation for minority youth. After school programs are the most prevalent avenue of service delivery for these efforts. Pacific Heritage Academy will complement these efforts already underway by effectively addressing the whole child through an all-day comprehensive educational program. We believe education to be the greatest prevention tool available for families and communities and are pleased to offer a customized way to address the roots of a multitude of problems in the home and community as families choose to become part of our charter school.

A fourth trend is seen in the education of racial and ethnic minorities in the United States. According to the National Institute for Educational Statistics, the percentage of total undergraduate enrollment between 1976 and 2004 who were minority students increased from 17 to 32 percent. In 2005, Asian/Pacific Islander and White school-aged children were found more likely to have parents with higher levels of educational attainment than were Black, Hispanic, and American Indian/Alaska Native children. These statistics show that a growing number of ethnic minorities including newer immigrants such as Pacific Islanders are adjusting to the American way of life and gaining education over time. Pacific Heritage Academy is prepared to educate the children of a growing number of young families who are becoming more educated and more aware of the benefits of education than previous generations have been. (*National Institute for Educational Statistics, <http://nces.ed.gov/pubs2007/minoritytrends>*)



A fifth trend to note is that the overall population of Utah is expected to grow, and ethnic minorities are expected to grow at rates that far exceed the average. Utah is expected to gain 80 thousand people through international migration between 1995 and 2025. Statistics predict Non-Hispanic Asians and Pacific Islanders would increase from 2.3 to 3.7 percent of the 2025 state population. Persons of Hispanic origin are projected to increase from 5.6 percent to 9.2 percent of the 2025 state population. Pacific Heritage Academy has a model and offering which will continue to be viable for many years to come as it serves Utah’s growing ethnic community. *(Figures are from Series A (the Preferred Series) as reported in Campbell, Paul R., 1996, "Population Projections for States" cited from US Census).*

A final trend is interesting and comes from US Census data (see Figure 3) which indicates that the majority of households in the Glendale area earn between \$20,000 - \$29,000 per year and the second largest income bracket is \$10,000-\$19,000. Overall the population of Glendale is young and low-income, yet eager to embrace growth and new resources. Pacific Heritage Academy will appeal to local residents who, in spite of economic constraints, desire their children to have a high-quality choice in education. We believe the low incomes of families in the Glendale area should not and need not indicate or predict the scholastic achievement of their children.

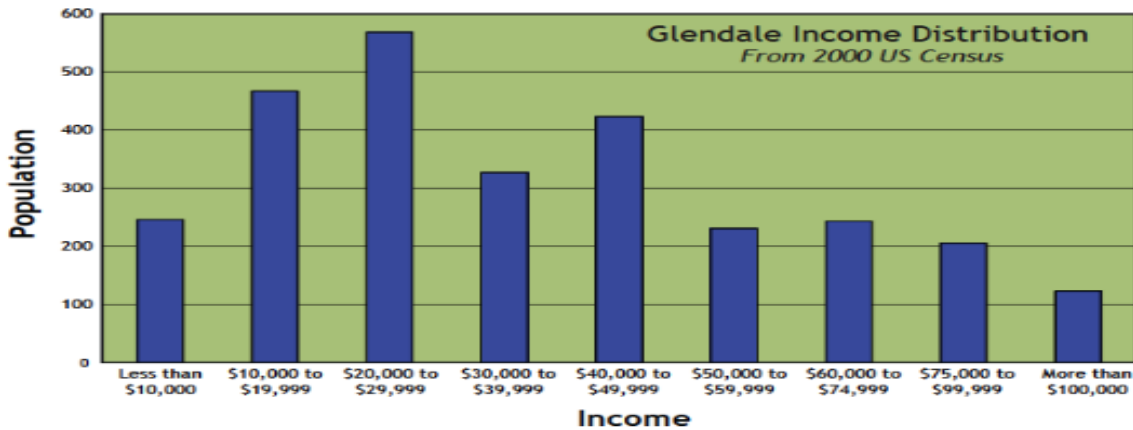


Figure 3: Glendale Income Distribution

### Competitive Advantage

Given current trends outlined here and the outreach and other efforts in motion, we anticipate that residents of the Glendale area as well as families from across the Salt Lake Valley will welcome Pacific Heritage Academy wholeheartedly.



In particular, the focus on global awareness and cultural competencies will resonate for parents who carry out their daily lives in a range of multicultural and multilingual contexts. While the primary target population will be students of Pacific Islander heritage, all students from families with concern about preparing their children to function in the global world of the 21<sup>st</sup> Century will thrive at Pacific Heritage Academy. This is increasingly a concern and goal within education and among parents who see the realities of a global economy and the need for children to understand and communicate within a global society. We are ready to meet this challenge and lead the way in offering students a broad and deep view into the new 21<sup>st</sup> Century.

Another unique aspect of Pacific Heritage Academy is our commitment to effective methodologies and instructional practices. As mentioned, the Expeditionary Learning, a research-based school design model and a nationally recognized organization is being considered for use at PHA. This model is currently used in only two charter schools in Utah, one in Kearns and the other in Ogden. Both of these schools are not only geographically out of reach for our target group, but are at maximum enrollment and have waiting lists. Limited access to this 21<sup>st</sup> century learning model with its effective methodology will give us a competitive advantage in the Salt Lake area. The model was chosen, in part, for its ability to provide a recognizable and trusted 'brand' of education that would include rigorous academic training and provide the platform and values where cultural topics and heritage themes could be taught in a cohesive, involved, and stimulating fashion.

Lastly, our model to build learning around social and cultural studies is an innovation that provides a competitive edge. The state's growing minority population has produced an increase in ethnic student enrollment in Utah's schools. This reality brings a richness and diversity to the state that can be cultured, preserved and celebrated, not only by those with ethnic ancestry but by any and all of Utah's citizens. A state-chartered school with a cultural focus will be a unique and positive way to begin addressing growing needs within the educational system.

Other schools provide useful models for Pacific Heritage Academy's desire to promote cultural competencies, including Hawaii's well-regarded Kamehameha Schools. This organization has been dedicated to influencing Native Hawaiian children for over 120 years and is one of the nation's largest private education systems. Additionally, the state of Hawaii oversees 31 public charter schools, 15 of which have a Hawaiian focus. These schools are culturally driven, family-oriented and community-based organizations with missions aimed at helping students achieve at the highest levels, while actively contributing to the perpetuation of Hawaiian indigenous language,



culture and traditions. Initial studies point to positive, measurable results for students at these charter schools.

During our research we also found a young organization with Pacific Islander founders who have proposed a charter school for San Diego, California. Their proposal, however, has been to provide only a cultural component as part of their curriculum but culture is not used as a framework or base for curriculum teaching. As far as we can tell, Pacific Heritage Academy will be the first in the mainland US to do this with Pacific Island cultures and in a comprehensive and assertive way. Even among Hawaii's culture-based schools, none serve a wide Polynesian community but focus on Hawaiian studies specifically. We are pleased to offer our educational plan which targets the broad Utah Pacific Islander community.

### *Outreach*

Pacific Heritage Academy is a public charter school that receives federal funding and as such will not discriminate based on disability, race, creed, color, gender, sexual orientation, national origin, religion, or ancestry. Because of its understanding of prevailing cultural customs and ties to a variety of Glendale ethnic groups and cultures, PHA will be particularly adept at eliminating barriers that prevent some sectors of the population from enrolling in charter schools.

PHA understands that a major educational effort will need to be undertaken to ensure that Glendale and area residents understand the school is designed to serve students of all ethnic backgrounds who hope to incorporate global awareness and 21<sup>st</sup> century learning methods and skills into their school experiences. Recruiting efforts will target families of Pacific Islander heritage as well as community members of all ethnic and cultural backgrounds. We will do this with multi-language fliers going to west-side neighborhoods, and by utilizing translators at information meetings. In this way, we will ensure the school will be fully utilized by any in the community who desire our program offerings as an alternative that will benefit all children.

Fundamental to the school philosophy is a balance between looking inward at heritage cultures and looking outward at world cultures. While Pacific Islander cultures will often be a starting point for learning, they will not be a sole focus of the school. Instead, the sensitivity engendered by the study of particular world and community cultures will encourage students to embrace multiple points of view, growing global and cultural competencies in their worldwide explorations.



Our community research indicated that parents of children with Pacific Islander heritage were overwhelmingly interested in learning about the purposes of charter schools and were very enthusiastic about a school with the mission to emphasize heritage languages and incorporate cultural topics when teaching the curriculum. The community is highly interested and supportive of any efforts that help to address educational needs and give options that help inspire educational attainment.

Our community outreach for PHA began two years ago in the creation stages and is continuously giving every family the opportunity to meet with the Founding Committee and understand the mission and vision as it has developed through ongoing planning meetings. There has been open communication with the Pacific Islander community in Utah, reaching out to potential students and parents, and educating about the charter school opportunity in Utah. From March 2008 to October 2009, informational meetings and other events and presentations were given. Eighteen of these gatherings were held in public libraries, area parks, churches, and university campuses with a total of more than 300 attendees. We met with parents and community members all along the Wasatch Front from Salt Lake County to Utah County and even as far away as St George in Southern Utah. Our goal was to educate and inform the public about the idea of creating a charter school with a focus on Pacific Islander students.

As we anticipate the opening of the school in the Fall of 2012, Pacific Heritage Academy has a proactive recruitment plan that will actively advertise public information meetings, enrollment periods, and important dates and events. Fliers, signs and brochures and other printed media, approved by the Board will be distributed via online technology. Specifically, we maintain a growing list of over 200 email subscribers who receive e-newsletters and we communicate via Facebook, Twitter, and blogspot.com. These web-based approaches successfully target young parents who are tech-savvy, seeking options and concerned about education. These efforts are strong and growing as we continue to inform a large and growing base of over 530 Facebook "fans" about our charter school.

During the months of September and October of 2010 we decided to experiment using online survey technology (surveymonkey.com) to gather data on families interested in our school. The survey was sent to our email database with encouragement to pass it along to friends and family. Surprising to us, 85 parents completed our 'Intent to Enroll' survey submitting data on 235 students over the course of 6 weeks. Needless to say, we



are very excited about the amazing power of social networking- the modern way to unite and communicate about common causes.

We are also committed to using what we call ‘the coconut wireless’- the old fashioned person-to-person mode! We have graphic design experts who are ready to create appealing communications to be used on flyers and posters to invite parents to learn about our school. We will use these to draw attendees to public meetings, as well as notices in public libraries, and local store outlets as additional ways to communicate with our target market. We have a plan to connect in person with a wide range of community groups, religious leaders of all denominations, and cultural networks to further disseminate the mission and purpose of our school and its program. In these ways we feel confident we will effectively reach a great many families within Glendale and beyond.



*Figure 4: The Pacific Heritage Academy Logo*

As illustrated above in Figure 4, we have developed an attractive logo and school name which will become familiar to our target market, a brand that is already being remembered and responded to in the community. We believe it will become an image that will represent quality, uniqueness, and genuine intent in the service we are extending.

In Fall 2012 when the school opens, additional community outreach in related areas— adult literacy, heritage language preservation, and community health will be vehicles to continue an open relationship with our multicultural target community. In this way we will maintain a large and ready pool of interested families we desire to influence and serve through our unique educational programs and community services.

### **Collaboration & Partnerships**

At Pacific Heritage Academy we value the opportunities to partner and collaborate to fulfill our mission and reach our goals. We have had a great deal of success in our efforts and planning so far in connecting with ideal consultants, advisors, and partners.



We continue to be aware of ways to collaborate with others in the community who have experience and expertise to bring about the ambitious vision for our school.

*Expeditionary Learning Schools:* We have developed an ongoing relationship with western states leaders and school designers from this national organization. We have budgeted for an extensive professional development contract with a strong organization such as Expeditionary Learning Schools. We will ensure the correct and effective implementation of effective practices. We will take full advantage of powerful professional development models such as EL as we grow our organization of leaders and teachers with exceptional skills and passion for the learning process.

*Other Collaboration:* Because our curriculum emphasizes community service, we will seek to develop partnerships with the community including, the University of Utah, the City of Salt Lake, Utah State Parks & Recreation, local businesses, cities & counties, school districts, cultural organizations, local churches, and other non-profit groups.

## SECTION 6

# CAPITAL FACILITY PLAN

Founders of Pacific Heritage Academy have studied the facility plans of other successful charter schools and have consulted with real estate professionals concerning our facility options. Our research has included the assessment and exploration of needs, issues, and options for a facility which will move our organization forward wisely and efficiently upon approval. We have met with community members to assess issues of convenience and safety, city officials for historical information and future plans for the west Salt Lake City area, and real estate professionals for market conditions and property values. Finance and charter experts have also helped us to explore examples of financing and facility development experiences by charter schools in Utah. The plan we have subsequently developed aligns with our values and goals, is appropriate to current economic realities, and will be fundamental in executing our program of instruction and accomplishing our overall mission. Following is our strategy to acquire, finance, and maintain our chosen facility.

### OUR APPROACH TO ACQUIRING A FACILITY

We are taking the approach of “Education First, Building Second” –meaning we don’t want to get into a situation with our facility that limits our ability to provide a solid education to our students. We will be very careful that we don’t get ourselves into a lease or purchase agreement that will lock us into overhead expenses that limit our ability to hire teachers, purchase equipment and supplies, and afford anything else crucial to the teaching of the students. We are committed to eventually owning our own facility and will do that when, simply, we can comfortably afford it.



### **Short term plan**

We will most likely start our school in an existing building on a lease basis. We want a situation where we can scale up the size of the facility based on the student enrollment. (We hope and expect to open our doors with full enrollment but we can't count on it, particularly this early in the process.) We will lease a facility that can be modified to meet the needs of a reduced enrollment count but also accommodate full enrollment, 450 students, through the use of additional lease space, parking lot available for portable classrooms, etc. In many ways we feel our target market will be receptive to our plan and will be patient with a short term facility knowing the bigger picture and the savings that will benefit their children in the long run. Again, we will lead with, and educate parents to, the wisdom of the "Education First, Building Second" philosophy.

### **Capital Fundraising Plan**

While we anticipate starting in a lease situation, we will still pursue, at our soonest opportunity, the financing for a developer-led custom facility. We understand that, given the risk that an unproven charter school is, the cost to the school of a developer-led facility is higher. We can mitigate the developer's risk and the higher costs to the school with significant private donations/investments. We have reason to believe that, given our very focused target population and their tight-knit community, we may have an opportunity to present our plan to organizations and individuals also committed to this same community. We have aligned helpers in the finance and non-profit worlds who will help us with a capital fundraising plan to:

1. Obtain donations and/or investments for construction costs that significantly reduce the developer's risk, and
2. Obtain donations that give us a large reserve account to cover facility-related costs if we open with less than full enrollment or have other unexpected costs,

If this fundraising strategy is successful we will then proceed with the developer-led model from the outset. Recognizing the benefits of opening in a custom facility we will pursue these donations and/or investments as soon as we are approved. Preparing for the real possibilities that would prevent us from successfully in obtaining these funds in a timely manner, we will simultaneously plan and prepare for our short term plan of leasing an existing building.

### **Long term plan**

Our long-term intention is for PHA to own the facility so we can take advantage of tax savings and other cost-saving benefits and have more control over the facility. After





stabilizing our enrollment count and proving our budgets for a couple of years, we will be in a much stronger position to build/buy an ideal facility.

Our initial research suggests that purchasing undeveloped ground and building a custom facility is our preferred approach. We expect to use the builder/developer-led model where an independent third-party (developer or builder) will obtain the construction financing and lease the facility to PHA with the plan for PHA to bond for and purchase the building as soon as we're able. We recognize that the financial markets make it very difficult to obtain construction financing for the project. We'd like to think that we will have an easier time obtaining financing because of the need for our school in the community but we will plan and work with the expectation that the money will cost more than we want and take longer to secure than we can afford. We intend to work closely with multiple sources of construction, equity, and investor financing so that we:

1. Keep everyone motivated to find the best possible terms knowing they have active competition.
2. Don't get stuck in a contractual relationship with a single builder/developer and be so heavily dependent on their ability to qualify for financing.
3. Can keep a pulse on the market environment. It's difficult, and nearly impossible, to know where the money will actually come from, and at what cost, we will wisely surround ourselves with multiple advisors to keep us very current.

Recognizing that construction financing is largely out of our control and not wanting to be too beholden to something we can't control, we will build lots of flexibility into our short-term lease.

The depressed real estate market offers a wide variety of parcels that could be purchased at reasonable prices and construction costs are very attractive. We have found several parcels within our target area and, given current market conditions, expect that many of these and many more will be available when we're ready to proceed. We anticipate being able to build our own facility at a cost comparable to adapting an existing building for use. Our discussions with contractors and developers have helped us realize that, once the construction financing is in place, we're better able to control costs and timelines with new construction as opposed to the inherent unknowns in renovating an existing building.

We have not entirely ruled out the possibility of renovation and modification of an existing building and have this as a contingency option if we're not able to find a suitable parcel of land. The depressed real estate market offers a wide variety of properties available at prices below their replacement costs. We have found several buildings in our target location that could be modified (and in some cases, expanded) to provide a high-quality and attractive learning environment. We have analyzed special-purpose (i.e. churches) and more generic commercial buildings.

### **FACILITY SPECS: SITE SELECTION**

No site has yet been secured though we have identified three sites that are quite ideally suited for our needs. The following criteria (in no particular order) have and will guide the facility selection process for PHA.

- Safe learning environment – The well-being of our students in an environment conducive to learning is one of our primary considerations. This will strongly influence our location, building design, and construction. This also ensures that we will meet all relevant building codes. A School Safety Plan will be developed and implemented prior to the school opening in the fall of 2012.
- Proximity – The target demographic for PHA is the west side of Salt Lake City. Our site will likely be in or near the Glendale and Rose Park areas and the diverse families from these neighborhoods. We desire to create a facility that will be widely used, not only as our 'Academy' for daytime school, but as a Family and Community Learning Center.
- Neighborhood – Our preference is to be near or on the edge of a residential neighborhood because this will make it possible for some students to walk to the school. We also like the atmosphere of a neighborhood better than that of a business park. We are working with city and neighborhood leaders to make sure we conform to present zoning and master plans for the future.
- Access – We will select a site that is in or very near our target neighborhoods and the area's major arterials and can easily be accessed from the regional transportation system including the UTA bus system for our older students and the TRAX system for teachers and staff who might travel from the north and south.



- Site – Ideal for us would be a 4-7 acre site, sufficient for a 30-40,000 square foot building, parking, and play and recreation areas including outbuildings. The site will have access to public utilities with sufficient capacity for our needs.
- Cost – We have budgeted \$455,000 annually for the facility lease with additional funds allocated for utilities, maintenance, and other related expenses. This represents approximately 19% of our total budget. The lease rate is calculated at a rate of \$13.00 per square foot on a 35,000 sq ft building. We have not budgeted additional funds for future renovation expenses and will negotiate these into the lease rate.
  - On a capitalized basis, the lease rate of \$455,000 per year provides an investor a very generous return on a \$5-6 million property. Anticipating our goal to keep the total cost of a building under \$5 million, we would be able to reduce our lease rates while still providing a healthy return on investment.

PHA will, upon approval, begin the development process or locate and secure an existing facility that meets our stated criteria. We will not enter into any leases, purchase contracts, or construction contracts without first submitting them to the State Charter School Board for consideration and advice. Our plan to purchase land and build a new facility is backed by a contingency plan to lease or purchase an existing building and contract to make the necessary changes and additions to accommodate our needs. We would rather be in a short-term lease situation while waiting for optimal financing to build our ideal facility than lock ourselves into a long-term situation on a less than ideal facility.

### **FACILITY SPECS: BUILDING**

Our preliminary research suggests that a building of approximately 35-40,000 square feet is sufficient to meet our needs. We have used as a template, other school facility designs that have been successful and have made minor adaptations as needed to fit our teaching methods, target population, school mission and other outreach and community goals.

Our first and great design priority is for open learning spaces which will serve as classrooms. We will need approximately 20 rooms to accommodate 18 K-8th classes plus Special Education needs. These rooms will be open and spacious to accommodate tables, stools, chairs, and other furniture in a variety of arrangements supportive of the

active pedagogy PHA is committed to. Ideally, these rooms will share utility features such as sinks, storage cupboards, restrooms, fountains, prep areas, etc. We desire a configuration that will allow class groups to combine frequently in shared activities and collaborative learning. Faculty teaching teams will also benefit from the arrangement of classroom space so that coordination, preparation, and responsibilities can be easily negotiated in a convenient ‘village’ setting.

Classes are organized by two-grade clusters in ‘pods’ or community areas that we will call ‘villages’. Grades within each village all participate in a common ‘learning expedition’ or thematic unit of study with high collaboration between teachers and many shared activities and events. Because we believe that learning is, in large part, a social process and has an important social function, our goal is to create opportunities for multi-grade and multi-age learning communities—so that students across grade levels can learn together and influence each other for maximum learning and social outcomes.



This sample floor plan expresses these ideas and illustrates how grade-level classrooms (tan) are easily combined by moveable walls and grouped together. The open commons areas (green) which function as a shared community gathering space for learning, presentations, meetings, guest presenters and other shared activities.

**FACILITY SPECS: VISION-RELATED COMPONENTS**

We are also anticipating other areas of need in the overall space plan in the facility and have begun to think through ways to incorporate vision-related components of the facility. Our school facility will consist of ideals which, in many cases, will involve or even be created through student and classroom projects. Creating final products

throughout the school and in the community is the essence of our project-based learning model and the vehicle through which our students will learn much of their curriculum. A facility that is adequate and complete, but that can act as a 'blank slate' for student-centered learning projects, is a priority to us. This not only helps us accomplish our mission and be true to our instructional methodologies but also creates authentic opportunities for students to develop a sense of ownership and investment in our facilities.

*An asterisk marks those ideas that have potential to be curriculum-based projects created and maintained by students.*

### Classroom Learning Spaces

- Vinyl lettering on the wall (Famous quotes of western civilization, ancient Polynesian proverbs)\*
- Recycling bins\*
- Large tables and chairs on wheels to allow for group work and projects
- Inside and outside thermometers on windows
- Windows and Mirrors on the wall
- Traditional woven floor mats with Polynesian designs
- Storage room with lots of cupboards easy for student access
- Giant geo-board
- Model of a coconut in developmental stages\*
- Ferns and tropical plants
- Giant wall maps of all continents, expanded maps of the Pacific region
- Picture Galleries: U.S. presidents, world leaders, and Pacific pioneers\*
- Large surface areas for displaying student work
- Giant world floor map\*
- U.S. and international country flags\*
- Dictionary wall of math definitions and scientific formulas\*
- Picture Galleries of famous men and women mathematicians, scientist, inventors, authors, artists\*
- Picture Galleries of US immigrants and pioneers from other lands\*

### Playground

- Accessible swings and slides
- Coconut tree-climbing apparatus (similar to climbing wall)\*
- Recycled wood chips from coconut husks\*
- Ball wall, Four-square, basketball hoops
- Giant tan grams and world maps on playground floor\*
- Student and Family Community garden\*

- Sandy 'Beach' with paved area for water fountain/spouts\*
- Benches and hammocks\*
- Shade trees and Stone walking paths\*
- Sand volleyball court

#### Community Areas

- Tropical landscaping and shade trees with seating areas\*
- Rainwater collection system\*
- Koi pond with waterfall\*
- School Tropical Green house for growing orchids/plumeria and taro\*
- Many indoor plants\*
- Outdoor landscaping (tropical designs but low maintenance)\*
- Pavers with Polynesian design patterns\*
- Classical and World folk music listening stations\*
- Student piano, ukuleles, microphones for impromptu performing\*
- Multi language room and item labels\*
- Famous and Polynesian folk paintings and crafts\*
- Salt Water Aquarium\*
- Touch Ponds with sand and live ocean animals such as starfish and sea cucumber and rays\*
- Tropical Vivarium with live Dart Frogs\*
- Famous quotes on walls\*
- Glow-in-the-dark Constellations on the ceiling demonstrating how stars were used as tools of the ancient voyagers who practiced pre-history way-finding and navigation\*
- Interactive bulletin boards\*
- Clocks showing time in different time zones\*
- Sculptures, Sundial, Scale model of the planets\*

#### Physical Education and Gymnasium Areas

- Locker room has private cubicles with lockers
- Wheel chair accessible cubicles

#### Library/Media/ Reading/Study Areas

- Large group floor space with traditional woven mats with Polynesian designs
- Comfortable Individual reading spaces
- Chair configurations and tables for laptops
- Computer area with wireless stations or group tables
- Museum-quality presentation cases for student and world folk art\*

- Large group reading and performance areas for oral storytelling and book read-alouds as well as performers and guests
- Small group area with tables for map reading and projects
- Multimedia equipment storage area

### **FACILITY SPECS: ACCESSIBILITY**

The PHA facility meets or exceeds ADA recommendations for building and playground accessibility. In addition to basic recommendations such as Braille signs, wide hallways, and automatic doors, the PHA facility includes other standard designs to assist students and visitors with disabilities. This is particularly important for our facility as we anticipate wide use of the building and grounds as a Family and Community Learning Center. The library media center features numerous accommodative devices for students and visitors with disabilities. At least 50% of playground equipment is accessible.

PHA classrooms feature a variety of desk, chair, and table heights which can be modified for many activities and uses. In addition, desk free zones allow students of all abilities to participate in both group and individual activities. All restrooms and drinking fountains located within classrooms are wheelchair accessible. Natural lighting is emphasized and the school design avoids the use of transparent dividers, step-down areas, hazards and blocks in pathways, and other line dividers that are difficult for the visually impaired to navigate. All classrooms and community gathering areas are equipped with adequate audiovisual equipment and have shared mobile computer labs. (See Section: Technology Plan)

Special education students are served consistent with their IEP, which includes placement in the Least Restrictive Environment (LRD). This may include the regular classroom, separate classroom, or other placements along a continuum. Additionally, there are rooms for therapy services, self-contained classrooms, secure records rooms and adequate toileting facilities. The lunchroom, auditorium, and stage have easy access for wheelchairs and walkers. The school building has a single main entrance for student safety but provides additional accessible exits for safe evacuation during emergencies.

## EXAMPLES OF VIABLE OPTIONS

PHA Founders have evaluated many existing buildings and vacant parcels against our criteria. We have considered a wide variety of property types including special use buildings (i.e. churches), generic office, retail, or warehouse buildings, and vacant parcels.

We have chosen two properties to present here in order to demonstrate our ability to analyze a wide variety of properties against our criteria and to create the best solution for our needs. We are committed to creating an “ideal” facility and will do so with a keen eye on the wise and efficient use of our financial resources.

### **Proposed Site #1 – Existing Building (Lease, with Option to Purchase)**

Address:	1945 So. Redwood Rd, Salt Lake City
Previous use:	Oasis Vineyard Church
Access:	Excellent (near interchange of Redwood Rd and 201)
Parcel size:	3.42 acres along commercial corridor (backs to golf course)
Building type:	Special-purpose (formerly Vineyard Oasis Church)
Building size:	Approximately 18,600 sq ft

This special use building has been on the market for more than a year and the listing price reflects the land value. In our search, we felt that this building ranked high in its ability to be modified and expanded to fit our needs on an “as needed” basis. The existing building has a large auditorium space, several classrooms, administrative offices, and other features that will meet our needs with little or no changes. We could use portable classrooms in the parking lot to fill needs as we grow and stabilize our student count. This option would give us flexibility and time to get in a stronger position to secure construction financing for a permanent expansion. We would prioritize an update to the façade of the building with a fresh and attractive design fronting Redwood Road. Backing the Glendale golf course, with a hotel to one side and a lively auto business to the other, the site is attractive with a campus feel to it. We will likely utilize the existing tennis courts and playground and may convert some of the parking area into a grass field. There will still be more than sufficient parking on site.

We would seek a lease with option to purchase on this building. We would negotiate any initial repairs in the lease. Starting on a lease basis with the use of portable classrooms would give us time to stabilize our student count and prove our operating model. The building is listed for sale “as is” at a price of \$1.8 million. All of the

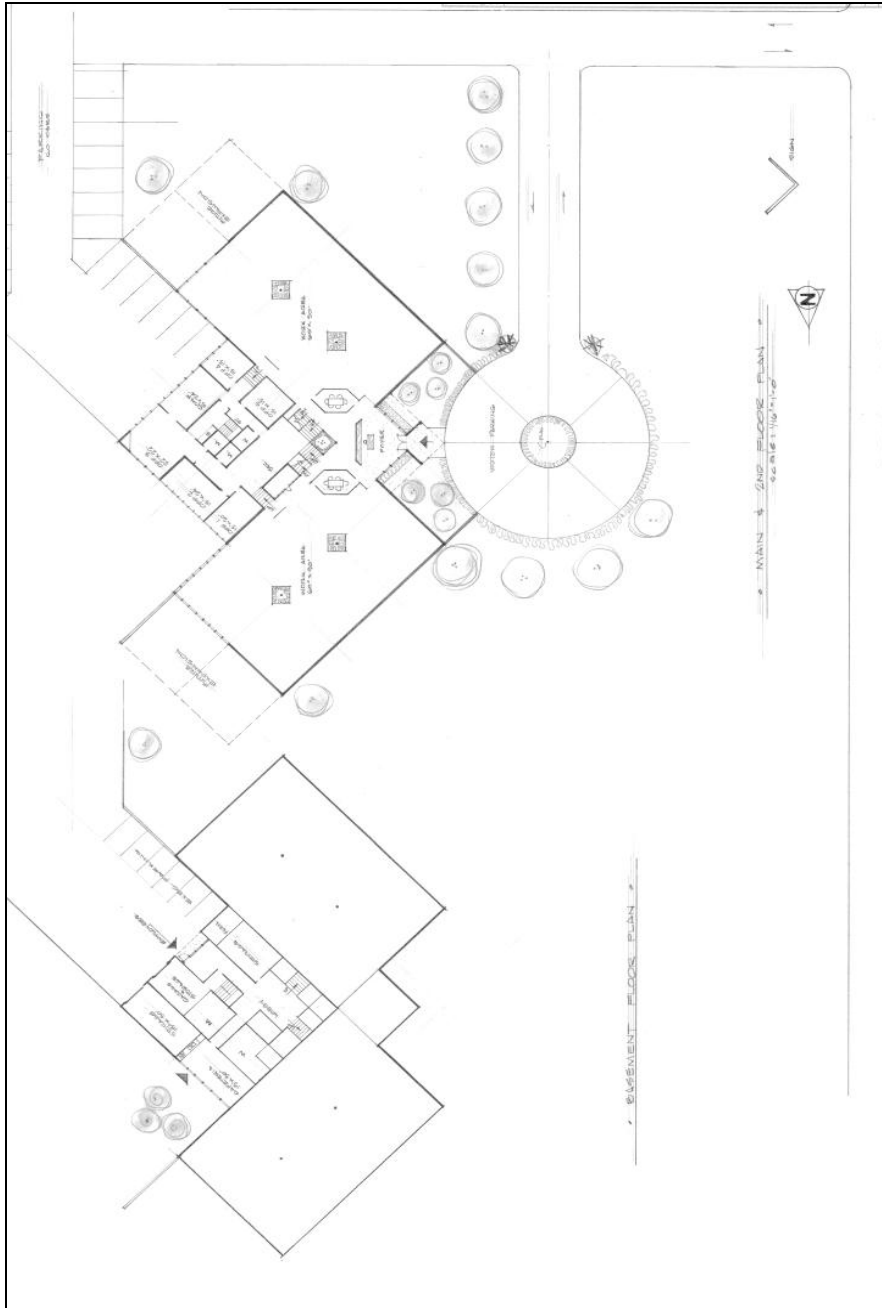


renovations and additions have been forecasted to cost \$3.3 million for a total cost around \$5.1 million for the property. The one big unknown is the structural design of the building and whether it would need significant upgrades to meet current seismic codes.





## Original Plans

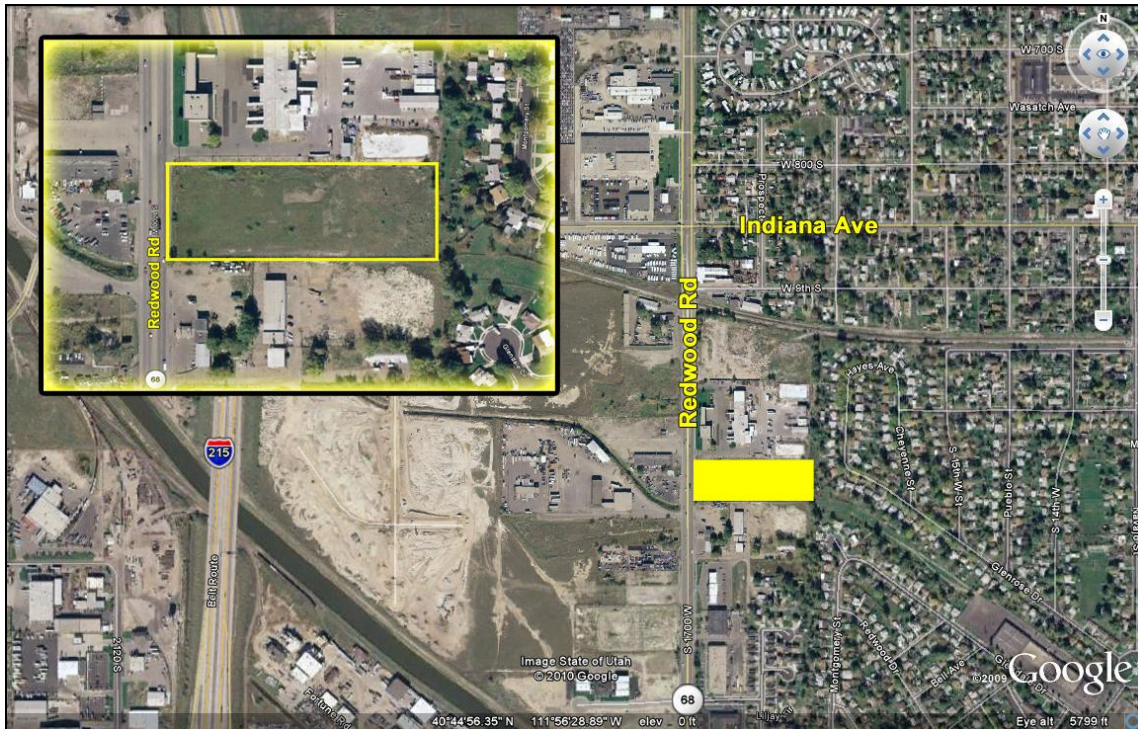


## Proposed Site #2 – 999 So. Redwood Rd, Salt Lake City

Access: Good (from freeways and surrounding neighborhoods)  
Parcel size: 5.29 acres along commercial corridor

This parcel would provide an excellent location for PHA to build a custom school facility. The property fronts on Redwood Road providing visibility and easy access. The back portion of the property abuts a residential neighborhood and would be a nice area for fields and play areas.

The parcel is listed for sale at a price of \$1.9 million which appears to be high for commercial frontage on this portion of Redwood Road. We don't need Redwood Road frontage and hesitate paying the premium for that feature.



### CONTINGENCY PLAN: SHORT-TERM LEASE

Our “education first, building second” approach means we will likely be implementing our contingency plan of leasing an existing building on a short term basis. The current



real estate environment is such that more prospective properties are being listed for sale than are being leased.

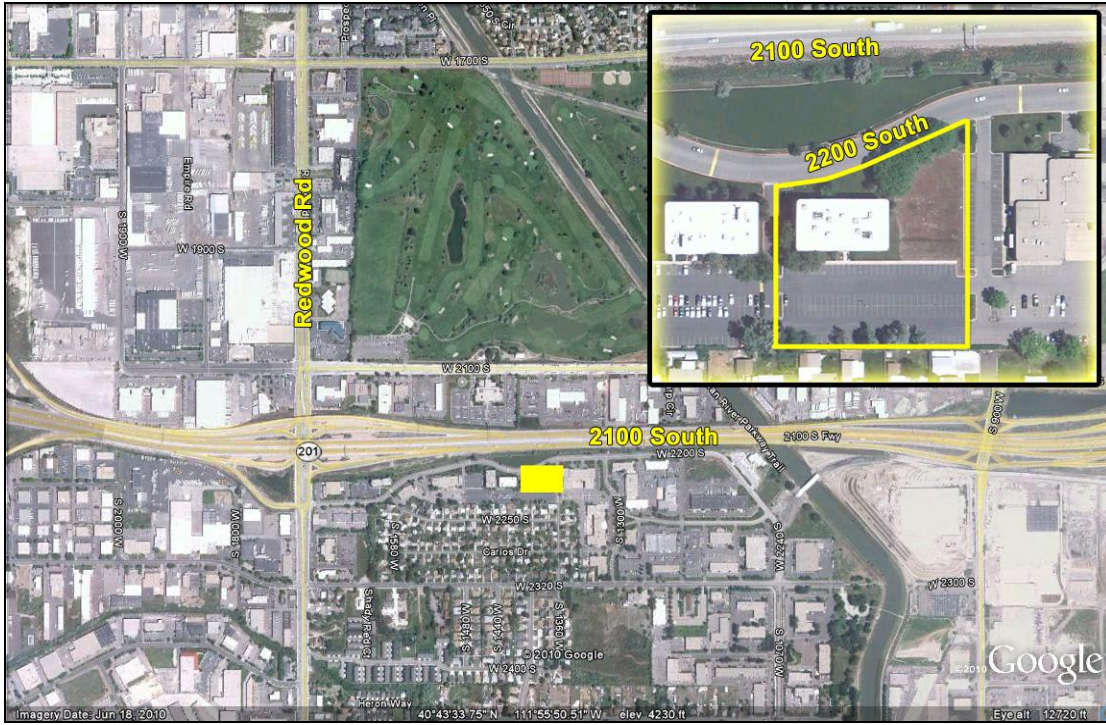
If needed, we will enter into a temporary lease situation in an existing building that would require little or no modification. Vacant office or retail buildings would be suitable to carry out the core functions of the school though they would lack the full complement of amenities that we need. Portable classrooms could also be used and we will lease a building with sufficient parking to accommodate them.

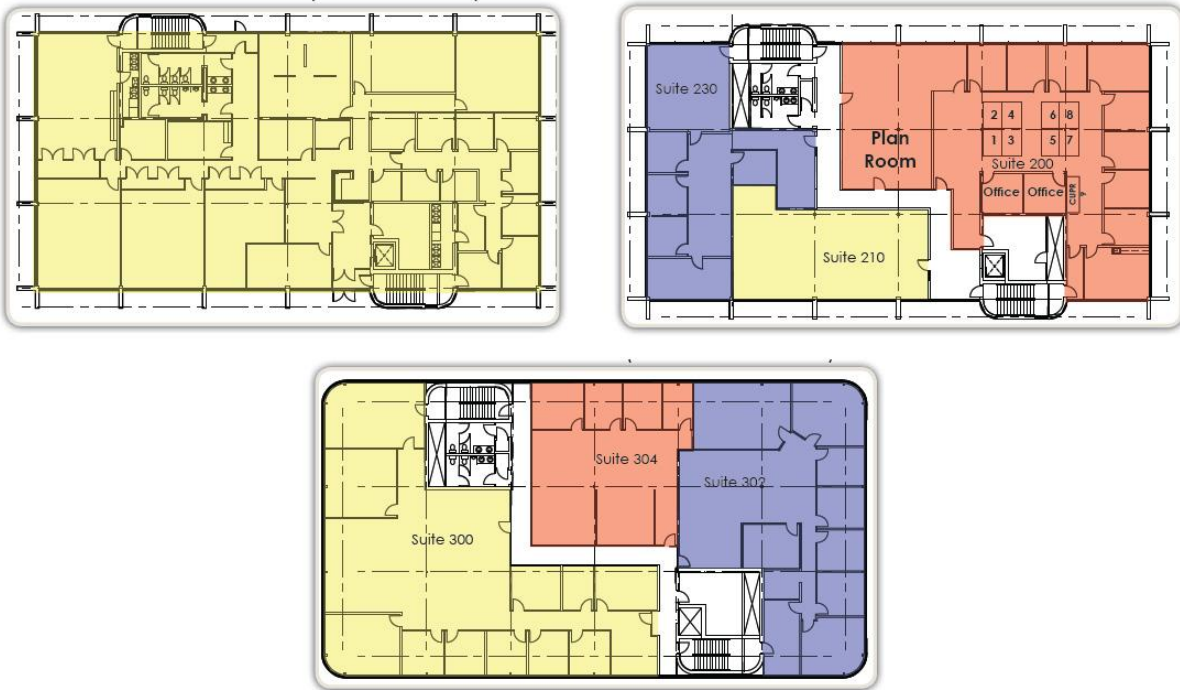
We will also look outside our west-side target area for ready-use buildings to fit our needs on a temporary basis but will only use this option if transportation for our students is not a major hindrance. While not ideal scenarios, we have planned for this contingency and will begin implementing the plan if we start falling behind our schedule.

### **Example of Possible Existing Building**

Address:	1385 West 2200 South, Salt Lake City
Previous use:	Office building
Access:	Decent
Building size:	31,600 sq ft

This is a fairly generic 3-story office building that is currently vacant. (We don't expect this particular building will be available if we need it in 2012 but are confident other similar buildings in the area will be available.) This building will require some interior walls to be moved to create classrooms but the core elements are already in place. There is plenty of vacant land and parking to accommodate portable classrooms and outdoor amenities. Landlords regularly make some tenant improvements as part of a new lease and we will have them pay for the needed adjustments. That may increase our lease rate but it gets us in a building without having to qualify for construction financing.





## *DEVELOPMENT OF THE LONG TERM FACILITY*

We will likely hire a professional developer to finance and construct the initial development of the facility (using the required procurement process). Our research has shown that other charter schools have found success when using a developer who is able to competently secure the debt and equity financing and manage the construction process. We have not yet entered into any contractual relationship nor have we decided informally who we will have develop our facility. We have visited with multiple companies and construction firms who are in this business and we intend to visit with more and check references, etc. for all of them. We will continue this process during the application revision process and more formally approach a decision as we get closer to final approval.

In compliance with USOE guidelines, we will also contract with someone to be a project manager or Building Officer who will represent our interests in this development process. This individual or firm will be coordinating and overseeing the work of the developer, contractor, or financing and will not have any conflicts of interest with them. We are confident we can find someone with extensive experience in commercial and/or charter school development to make sure our goals, vision, and interests are secured.



Again, we have identified and begun talking with a number of qualified individuals but will not formally approach a decision until we are closer to the final approval.

We will lean heavily on the professional developer and our project manager to secure the necessary entitlements and approvals through the appropriate USOE processes and offices and Salt Lake City or other municipality. Our real estate broker has already evaluated our potential sites against the zoning maps and codes so that we know what approval processes will be required for each site.

We will seek capital donations and explore capable investors from within the Pacific Islander community to offer a chance to become partners-in-effect, after which we will look to the wider investor community. Our real estate and financial professionals will prepare an investment package explaining the investment opportunity. We are confident that sufficient investment capital can be obtained as we offer advantageous investment terms and a clear vision with strong execution of our charter school plan. We understand that financing is much easier to obtain at a significantly lower cost after we've proven our charter school for a couple of years. We'll be able to stabilize our enrollment count and budgets, significantly reducing the developer risk and our own costs.

### **PURCHASE AND FINANCING OF THE FACILITY**

Our long-term intention is for PHA to own the facility so we can take advantage of tax savings and other benefits. Current market conditions are such that the best rates can be obtained after we can show at least 3 years of successful operation and qualify for investment-grade status. It's difficult to project where the bond market will be at that time and we've been told to project a rate of 6.5-7.0% on a fully amortized 30-year loan. At a loan-to-value of 100% plus points and fees, we will be able to buy out the developer and investors and become sole owners of the facility.

Depending on our location and other options available at the time for inner-city areas and schools serving underprivileged populations, we may be able to qualify for more attractive bond financing programs or incentives. We will work closely with individuals and firms who monitor these bond markets and programs to find the optimal financing whenever it's available.



## SCHEDULE

We have “front loaded” our schedule to minimize the possibility of rushed decisions and delays as we approach our fall 2012 opening. We are already planning with care the solicitation of investors and ready to explore financing. We hope to have those in place prior to our charter approval in late 2010. The front end of our schedule is fairly aggressive so we can absorb any delays and problems on the back end. For instance, we can accommodate more than 12 months for construction but have been told we’ll only need 9 months for a custom building and 6-9 months for a significant renovation.

Timeframe	Task	Resources
Summer/Fall 2010	Seek investors Apply for loans	Real estate professionals SBA, local institutions
Fall 2010/Winter 2011	Charter approval Seek investors Identify facilities Apply for loans	Community investors Real estate professional SBA, local institutions
Winter/Spring 2011	Select site/building Plan construction	Real estate professional Architect & contractor
Spring 2011	Secure financing Lease agreement finalized	SBA, local institutions Real estate professional
Summer 2011	Zoning & building permits Begin construction Marketing & open houses	Architect & contractor Contractor Families & community
Fall 2011	Construction Marketing & open houses	Contractor Families & community
Winter 2012	Construction Marketing & open houses	Contractor Families & community
Spring 2012	Construction completed Marketing & open houses	Contractor Families & community
Summer 2012	Marketing & open houses Furniture & fixtures Final preparations	Families & community Families & community Faculty & staff
Fall 2012	Pacific Heritage Academy Opens in Salt Lake City	



## *FACILITY MAINTENANCE*

We intend to use professionals to maintain the facilities on a contract basis. However, we also value and will strongly support the involvement of our students and school community in those operational, maintenance, repair, and security tasks that do not require specialized skills. These will be done as a joint effort between faculty and staff, students, and families as part of our core philosophy and building a strong school culture and tradition. Every person involved in the school will have some level of responsibility for making sure the facility remains safe and operational and that the financial investment of public funds is appreciated and respected.

As stated, operations, maintenance, repair, and other tasks that require specialized skills and/or licensed professionals will be contracted to professional firms according to state procurement policies.

## SECTION 7

# DETAILED BUSINESS PLAN

The following Detailed Business Plan specifies the vision of Pacific Heritage Academy [PHA] founders in the area of finance operations and maintenance. It includes costs associated with our likely instructional model called Expeditionary Learning (a project-based model that will blend well with our social and cultural studies priority), with its rigorous professional development component and also details particular ways in which our resources will be used to accomplish our mission to reach Pacific Islanders in the west Salt Lake City area.

### *Allocating Resources to the Mission*

Detailed here are the specific and concentrated ways in which our resources will reflect our priorities and be used to accomplish our mission. We value and are grateful for the funding sources available to implement our charter plan and realize we are stewards of the public trust and accountable for the wise and prudent use of funds.

### **Mission & Vision of the School**

At Pacific Heritage Academy, we use the power of education, the endurance of language and culture and the virtue of relationships to help young people on voyages of discovery to find out who they are and what they can become. We give them Roots and Wings. Using a best-practice model such as Expeditionary Learning, the vision of Pacific Heritage Academy is to reach out to children of Pacific Heritage and give them both roots, an understanding of their native language and culture, and wings, an understanding and love of American and World cultures, so that they will develop



those ideas and competencies needed to achieve their dreams in a global 21st century community. Using the "Aloha Spirit" we will create an environment where our target group and their friends and neighbors of all races, religions and cultures will feel welcome and will benefit from our unique educational program. This section demonstrates how budget figures have been allocated appropriately to support this powerful and important mission.

### **School Size**

The student enrollment at Pacific Heritage Academy will be limited to 450. Although there appears to be enough community support to make a larger school viable, we have conscientiously decided to keep the school population small, as we value the attributes of a small school where students and adults are able to know each other well and to benefit from the intimacy only found in smaller. PHA's target class size is 25 children per class.

### **Expeditionary Learning and our Professional Development Priority**

At Pacific Heritage Academy, stimulating and challenging instruction will be given in math, science, reading, social studies and writing through an innovative and integrated curriculum through long term, real world learning units. This interdisciplinary curriculum will be aligned with the Salt Lake School District and the state of Utah standards. Pacific Heritage Academy anticipates a supportive relationship with organizations such as Expeditionary Learning Schools (ELS), a national, non-profit organization, which provide an effective model and professional development opportunities in many forms.

In preparation for the opening of the school, Pacific Heritage Academy has explored signing a Professional Development Contract (see sample MOU) with Expeditionary Learning Schools. Throughout this application we project a similar contract with a support organization such as ELS but if needed will find similar assistance through another organizations. For example, the Foxfire Approach to Teaching and Learning. This is a method of classroom instruction—not a step-by-step checklist, but an overarching approach that incorporates many of the core practices we find in the EL model.

Regardless of the model, Pacific Heritage Academy's faculty and staff will receive regular and on-going professional development training, specifically when school is dismissed early on Fridays (including end of quarters). Additionally, Expeditionary Learning and Foxfire also offer local workshops, regional trainings and national conferences each year. To ensure that teachers and administrators are fully trained to implement the vision and mission of Pacific Heritage Academy using one of our researched teaching models, \$16, 000 will be allocated from the budget for this essential



purpose during our planning year followed by \$60,000 during our first operational year and \$50,000 for the second operational year.

As part of a professional development services contract, Pacific Heritage Academy will seek the professional services of an experienced project-based learning consultant who will provide not less than 25 days of on-site trainings, mentoring, and other forms of professional development each academic year in addition to the trainings between school sessions. Examples of teacher trainings include assessment, climate, culture, and unit lesson or 'expedition' planning. In addition, large blocks of time are regularly set aside for teacher teams to be developing or refining the learning experiences designed for their students. Pacific Heritage Academy also plans to collaborate with other Utah schools that use similar instructional practices and therefore can benefit from many shared training expenses and practical experiences.

### **Expeditionary Learning Methodology: Expeditions and Authentic Learning**

In a traditional classroom setting, textbooks are the main way to gain knowledge and understanding of a particular subject. Using Expeditionary Learning or other reform models requires that we use resources differently so that funds that might have traditionally gone towards textbooks, would be used to provide more differentiated and authentic opportunities to learn for example, replacing texts with primary source documents and authentic materials and supplies (i.e. real maps instead of a textbook with a map) from which to study as well as unique hands-on, real-life experiences for our students. Original sources and other books and resources we will use include professional journals, anchor texts, literature sets, maps, etc. In addition, resources will also be spent on extending classroom lessons into the real world, for example costs for field work, technology, materials, equipment and other supplies to make learning real and authentic. To cover these costs of implementing our project-based, interdisciplinary model of learning the state core curriculum, \$50,000.00 has been set aside in the budget.

### **Target Population: Reaching Pacific Islanders**

As our Market Analysis and Target Population sections show (see Section 3 and Section 5), Salt Lake City, specifically the Westside areas of Glendale and Rose Park, hold a large number of Pacific Islanders who have educational options available to them through the Salt Lake City School District. Pacific Islanders are considered an at-risk group of students, however, data show that among minority students and compared to white students, Pacific Islanders do quite well. Our goal is to continue to improve student learning for this group and to affect the families of these students by providing a unique opportunity for parents to be highly involved in the education of their children. Our plan for parent and family involvement is developed using a research-



based model that will ensure we reach our target market and see our intended outcomes. For all students and their families we provide valuable academic and life experiences through our educational program and the building of relationships within an approachable community of learners. We strive to be a community leader in creating an educational institution which will model high standards, commitment to learning, and tolerance within this specified Salt Lake City community.

### **Financial Plan**

Our budget on the following pages reflects realities as we forward marketing and publicity plans within the community in order to effectively reach this target group with our offerings.



## Start-up Budget

<b>Charter School Name: Pacific Heritage Academy Charter School</b>			
<b>Planning Year</b>	<b>Enrollment Maximum or Target</b>		
	<b>Planning Year</b>		
Number of Students:	<b>450</b>		
Grade Distribution:	<b>K - 8th</b>		
<b>Revenue</b>	<b>Total</b>		
Local Funding including anticipated fees from students			
Fee Basis if applicable:			
State Funding			
Private Grants & Donations	-		
Source: Fundraising Committee			
Loans:			
Commercial			
Private			
Other (specify): USDA Lunch Pprogram			
Other (specify): NCLB Title Funds			
Other (specify): State Revolving Loan Program or Private Bridge Loan	175,000		
<b>Total Revenue</b>	175,000		
<b>Expenses</b>	<b># of Staff</b>	<b>@ Salary</b>	<b>Total</b>
Salaries (100)			
Director or Principal (on contract)			30,000
Employee Benefits (200)			
Purchased Professional Services(300)			
Professional Employee Training and Development (330)			16,000
(including EL, Site Visits & other Curricular Support)			
Official or Administrative Services in Support of Management (310)			5,000
Purchased Property Services(400)			
Other Purchased Services (500)			
Travel (580)			8,000
Supplies(600)			
Instructional and other general supplies (610)			2,000
Library Instructional Aids/Books/Periodicals(640/645)			10,000
Textbooks (641)			20,000
Software (670)			5,000
<b>Total Instruction, Administration &amp; Support</b>		-	96,000



<b>Operations &amp; Maintenance</b>			<b>Total</b>
Purchased Property Services(400)			
Other Purchased Services (500)			
Advertising and Marketing (including Meeting Halls)			4,000
Supplies (600)			
Property (700)			
Technology-Related Hardware (Computers etc)			15,000
Furniture & Other Equipment (Kitchen 11k & Classrooms 40k)			51,000
Debt Service and Miscellaneous Costs (800)			
<b>Total Operations &amp; Maintenance</b>			70,000
<b>Total Expenditures</b>			166,000
<b>Total Revenues</b>			175,000
			<b>Balance</b>
<b>Budget Balance (Revenues-Expenditures)</b>			9,000
<b>Budget Balance as Percentage of Expected Revenues</b>			5.14%

### Planning Year Budget Narratives

Pacific Heritage Academy’s budget will exhibit their aggressiveness and ability to manage school finances cost effectively and economically, based on funds obtained from a Charter School Revolving Loan, **without grants and donations**. Pacific Heritage Academy anticipates it will qualify for Title I Funding due to its target population and receive public and private grants and donations. The planning year and operational years 1 and 2 reflect only the funds from the Charter School Revolving Loan. Detailed here are narrative explanations of the **planning year budget** and some comments about the operational years. These narratives explain our allocation priorities.

### REVENUES

*Donations and Start-up Grants:* Pacific Heritage Academy will NOT rely nor become dependent on donations and Start-up Grants.

*Charter School Revolving Loan:* Pacific Heritage Academy will apply for the Charter School Revolving Loan to cover necessary start up costs of the school. Pacific Heritage Academy will apply for a loan of \$175,000, the total expenditures budget for the planning year, with an ideal low interest rate (<2%). A private bridge loan may be arranged to cover the months between start up and actual receipt of revolving loan funds





## EXPENDITURES

### Salaries (100)

*Director or Principal (on contract):* Pacific Heritage Schools Board of Trustees will hire the School Director as of December 31, 2011 of the planning year, prior to the opening of the school in September 2012. The Director's contracted sum, considered a part-time consultant and paid as such, for the six months preceding the first year of operations will be \$30,000. Teachers, other administrative and staff salaries and salary increases are shown in the budget for operational years 1 and 2.

### Purchased Professional Services (330)

*Professional Employee Training and Development (330) & Office or Administrative Services in Support of Management (310):* We are considering a contract with Expeditionary Learning Schools (ELS) which delivers a strong professional development focus to educators. An example of a Memorandum of Understanding (MOU) is presented here and covers a planning year of a partnership between Pacific Heritage Academy and Expeditionary Learning Schools. (See Section 20, Administrative Services for a copy of the MOU). During this period, ELS would propose to provide a package of services to faculty and school leaders to foster the full implementation of the ELS school reform design. Although other organizations offer some of the same training opportunities and services, Expeditionary Learning is the leader in providing a comprehensive training program. We have therefore used them as an example of a full and robust professional development plan with the associated cost of such a program. Careful to follow procurement guidelines, however, we have not signed any contracts with them and are prepared with alternatives to using them exclusively.

Professional Employee Training and Development will include costs for an Expeditionary Learning contract and any other curricular support needed. The budget allots \$16,000 for the planning year for this expense and \$60,000 and \$50,000 in the following 2 years respectively.

### Travel (580)

Pacific Heritage Academy faculty will attend trainings such as Expeditionary Learning Local Workshops, Regional Summits and National Conferences as part of their Professional Development. \$8,000 for the planning year has been set aside for travel expenses for the Director, faculty, staff and board. Years to follow allow \$10,000 each year.



#### Supplies (600, 610, 640, 641, 645, 670)

*Instructional and other General Supplies (610) & Library Instructional Aids/Books/Periodicals (640/645):* Our teaching and learning methodology requires that Pacific Heritage Academy not be limited to textbooks but look for creative alternatives to these.

Students will have access to a wide variety of sources for reading and learning. Pacific Heritage Academy anticipates donations of books, software, library materials and supplies and will purchase these items using the funds allotted in the amount of start-up budget with \$2,000 for Instructional and other general supplies and \$10,000 for Library Instructional Aids/Books/Periodicals.

*Textbooks (641):* Our teaching and learning methodology encourages students to focus more on real-life, project-based, experiential and innovative projects and real research. For this purpose, less of the budget is dedicated to textbooks than in other traditional school designs. \$20,000 will be allocated to purchase language arts and math curriculum textbooks from the start-up budget. Another \$20,000 is budgeted for each operational year 1 and 2.

*Software (670):* Included in this start-up budget of \$5,000 is the cost for a federal school lunch program and associated training such as Nutrikids, and MS Office licenses (Publisher, PowerPoint, Excel, Word), key programs needed for students project-based learning and for administrative and staff use.

#### Other Purchased Services (500)

*Advertising and Marketing (including Meeting Halls):* Pacific Heritage Academy will spend up to \$4,000 in the planning year for advertising and marketing such as flyers, pamphlets and signage, to inform the community about Pacific Heritage Academy. This expenditure will also cover meeting halls, fair booths, and other equipment needed for promoting the school.

#### Property (700)

*Technology-Related Hardware:* Pacific Heritage Academy recognizes and values the use of technology in everyday administration of our organization (i.e.-student database, communication with families, lunch program), providing library and media services (cataloging of materials, use of computers for research, writing, communicating), and in criterion-based testing and ongoing student assessment. Additionally, Pacific Heritage Academy aims to integrate technology into the curriculum so that students are being exposed to authentic uses for learning. Based on the shared vision of educators,



parents, community members, and consultants who have technological expertise, our technology plan also specifies how items will be paid for and how its use will be supported. Effective planning for equipment will be short-term. Technology is changing so quickly that it is impossible to know what advances will be available in five years. Our plan will be reviewed each year during the budget process to make sure the school is purchasing the most current equipment and to take advantage of new and lower cost technology. Technology is an ongoing investment and therefore should be considered a regular expense, not a one-time purchase and will be reviewed each year during the budget process to make sure the school is purchasing the most current equipment and to take advantage of new and lower cost technology. Pacific Heritage Academy's basic infrastructure will include:

**Classrooms:** Each classroom community will have one desktop computer and 1 phone. Desktop computers are primarily teacher workstations. Laptop computers on technology carts will be used by students.

**Community Learning Areas:** Classrooms will be grouped physically in multi-age, multi-grade communities (i.e.- K-2, 3-5, 6-8) and share a common area for community gatherings and learning times. These areas will each be supplied with 1 multi-function copy machine, 1 60-inch LCD TV (laptops will be used as DVD players), 1 projector, and 1 Laptop Storage (LSC)/Technology Cart which will carry 24 Dell laptops and 1 wireless printer on each cart. Dell has been chosen for having an ideal warranty and quality customer service. Each of the 3 mobile carts will serve 6 classrooms with 24 students each. The expenses for these mobile carts, laptops and other computer hardware and technology devices will be expanded over three years beginning with a budget of \$15,000 for the planning year budget, \$35,000 for operational year one, followed by \$15,000 for operational year two (see Section 8, Operating Budgets and Section 22, Technology Plan).

**Learner Support Office:** Each of our Community Learning Areas include a private office/classroom called a Learner Support Office. These 3 offices contain teaching aids, resources, supplies, and 1 desk-top computer with any assistive/adaptive devices or special needs equipment. This area serves as a space for students with special needs, as a teacher prep area, and for small learning groups, meetings, and student assessment.

**Our Front Office or School Administrative Area:** Will contain the central phone system, 1 leased Multi-Purpose Machine (copy/scanner/printer), 1 desktop computer for school operations/secretary, and 3 laptops with docking stations for administrative personnel.



Pacific Heritage Academy will ensure funding for infrastructural purposes of \$15,000 in the planning year, followed by \$35,000 for operational year 1 and \$15,000 for operational year 2. The average cost per laptop is \$450 and \$500 per desktop.

*Furniture & Other Equipment:* Pacific Heritage Academy will allocate \$51,000 in its planning year budget, followed by \$20,000 for operational year 1 and \$5,000 for operational year 2 for kitchen and classroom equipment, which includes teacher desks, tables, chairs, etc. In the planning year, \$40,000 will be used for classrooms and \$11,000 for the kitchen supplies.

#### Cash Reserves

Note that our budget allows for a 5% minimum cash reserve in the planning year, operational years one and two at maximum enrollment, and at 75% of enrollment.

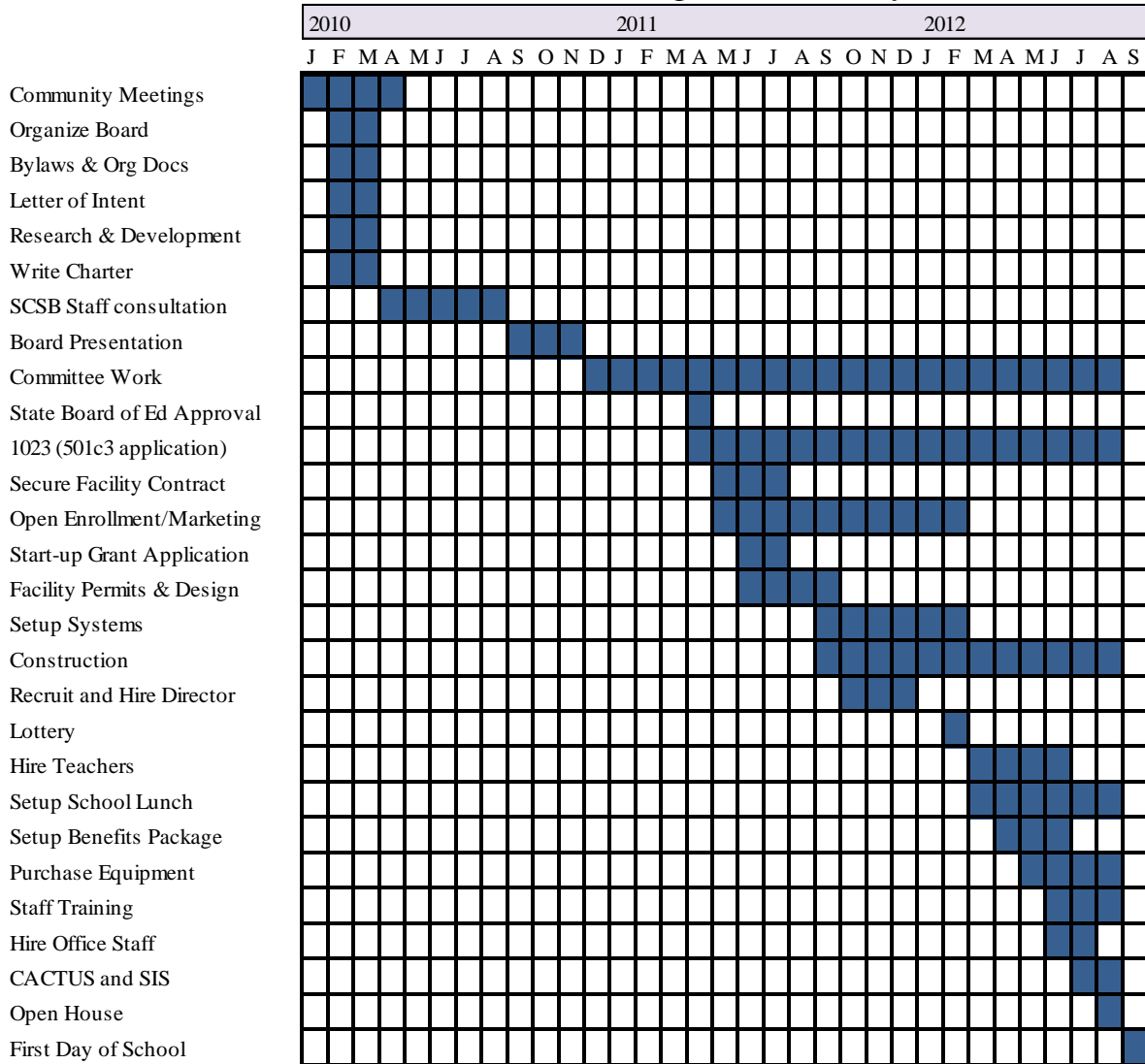
### **Start-up Plan**

Our start-up plan is aggressive and motivated by factors that affect acquiring our facility, recruiting our target population, and identifying skilled staff to implement our instructional model. We address here the time line for our action plan and have anticipated issues and made provisions for them as we move forward steadily upon approval.

#### **Timeline**



# Pacific Heritage Academy Timeline



## Timeline Narrative

Pacific Heritage Academy will provide a comprehensive and rigorous public education through Expeditionary Learning methods of teaching. Outlined below are the steps for the successful inauguration of Pacific Heritage Academy. The governing board and founding members are prepared to tackle the rigorous timeline that opening a charter school requires. A plan of action for each milestone accompanies the timeline.

*Year 2010*



From September 2009 until April 2010, public community meetings were held to inform the public of Pacific Heritage Academy's purpose. In February and March 2010, the Governing board, made up of founding members, completed the following:

- Formed the governing board.
- Bylaws, Articles of Incorporation (Organization Documents), and Letter of Intent were written and submitted.
- Develop a charter business plan, policies and procedures.
- Develop a budget for the planning and operational years.
- Research, write and submit Pacific Heritage Academy charter application.
- Pacific Heritage Academy will be prepared to meet with the staff of Utah State Charter Schools Board [SCSB] to review the application for improvements, submit revised application and subsequently receive approval. Between September and October 2010, Pacific Heritage Academy will formally present at a SCSB meeting.

#### *Year 2011*

- After formal presentation to the SCSB, charter school applicants will be recommended to the USBOE. Approval from the SBOE will be communicated no later than April of 2011.
- Committee work will continue from December 2010 throughout the entire 2011 year.
- Complete, submit, and begin the review process for the IRS form 1023 for 501(c)(3) tax-exempt status from final approval through May 2012.
- Facility Contract will be secured between May and July 2011.
- a. Facility permits and design will be obtained from June to September 2011.
- Pacific Heritage Academy will NOT rely on the Federal Charter School Start-up Grant. However, in the event funds are available for this Grant, Pacific Heritage Academy will apply and submit an application between June and July 2011.



- Open enrollment and marketing will be conducted from May 2011 through January 2012.
- Building of a new construction or remodeling of an existing structure will occur from October through August 2011.
- Recruiting, interviewing and hiring of a Pacific Heritage Academy Director will be from October through December of 2011. During the planning year, the Director will be considered a part-time consultant and paid as such. Following hire, the Director will begin the hiring process for teachers.

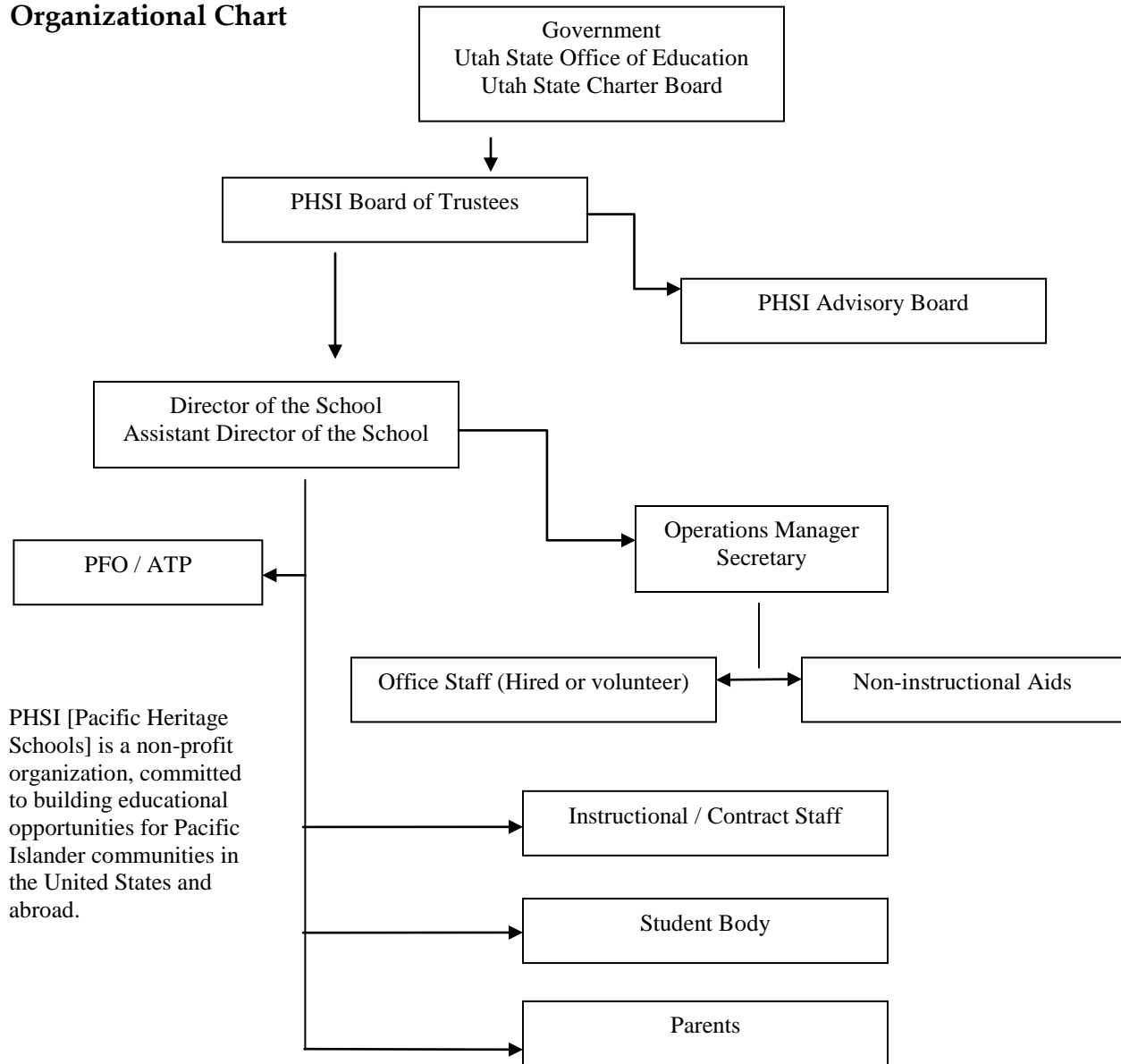
#### *Year 2012*

- In the event Pacific Heritage Academy receives more enrollment applications than its maximum student capacity, a lottery will be held in February 2012.
- Hiring of teachers will begin in February 2012 and continue until June 2012.
- School lunch plans for the entire school year will be setup from March through August 2012.
- Benefits Package for full-time staff will be setup between the months of April and June 2012.
- School equipment will be purchased and setup in March and proceed through August 2012.
- Hiring of office staff (office manager and administrative assistant), will be between June and July 2012.
- CACTUS and SIS will be setup in July and August 2012.
- Open house is scheduled for the last week in August 2012.
- Pacific Heritage Academy Inauguration and first day of school will be in September (see Section 4: Calendar & Bell Schedule).

## Management Team

The management team of Pacific Heritage Academy will rest on the Board of Trustees as outlined below (and detailed in Section 10).

### Organizational Chart



### Organizational Narrative

The organizational structure of Pacific Heritage Academy is intentionally small. This will enable us to maximize the funding available for classroom instruction. Pacific Heritage Academy will have a Director, Operations Assistant and Secretary. Additionally, staffing includes classroom teachers, special education, music, and





PE/Adventure teachers. These structures are detailed in Sections 10 and 20. The Pacific Heritage School [PHSI] Board of Trustees determines school and board policy and empowers the School Director to implement. The Board of Trustees will also consult with the PHSI Advisory Board in matters of school operation. The School Director communicates and implements policy from the Board of Trustees with staff, students, families, and the PFO/ATP [Action Team for Partnerships]. Staff, students, and families may take information or grievances to the School Director or to the PFO/Site Council or the Board Liaison.

## **Collaboration & Partnerships**

At Pacific Heritage Academy we value the opportunities to partner and collaborate to fulfill our mission and reach our goals. We have had a great deal of success in our efforts and planning so far in connecting with ideal consultants, advisors, and partners. We continue to be aware of ways to collaborate with others who have experience and expertise to bring about the ambitious vision for our school.

*Expeditionary Learning Schools:* We have developed an ongoing relationship with western states leaders and school designers from this national organization. We have budgeted for an extensive professional development contract which will ensure the correct and effective implementation of the EL Model. We will take full advantage of this powerful professional development model as we grow our organization of leaders and teachers with exceptional skills and passion for the learning process.

*Other EL Schools:* In our research on best practices, we have developed relationships with three model charter k-8 schools. These include Entheos Expeditionary Learning School in Kearns, Utah and Venture Academy in Ogden, Utah. We are exploring the development of annual summits and conferences with them and other western states schools. They have already been helpful to us and have expressed a willingness to offer ongoing counsel and assistance as we start into our first year. We are very excited about these relationships and the opportunity to collaborate as a Utah EL community. We anticipate being able to share teacher training, transportation costs, expedition costs, substitutes, special education expertise, and equipment with these other Utah Expeditionary Learning Schools.

*Other Collaboration:* Because our curriculum emphasizes community service, we will seek to develop partnerships with the community including, Utah State Parks & Recreation, local businesses, cities & counties, school districts, cultural organizations, local churches, and other non-profit groups.



# **Expeditionary Learning Schools Outward Bound**

Proposal for Pacific Heritage Academy – Salt Lake City, UT

Planning year Memorandum of Understanding (MOU)  
September 1, 2010 – August 31, 2011

12 days - ELS Direct Service (Includes planning time, ELS staff travel, and expenses)

Off-site Professional Development

4 slots for 5-day Institutes or Learning Expeditions for Educators

4 slots for 3-day Institutes

1 Leadership cohort participation

4 registrations to the National Conference

4 registrations for the Pre-conference day experiences

4 registrations for site seminar slots

Cost of proposed Planning Year MOU \$26, 500.00

Years 1 – 3 of implementation

28 days - ELS Direct Service (includes planning time, ELS staff travel, and expense)

8 staff memberships (\$300 for each additional)

Off-site Professional Development

2 slots for 5-day Institutes or Learning Expeditions for Educators

4 slots for 3-day Institutes

1 Leadership cohort participation

4 registrations to the National Conference

4 registrations for the Pre-conference day experiences

Cost of proposed Year 1 - 3 MOU \$45, 500.00



# SECTION 8

# BUDGET

## Operational Year 1 Budget

Charter School Name:		PACIFIC HERITAGE ACADEMY					
Year One	Enrollment Maximum or Target			75% Enrollment			
	Operations Year 1			Operations Year 1			
Number of Students:	450			338			
Grade Distribution:	K - 8th			K - 8th			
<b>Revenue</b>	<b>Total</b>			<b>Total</b>			
Local Funding including anticipated fees from students							
Fee Basis if applicable:							
State Funding	\$2,275,949			\$1,735,416			
Private Grants & Donations							
Source: (specify)							
Loans:							
Commercial							
Private							
Other (specify): NSLP (see associated NSLP cost O&M 800 below)	\$130,000			\$110,000			
Other (specify): Federal Start-up							
<b>Total Revenue</b>	\$2,405,949			\$1,845,416			
<b>Expenses</b>	<b># of Staff</b>	<b>@ Salary</b>	<b>Total</b>	<b># of Staff</b>	<b>@ Salary</b>	<b>Total</b>	
Salaries (100)							
Director or Principal	1.00	60,000	60,000	1.00	60,000	60,000	
Other Administration: Assistant Director (part-time)	1.00	32,000	32,000	1.00	21,500	21,500	
Teacher-Regular Ed	17.00	36,000	612,000	13.00	32,000	416,000	
Teacher-Special Ed/Coordinator	1.50	40,000	60,000	1.25	38,000	47,500	
Instructional Guide [Senior Curriculum Instructor]	1.00	40,000	40,000	1.00	35,000	35,000	
Operations Manager (1.0) (part-time)/Secretary (.5) (part-time)	1.50	30,000	45,000	1.00	25,000	25,000	
Program Facilitator/Instructional Support	1.50	30,000	45,000	1.25	20,000	25,000	
(.5 FTE Music, .5 FTE Art, .5 FTE PE/Adventure Coordinator)							
Speech & Language Therapist (Contractor)							
Counselor (Certified/Noncertified) (Circle) (part-time)			15,000			14,500	
Substitute Teachers (daily basis)			12,000			9,000	
Teachers Aids and ParaProfessionals			20,000			15,000	
Employee Benefits (200)							
Retirement (6% of all Full Time Employees)			53,640			31,500	
FICA (7.65% of all Payroll)			71,987			51,140	
SUTA (0.7% of all Payroll)			6,587			4,680	
WCF (0.4% of all Payroll)			3,764			2,674	
Health/HRA/COBRA			147,000			107,250	
Purchased Professional Services(300)							
Contract Services: Audiologist, Psychologist, etc.							
Professional Development (330) (EL Schools)			60,000			40,000	



Supplies(600)					
Instructional and other general supplies (610)			20,000		13,000
Library Instructional Aids/Books/Periodicals(640/645)			20,000		8,000
Textbooks (641)			20,000		10,000
Audiovisual Materials (646)			5,000		5,000
Software (670)			2,000		2,000
Expeditions/Curriculum			50,000		35,000
Other (printing; postage)			2,000		1,000
<b>Total Instruction, Administration &amp; Support</b>			<b>1,508,578</b>		<b>1,041,744</b>
<b>Operations &amp; Maintenance</b>			<b>Total</b>		<b>Total</b>
Purchased Property Services(400)					
Facilities Rental or Lease (440) (35,000 sf @ \$13)			455,000		455,000
Water, Sewage , Disposal Services (see Utilities)					
Property Tax			30,000		30,000
Equipment or Vehicle Rental or Lease/Purchase Agreements			1,200		
Custodial Services			20,000		15,000
Other Purchased Services (500)					
Property/Casualty Insurance (520/521)			11,100		9,084
Advertising and Marketing			2,000		1,000
Printing and Binding			2,000		1,000
Phone/Communications			9,000		9,000
Supplies (600)					
Operational Supplies			15,000		10,000
Utilities and other Expendable Supplies (610-630)			36,000		35,000
Property (700)					
Land & Improvements			2,000		1,000
Buildings			2,000		1,000
Technology-Related Hardware (Computers etc)			35,000		25,000
Furniture & Other Equipment			20,000		5,000
Debt Service and Miscellaneous Costs (800)					
Fees/Permits & dues			500		500
Loan Payments			18,000		18,000
Other (security, copier lease)			10,000		4,500
Food Service Program Costs			110,000		90,000
National Network of Partnership Schools (NNPS)			400		400
<b>Total Operations &amp; Maintenance</b>			<b>779,200</b>		<b>710,484</b>
<b>Total Expenditures</b>			<b>2,287,778</b>		<b>1,752,228</b>
<b>Total Revenues</b>			<b>2,405,949</b>		<b>1,845,416</b>
			<b>Balance</b>		<b>Balance</b>
<b>Budget Balance (Revenues-Expenditures)</b>			<b>118,172</b>		<b>93,189</b>
<b>Budget Balance as Percentage of State Revenue</b>			<b>5.19%</b>		<b>5.37%</b>



## Operational Year

Charter School Name: <b>PACIFIC HERITAGE ACADEMY</b>						
Year Two	Enrollment Maximum or Target			75% Enrollment		
	Operations Year 2			Operations Year 2		
Number of Students:	450			338		
Grade Distribution:	K - 8th			K - 8th		
<b>Revenue</b>	<b>Total</b>			<b>Total</b>		
Local Funding including anticipated fees from students						
Fee Basis if applicable:						
State Funding	\$2,275,949			\$1,735,416		
Private Grants & Donations						
Source: (specify)						
Loans:						
Commercial						
Private						
Other (specify): NSLP (see associated NSLP cost O&M 800 below)	\$140,000			\$120,000		
Other (specify): Federal Start-up						
<b>Total Revenue</b>	<b>\$2,415,949</b>			<b>\$1,855,416</b>		
<b>Expenses</b>	<b># of Staff</b>	<b>@ Salary</b>	<b>Total</b>	<b># of Staff</b>	<b>@ Salary</b>	<b>Total</b>
Salaries (100)						
Director or Principal	1.00	65,000	65,000	1.00	62,000	62,000
Other Administration: Assistant Director (part-time)	1.00	35,000	35,000	1.00	22,500	22,500
Teacher-Regular Ed	17.00	37,000	629,000	13.00	33,000	429,000
Teacher-Special Ed/Coordinator	1.50	41,000	61,500	1.25	39,000	48,750
Instructional Guide [Senior Curriculum Instructor]	1.00	41,000	41,000	1.00	36,000	36,000
Operations Manager (1.0) (part-time)/Secretary (.5) (part-time)	1.50	32,000	48,000	1.00	26,000	26,000
Business Manager/Bookkeeper (Contractor) (see 310)						
IT Technician (Contractor) (300) (including IT Services)]						
Program Facilitator/Instructional Support (.5 FTE Music, .5 FTE Art, .5 FTE PE/Adventure Coordinator)	1.50	36,000	54,000	1.00	34,000	34,000
Speech & Language Therapist (Contractor)						
Counselor <del>Certified</del> Noncertified) (Circle) (part-time)			15,000			14,500
Substitute Teachers (daily basis)			12,000			9,000
Teachers Aids and ParaProfessionals			23,000			15,000
Employee Benefits (200)						
Retirement (6% of all Full Time Employees)			56,010			39,495
FICA (7.65% of all Payroll)			75,238			53,301
SUTA (0.7% of all Payroll)			6,885			4,877
WCF (0.4% of all Payroll)			3,934			2,787
Health/HRA/COBRA			147,000			105,875
Purchased Professional Services(300)						
Contract Services: Audiologist, Psychologist, etc.						
Professional Employee Training and Development (330) (EL Schools)			60,000			40,000
Services in Support of Management (310) (Business Manager, etc.)			60,000			40,000
Legal (300)			3,000			3,000
Audit Services (300)			10,000			10,000
Web Site Development (300) (including IT Services)			15,000			12,000
Purchased Property Services(400)						
Facilities Rental or Lease (440)						
Property Tax						
Equipment or Vehical Rental or Lease/Purchase Agreements						
Other Purchased Services (500)						
Travel (580)			10,000			5,000
Transportation (Student) (510-513)			7,600			
Personnel and Wage Records and Data Management						



Supplies(600)					
Instructional and other general supplies (610)			10,000		5,000
Library Instructional Aids/Books/Periodicals(640/645)			10,000		5,000
Textbooks (641)			20,000		5,000
Audiovisual Materials (646)			5,000		5,000
Software (670)			2,000		2,000
Expeditions/Curriculum			40,000		35,000
Other (printing; postage)			2,000		1,000
<b>Total Instruction, Administration &amp; Support</b>			<b>1,527,166</b>		<b>1,071,086</b>
<b>Operations &amp; Maintenance</b>			<b>Total</b>		<b>Total</b>
Purchased Property Services(400)					
Facilities Rental or Lease (440) (35,000 sf @ \$13)			455,000		455,000
Water, Sewage , Disposal Services (see Utilities)					
Property Tax			35,000		30,000
Equipment or Vehicle Rental or Lease/Purchase Agreements			1,200		
Custodial Services (Part-time)			20,000		15,000
Other Purchased Services (500)					
Property/Casualty Insurance (520/521)			11,100		9,084
Advertising and Marketing			2,000		1,000
Printing and Binding			2,000		1,000
Phone/Communications			9,000		9,000
Supplies (600)					
Operational Supplies			15,000		10,000
Utilities and other Expendable Supplies (610-630)			36,000		35,000
Property (700)					
Land & Improvements			2,000		1,000
Buildings			2,000		1,000
Technology-Related Hardware (Computers etc)			15,000		10,000
Furniture & Other Equipment			5,000		5,000
Debt Service and Miscellaneous Costs (800)					
Fees/Permits & dues			500		500
Loan Payments			36,000		18,000
Other (security, copier lease)			10,000		4,500
Food Service Program Costs			115,000		90,000
National Network of Partnership Schools (NNPS)			200		200
<b>Total Operations &amp; Maintenance</b>			<b>772,000</b>		<b>695,084</b>
<b>Total Expenditures</b>			<b>2,299,166</b>		<b>1,766,170</b>
<b>Total Revenues</b>			<b>2,415,949</b>		<b>1,855,416</b>
			<b>Balance</b>		<b>Balance</b>
<b>Budget Balance (Revenues-Expenditures)</b>			<b>116,783</b>		<b>89,247</b>
<b>Budget Balance as Percentage of State Revenue</b>			<b>5.13%</b>		<b>5.14%</b>

## Operational Years 1 & 2 Narratives

It is a priority at Pacific Heritage Academy to manage school finances in the most effective and efficient way. Detailed below are the budget narratives for operational years 1 and 2. Pacific Heritage Academy will not rely or become dependent on private grants and donations as the budget reflects. It will also include the budget for 75% enrollment for both operational years.

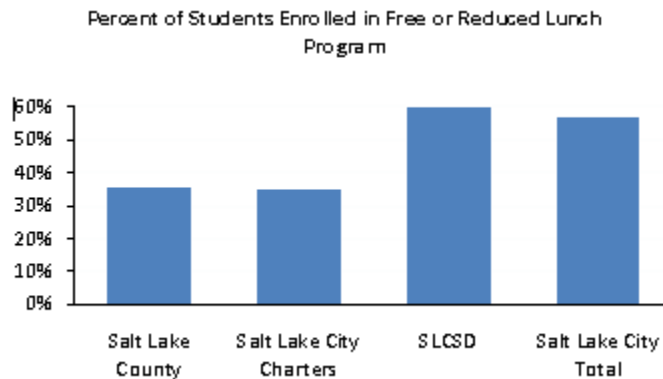
## REVENUES



*State Funding:* State Funding of \$2,293,303 for each operational year, 1 and 2, are based on the WPU [Weighted Pupil Unit]:

- At full enrollment, Pacific Heritage Academy will serve K – 8<sup>th</sup> grades with a maximum of 25 students per classroom. Total student enrollment is 450 with 17 teachers.
- At 75% enrollment, Pacific Heritage Academy will serve K – 8<sup>th</sup> grades with 338 students enrolled and 13 teachers with state funding of \$1,745,997 for each operational year, 1 and 2.

*NSLP (National School Lunch Program):* Students residing in Salt Lake City are more economically disadvantaged than those in Salt Lake County. According to the USOE, approximately 60% of Salt Lake City School District students where Pacific Heritage Academy will be located, are enrolled in Free or Reduced Lunch Program.



*(www.utahchildren.org)*

Pacific Heritage Academy anticipates \$130,000 as revenue to cover the expenses for the program. Please Refer to budget Food Service Program Costs (800) in operations year 1 and 2. Examples available upon request.

## EXPENDITURES

### Salaries (100)

*Director or Principal:* Pacific Heritage Schools Board of Trustees will hire the School Director as of December 31, 2011 of the planning year, prior to the opening of the school in September 2012. The Director’s salary will start at \$60,000 for both maximum and 75% enrollment, for operational year 1. A salary increase to \$65,000 will occur during operational year 2 at maximum enrollment and \$62,000 at 75% enrollment.



*Other Administration: Assistant Director:* The Assistant Director will be part-time, 30-hours a week, position with a salary of \$32,000 at maximum enrollment, and \$21,500 at 75% enrollment during operational year 1. During year 2, it will increase to \$35,000 at maximum enrollment and \$22,500 at 75% enrollment. Pacific Heritage Academy will consider hiring a college intern for this position.

*Teacher-Regular Ed:* Pacific Heritage Academy has allocated \$36,000 for maximum enrollment with 17 teachers, and \$32,000 for 75% enrollment with 13 teachers, during the first operational year. In second operational year, salary increase will be to \$37,000 at maximum enrollment and \$33,000 at 75% enrollment with 17 teachers at maximum enrollment and 13 at 75%.

*Teacher-Special Ed:* The Special Education teacher will instruct those students with special needs. At 1.5 FTE, the salary of \$40,000 has been allocated at maximum enrollment for operational year 1. However, it will be reduced to \$38,000 with 1.25 FTE if Pacific Heritage Academy meets 75% of enrollment. During operational year 2, it will increase to \$41,000 (1.5 FTE) at maximum enrollment and \$36,000 (1.25 FTE) at 75% enrollment.

*Instructional Guide [Senior Curriculum Specialist]:* Pacific Heritage Academy will hire a part-time Senior Curriculum Specialist, whose purpose is to ensure teachers are implementing the program. The budget will grant \$40,000 for maximum enrollment and \$35,000 at 75% enrollment during operational year 1. During operational year 2, salary will progress to \$41,000 at maximum enrollment and \$36,000 at 75% enrollment.

*Operations Manager (1.0) (part-time)/Secretary (.5) (part-time):* The annual salary for a part-time Operations Manager will be \$30,000 at maximum enrollment and \$25,000 at 75% enrollment during operational year 1. An increase to \$32,000 at maximum enrollment and \$26,000 at 75% enrollment will occur during year 2. A part-time secretary's annual salary will be at \$15,000 at maximum enrollment for years 1 and 2. A part-time secretary will not be hired if enrollment is at 75% for both operational years.

*Business Manager/Bookkeeper (Contractor):* Pacific Heritage Academy may choose to outsource the position of Business Manager and other business related services. The Business Manager will ensure the responsible use and care of school assets, facilities, and funds. Funds for this service will be provided under Official or Administrative Services in Support of Management (310).

*Program Facilitator and Instructional Support:* Pacific Heritage Academy has allocated for 1.5 FTE with a budget of \$30,000 for maximum enrollment and 1.25 FTE at \$20,000 for





75% enrollment during operational year 1. Salary increase will occur during operational year 2 to \$36,000 (1.5 FTE) at maximum enrollment and \$34,000 (1.00 FTE) at 75% enrollment. The FTE will be divided as follow: .5 FTE Music, .5 FTE Art, .5 FTE PE/Adventure Coordinator.

*Counselor (Certified/Noncertified):* Pacific Heritage Academy understands the importance of removing learning barriers and creating open minds and the critical role counselors play in facilitating this change. A part-time counselor for our primary grades (K-6) will be made available on an as-needed basis as a contracted service. A licensed counselor for grades 7-8 will be provided through one of the following options: 1) leveraging dual-certification of teacher, staff, administrator, etc., 2) counseling coalition with area schools, or 3) contracting services with an educational management company. A budget of \$15,000 has been allocated for the first two years of operation at maximum enrollment, with \$14,500 at 75% enrollment for both operational years one and two.

*Substitute Teachers:* During operational year 1, total annual wages of \$15,000 at 176 substitute days, will result in daily wages of \$85.22 at maximum enrollment and \$10,000 for 75% enrollment. An increase to \$16,000 total annual wages will apply at maximum enrollment during the second year of operation, making the daily wages at \$90.90 at maximum enrollment and \$10,000 total annual wages at 75% enrollment.

*Teachers Aids and Paraprofessionals:* Pacific Heritage Academy anticipates class sizes of 25 or smaller and will allocate \$20,000 at maximum enrollment for three part-time aids and \$15,000 at 75% enrollment during operational years 1 and 2 for two part-time aids. An increase to \$23,000 at maximum enrollment will occur during year 2. The additional 3 years will allow the Director to increase hours if needed.

Employee Benefits (200)

<b>Operational Year 1</b>	<b>450 Enrollment</b>	<b>75% (338) Enrollment</b>
Retirement (6% of all Full Time Employees)	54,120	32,175
FICA (7.65% of all Payroll)	71,681	51,140
SUTA (0.7% of all Payroll)	6,559	4,680
WCF (0.4% of all Payroll)	3,748	2,674
Health/HRA/COBRA	147,000	107,250



<b>Operational Year 2</b>	<b>450 Enrollment</b>	<b>75% (338) Enrollment</b>
Retirement (6% of all Full Time Employees)	56,580	40,440
FICA (7.65% of all Payroll)	75,123	53,474
SUTA (0.7% of all Payroll)	6,874	4,893
WCF (0.4% of all Payroll)	3,928	2,796
Health/HRA/COBRA	147,000	105,875

Please note, Pacific Heritage Academy will **NOT** participate in the Utah Retirement System, but will provide a flexible, economical, and self-directed retirement plan for full-time employees.

Purchased Professional Services (300)

*Professional Employee Training and Development (330) EL Schools:* Expeditionary Learning Schools will partner with Pacific Heritage Academy to provide a package of services to faculty and school leaders to foster the full implementation of the ELS school reform design. A suggested MOU (Memorandum of Understanding) can be found at the end of section 7. Funds of \$60,000 for maximum enrollment, and \$40,000 for 75% enrollment has been budgeted for operational year one. For year two, \$50,000 for maximum enrollment and \$35,000 for 75% enrollment has been allocated for this important service.

*Official or Administrative Services in Support of Management (310):* The amount of \$60,000 for each operational year 1 and 2 has been allocated for maximum enrollment. For operational years 1 and 2, a reduction to \$40,000 will occur for 75% enrollment. This represents the benefits and salary of an in-house Business Manager and total contracted amount if outsourced.

*Legal Services (300):* A reserve of \$3,000 per year for this service will be provided for operational years 1 and 2 at both maximum and 75% enrollment. Pacific Heritage Academy will use this service to consult with legal counseling on issues of school policies if needed.

*Audit Services (300):* \$2,000 has been budgeted for operational year 1 for both maximum and 75% enrollment. This amount reflects a review only of the Planning Year by Squire & Company. An increase to \$10,000 will be allocated for operational year 2 for maximum and 75% enrollment.



*Web Site Development (300) (including IT Services):* Funds for this outsourced service will be \$23,000 for maximum enrollment and \$12,000 at 75% enrollment for the 1<sup>st</sup> operational year. During year 2, this will decrease as the majority of website designing, network set-up, etc. will take place during operational year 1. \$15,000 will be allocated for maximum enrollment and \$12,000 at 75% enrollment.

#### Other Purchased Services (500)

*Travel (580):* Funds will be allocated to cover travel expenses incurred by Pacific Heritage Academy Director, faculty, staff and board when attending Expeditionary Learning Local Workshops, Regional Summits and National Conferences as part of their Professional Development. \$10,000 for maximum enrollment and \$5,000 for 75% enrollment for each operational years 1 and 2.

*Transportation (Student) (510-513):* All 7<sup>th</sup> and 8<sup>th</sup> grade students who attend Pacific Heritage Academy will be given a UTA bus pass for the school year. The budget allocated \$7,600 for each operational year 1 and 2 with a maximum enrollment and zero funds for 75% enrollment.

#### Supplies (600)

*Instructional and other General Supplies (610) & Library Instructional Aids/Books/Periodicals (640/645):* Through Learning Expeditions, Pacific Heritage Academy will not be limited to textbooks, but students will have access various sources for reading. Pacific Heritage Academy anticipates donations of books, software, library materials and supplies, but will be prepared to purchase these items using the funds allotted of \$20,000 for Instructional and other general supplies at maximum enrollment and \$13,000 at 75% enrollment for operational year 1. For year 2, this amount will decrease to \$10,000 for maximum enrollment and \$5,000 for 75% enrollment. Library Instructional Aids/Books/Periodicals have been budgeted at \$20,000 for maximum enrollment and \$13,000 for 75% enrollment for year 1. In year 2, this amount also decreases to \$10,000 for maximum enrollment and \$5,000 for 75% enrollment.

*Textbooks (641):* Pacific Heritage Academy will implement the design of Expeditionary Learning Schools which encourages students to focus more on real-life, project-based, experiential and innovative projects and research. For this purpose, less of the budget is dedicated to textbooks than in other traditional school designs. \$20,000 for both operational years 1 and 2, will be allocated for maximum enrollment and \$10,000 for 75% .



*Software (670):* The majority of software purchasing will be made during the planning year. However, \$2,000 has been budgeted for both maximum and 75% enrollment for operational years 1 and 2.

*Expeditions/Curriculum.* Pacific Heritage Academy will ensure the first operational year will receive \$50,000 for maximum enrollment and \$35,000 for 75% enrollment. \$40,000 for maximum enrollment and \$30,000 for 75% enrollment will be allocated for the second operational year. This important fund is needed to cover learning expedition costs.

*Other (printing postage):* Shipping and handling of school-related information, such as report cards, newsletters, fliers, etc. will be covered for \$2,000 for maximum enrollment and \$1,000 for 75% enrollment each operational year consecutively.

## **OPERATIONS AND MAINTENANCE**

### Purchased Property Services (400)

*Facilities Rental or Lease (440):* Pacific Heritage Academy anticipates it will remodel an existing structure or build a new construction with minimum square foot requirements of 35,000 at \$13.00 a square foot. In year one, the cost of \$455,000 for maximum and 75% enrollment will also apply to year two.

*Property Tax:* An approximate tax amount of \$30,000 for maximum and 75% enrollment for the first year is based on a 35,000 square foot building. For the second of operation, the amount is increased to \$35,000 for maximum enrollment and \$30,000 for 75% enrollment.

*Equipment or Vehicle Rental or Lease/Purchase Agreements:* \$1,200 for each operational years (1 and 2), will be allocated for maximum enrollment and zero funds for 75% enrollment. These funds will be used for vehicle rental expenses for expeditions if needed.

*Custodial Services:* Pacific Heritage Academy will outsource this service on a part-time basis at \$30,000 for maximum enrollment for both operational years and \$20,000 at 75% enrollment for operational years 1 and 2.

### Other Purchased Services (500)



*Property/Casualty Insurance (520/521):* Insurance costs are approximate for the maximum enrollment for operational years 1 and 2 at \$11,000 and \$9,084 for 75% enrollment per year.

*Advertising and Marketing:* Pacific Heritage Academy will actively participate in advertising and marketing the school by using flyers, signage, pamphlets, etc. to inform the community about Pacific Heritage Academy. This expenditure will also cover meeting halls, fair booths, and other equipment needed for promoting the school. \$2,000 will be designated for maximum and 75% enrollment per each operational year (1 and 2).

*Printing and Binding:* Student handbooks will be developed during the planning year, but will not be printed and distributed until operational year one. An approximate cost for this service is \$2,000 for maximum enrollment and \$1,000 for 75% enrollment. The same cost will apply for operational year two.

*Phone Communications:* Pacific Heritage Academy plans to use wireless technology as much as possible. Therefore, using Comcast or Vonage VOIP (Voice Over Internet Protocol) is ideal. \$9,000 has been allocated per operational year (1 and 2) for maximum and 75% enrollment.

### Supplies (600)

*Operational Supplies:* \$20,000 has been budgeted for maximum enrollment and \$10,000 for 75% enrollment for operational year 1. \$15,000 for the maximum enrollment and \$10,000 for 75% enrollment will be for operational year 2.

*Utilities and other Expendable Supplies (610-630):* An estimate expense for utilities for the 1<sup>st</sup> operational year at maximum and 75% enrollment will be \$35,000. This amount will slightly increase to \$36,000 for maximum enrollment and \$35,000 for 75% enrollment during the second year of operation.

### Property (700)

*Land & Improvements:* Pacific Heritage Academy will depend on parent and student volunteers to assist with beautifying and maintenance of school grounds. For this purpose, \$2,000 for maximum enrollment and \$1,000 for 75% enrollment will be for each operational year (1 and 2).



*Buildings:* Student and parent volunteers will assist in the care and maintenance of the school building. \$2,000 for maximum enrollment and \$1,000 for 75% enrollment will be for each year of operation (1 and 2).

*Technology-Related Hardware (Computers etc):* The Pacific Heritage Academy Technology Plan (see Section 22, Technology Plan), is based on values of practicality and economy and a belief that any investment in technology should be with an eye to future and the guarantee of change and improvement. We choose to be conservative and realistic in our planning and purchases. Pacific Heritage Academy will allow curriculum (learning expeditions) to drive the development or acquisition of school technology and other media resources. Because the thematic units of study for each grade will require access to both written and virtual resources by faculty, students, and support staff, our library media and our technology equipment will be acquired as expeditions are designed and implemented over time. Knowing that each unit will require specific and perhaps specialized technological tools with which to learn and to produce final products, presentations or performances, we will plan a budget that supports the careful and eventual acquisition of both.

As curricular mapping and expedition planning occur over the first few years of operation, these learning units (expeditions) will become the core curriculum of the school. Technology resources therefore will be needed and utilized repeatedly and will also then require reexamination for inevitable updates and improvements as well as new inventions, products and sources. It is part of our vision to see each learning expedition (thematic unit of study) supplied with the resources and tools needed for faculty and students to fully explore, discover, support and convey the topics, themes and outcomes of their inquiry. All technology requests will incorporate discussion of how the technology can be evaluated for their impact on teaching and learning. This will also assist in our efforts to seek and justify technology funding. A budget of \$35,000 for maximum enrollment and \$25,000 for 75% enrollment will be for the first year of operation. \$15,000 for maximum enrollment and \$10,000 for 75% enrollment will be allocated for the second year.

*Furniture & Other Equipment:* \$20,000 will be budgeted for the first year at maximum enrollment and \$5,000 for 75% enrollment. This amount will greatly decrease during the second year at \$5,000 for both maximum and 75% enrollment. Pacific Heritage Academy anticipates it will purchase most of its furniture and other equipment during the planning year and the first year of operation.

Debt Service & Miscellaneous Costs (800)



*Fees/Permits & dues:* The \$500 fee, for both maximum and 75% enrollment, is for the first and second operational years to cover the Pacific Heritage Academy's membership in the Utah Association of Public Charter Schools.

*Loan Payments:* An estimated budget of \$18,000 will be allocated for year 1 for maximum and 75% enrollment. In year 2, this amount increases to \$36,000 for maximum enrollment and \$18,000 for 75% enrollment.

*Other (security, copier lease):* \$10,000 for maximum student enrollment and \$4,500 for 75% enrollment, has been allocated to cover leasing options for office and school equipment such as copiers for each operational year (1 and 2).

*Food Service Program Costs:* An estimated amount of \$110,000 will be budgeted for maximum enrollment and \$90,000 for 75% enrollment for operational year one. An increase will occur in year two at \$115,000 for maximum enrollment and \$92,000 for 75% enrollment.

*National Network of Partnership Schools (NNPS):* Pacific Heritage Academy will participate in the NNPS program and has designated \$400 from the budget for operational year one for maximum and 75% enrollment. A decrease of \$200 will transpire during operational year two for maximum and 75% enrollment.



## WPU Worksheets

### Maximum Enrollment, Operational Years 1 and 2

### Operational Years 1 and 2

Pacific Heritage Academy	Maximum Enrollment; 450	Average Daily Membership	Factor	WPU
Estimated ADM (K)	50		0.55	27.5
Estimated ADM (1-3)	150		0.9	135
Estimated ADM (4-6)	150		0.9	135
Estimated ADM (7-8)	100		0.99	99
Estimated ADM (9-12)	0		1.2	0
Special Ed Pre-School	0			
Special Ed ADM (K)	5			
Special Ed ADM (1-12)	40			
Special Ed (Self-Contained)	0			
Number of Teachers (K-6)	13			
Number of Teachers (7-12)	4			
WPU Value	\$2,577			
Prior Year Teacher FTE (CACTUS)	0			
School Administrators (CACTUS)	0			
Prior Year WPUs	0			
ELL Students	0			
Low Income Students-prior year	0			

Program Name	Rate	WPU	Amount
<b>WPU Programs</b>			
<b>Regular Basic School:</b>			
Regular WPU K-12	See above	396.5000	\$ 1,021,781
Professional Staff	0.04200	16.6530	42,915
<b>Restricted Basic School:</b>			
Special Ed--Add-on	1.0000	42.7500	110,167
Spec. Ed. Self-Contained	1.0000	0.0000	-
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$226.30 per K-8 ADM		101,835
<b>Total WPU Programs</b>		<b>455.9030</b>	<b>\$ 1,276,697</b>
<b>Non-WPU Programs</b>			
<b>Related to Basic Programs:</b>			
Flexible Allocation - WPU Distribution	\$ 406.24 per WPU		\$ 185,206
Interventions-Student Success	\$22.79 per K-12 WPU		9,036
<b>Special Populations</b>			
At Risk Regular Program	\$6.43 per total prior year WPUs; OR If new, \$6.43 X C35 or current WPUs		- 2,931
Gifted and Talented	\$3.63 per K-12 WPU		1,439
<b>Other</b>			
School Land Trust Program	\$34.38 per student		15,471
Reading Achievement Program	\$25 per WPUs		11,398
	\$2.57 per K-3 student		514
	\$41.92 per low income student		-
Charter Administrative Costs	\$100 per student		45,000
Educator Salary Adjustment (ESA)	\$4,200 per qualified educator plus benefits		-
ESA-School Administrators	\$2,500 per qualified administrator		-
<b>Local Replacement Dollars</b>	Average \$1,607 per student		723,150
<b>Total Non-WPU</b>			<b>\$ 994,146</b>
<b>One Time</b>			
Teacher Materials/Supplies	\$360 or \$285 per teacher (K-6) <sup>1</sup>	13	3,705
	\$310 or \$235 per teacher (7-12) <sup>2</sup>	4	940
Library Books and Resources	\$1.026 per student	450	462
<b>Total One Time</b>			<b>\$ 5,107</b>
<b>ESTIMATED Total All State Funding</b>			<b>\$2,275,949</b>





## 75% Enrollment, Operational Years 1 and 2

### Operational Years 1 and 2

#### 75% of Enrollment; 338

Pacific Heritage	ADM	Factor	WPU
Estimated ADM (K)	38	0.55	20.9
Estimated ADM (1-3)	100	0.9	90
Estimated ADM (4-6)	100	0.9	90
Estimated ADM (7-8)	100	0.99	99
Estimated ADM (9-12)	0	1.2	0
Special Ed Pre-School	0		
Special Ed ADM (K)	4.56		
Special Ed ADM (1-12)	36		
Special Ed (Self-Contained)	0		
Number of Teachers (K-6)	10		
Number of Teachers (7-12)	3		
WPU Value	\$2,577		
Prior Year Teacher FTE (CACTUS)	0		
School Administrators (CACTUS)	0		
Prior Year WPUs	0		
ELL Students	0		
Low Income Students-prior year	0		

Program Name	Rate	WPU	Amount
<b>WPU Programs</b>			
<b>Regular Basic School:</b>			
Regular WPU - K-12	See above	299.9000	\$ 772,842
Professional Staff	0.04200	12.5958	32,459
<b>Restricted Basic School:</b>			
Special Ed--Add-on	1.0000	38.5080	99,235
Spec. Ed. Self-Contained	1.0000	0.0000	-
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$226.30 per K-8 ADM		76,489
<b>Total WPU Programs</b>		<b>351.0038</b>	<b>\$ 981,026</b>
<b>Non-WPU Programs</b>			
<b>Related to Basic Programs:</b>			
SS & Retirement	\$ 406.24 per WPU		\$ 142,592
Interventions-Student Success	\$22.79 per K-12 WPU		6,835
	\$61.92 per ELL student		-
<b>Special Populations</b>			
At Risk Regular Program	\$6.43 per total prior year WPUs; OR If new, \$6.43 X C35 or current WPUs		- 2,257
Gifted and Talented	\$3.63 per K-12 WPU		1,089
<b>Other</b>			
School Land Trust Program	\$34.38 per student		11,620
Reading Achievement Program	\$25 per WPUs		8,775
	\$2.57 per K-3 student		355
	\$41.92 per low income student		-
Charter Administrative Costs	\$100 per student		33,800
Educator Salary Adjustment (ESA)	\$4,200 per qualified educator plus benefits		-
ESA-School Administrators	\$2,500 per qualified administrator		-
<b>Local Replacement Dollars</b>	Average \$1,607 per student		543,166
<b>Total Non-WPU</b>			<b>\$ 750,488</b>
<b>One Time</b>			
Teacher Materials/Supplies	\$360 or \$285 per teacher (K-6) <sup>1</sup>	10	2,850
	\$310 or \$235 per teacher (7-12) <sup>2</sup>	3	705
Library Books and Resources	\$1.026 per student	338	347
<b>Total One Time</b>			<b>\$ 3,902</b>
<b>ESTIMATED Total All State Funding</b>			<b>\$1,735,416</b>

## SECTION 9

# FISCAL PROCEDURES

Pacific Heritage Academy Board of Trustees have discussed and approved the following fiscal procedures. These have been officially adopted in an open and public meeting held on February 10, 2010, as evidenced in the attached approved meeting minutes. It is our goal to operate PHA in the most fiscally responsible manner.

### **Finance Committee**

Pacific Heritage Academy will create a Finance Committee consisting of qualified board members. The Finance Committee will meet with our Business Service Provider on a quarterly basis or as often as is deemed necessary to ensure the complete adherence to all fiscal procedures here to set forth.

### **Business Service Provider**

Pacific Heritage Academy has considered a number of options for successfully handling our business and finance operations. We have chosen to follow state procurement laws in selecting from a number of service providers. We anticipate using the financial consultation and varied business services of one of these contractors. A Finance Manager will be assigned by the contractor to duties and areas of responsibility that include but are not limited to; budgeting and planning, reporting to the school board, school director, state and federal agencies, accounts payable, accounting and cash management, and payroll services.

### **Budget Process**



Pacific Heritage Academy Finance Committee will meet with the Business Service Provider to develop and present to the Board a budget for the upcoming fiscal year. The final budget shall be approved on or before the preceding May 31. The budget shall include sufficient detail and documentation. Budget requests shall be submitted by individual departments to the PHA Finance Committee.

### **Check Policy**

Checks must be signed by two authorized individuals; the head of the Finance Committee and the school Director.

### **Budget Reports**

Budget reporting requirements will be the responsibility of the Business Service Provider overseen by the Finance Committee. Monthly Board Reports will be requisite, indicating the proposed budget, current status and a forecast for the remainder of the fiscal year. Weekly reports submitted to the Director will recap the budget decisions and ensure policy standards are adhered to. The required State and Federal reporting guidelines will be strictly followed to ensure complete compliance by Pacific Heritage Academy.

### **Policy on Making Appropriations in Excess of Estimated Revenue**

The budget approved by the Pacific Heritage Schools Board of Trustees shall not make appropriations in excess of estimated revenue. The business manager and chief budget officer will ensure that funds are not expended in excess of existing appropriations or otherwise without board approval occurring prior to expenditure.

### **Expendable Revenue**

Pacific Heritage Schools Board of Trustees shall have the authority to designate the use of expendable revenue. The Finance Committee may recommend appropriations for expendable revenue. Recommendations may include, but are not limited to; amounts to be used for extended contracts for administrators and teachers, additional computers, student travel appropriations, or additional curriculum resources.

### **Policy on Undistributed Reserves**



After the initial three year start up period, the yearly budget shall include undistributed reserves equal to at least 25% of the estimated debt obligations for the coming fiscal year.

### **Audit of Accounts**

All accounts shall be subject to audit annually. In accordance with Generally Accepted Accounting Principles, which include Generally Accepted Governmental Auditing Standards financial reports will be issued reporting school revenue and expenditures. The audits will be performed in accordance with both federal and state auditing requirements. Pacific Heritage Academy is committed to reviewing and implementing recommendations from the auditor.

### **Policies on Emergency Expenditures**

PHA Finance Committee shall follow all procurement policies outlined in the fiscal procedures except in case of emergency. Power is granted to the Finance Committee to authorize emergency expenditures outside of these policies if the school has funds available for such a purchase and only when the immediate health, safety, or welfare of Pacific Heritage Academy students or employees is at risk or if the school will suffer financial or operational damage. The Finance Committee shall notify the Board President within 24 hours or as soon as possible. A written report stating the basis for the emergency and the details of the particular expense shall be submitted to the Board and will be included in the school's financial records.

### **Purchasing Policies and Procedures**

Pacific Heritage Schools procures only those items and services that are required to perform the mission and/or fill a bona fide need. The term procurement[s] include all activities that involve buying, purchasing, renting, leasing, or otherwise acquiring any supplies, services, or construction. It is the intent of PHSI to conduct all procurement activities in compliance with Utah Procurement Code (Rule 33-10, Section 63G-6) and other federal or local purchasing guidelines. Procurement activities will be monitored by the Finance Committee. They will be responsible to ensure all policies are followed. Procurements shall be made using best value judgment based on quality, performance, and price. PHSI will adhere to the following objectives:

1. Make all purchases in the best interest of the school and its funding sources.
2. Purchases shall be constrained to the approved yearly budget amounts, except as otherwise outlined either here or in applicable budgetary statute.



3. Obtain quality supplies and services.
4. Purchase from responsible and dependable sources.
5. Obtain maximum value for all expenditures.
6. Deal fairly and impartially with all vendors.
7. Exhibit ethical behavior at all times. Avoid any conflict of interest.

## **Procurement Level Guidelines**

### **Level I**

- \$0 to \$1,000
- State contracts may be used if determined to be the best source.
- Direct purchase by department with Purchase Order Request.

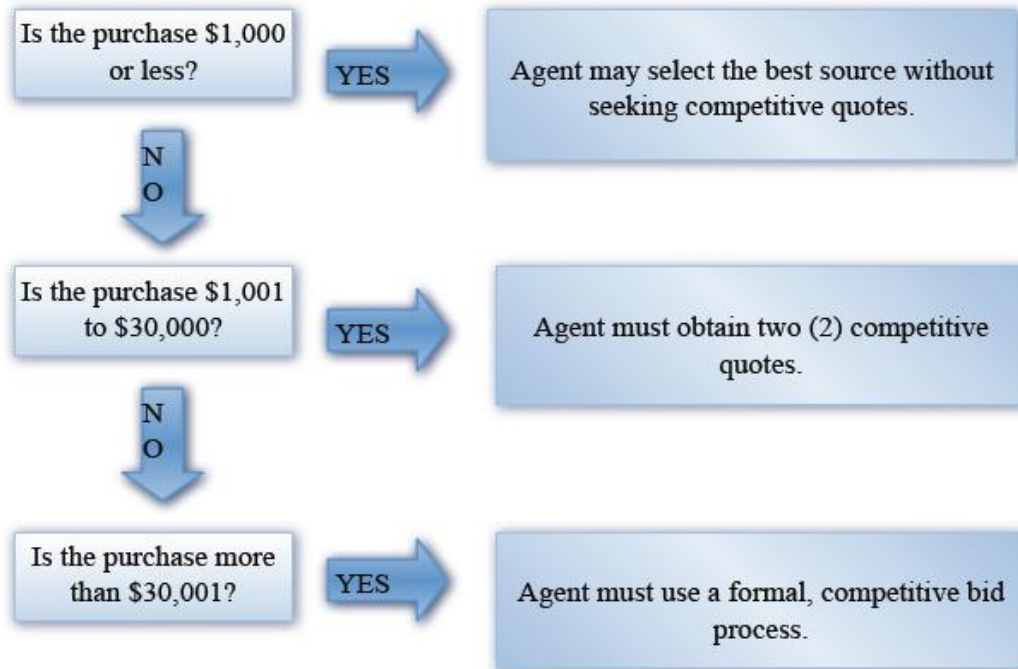
### **Level II**

- \$1,001 to \$30,000
- State contracts may be used if determined to be the best source.
- Authorized agent obtains two (2) competitive quotes. Details must be documented on Purchase Order Request.

### **Level III**

- \$30,001 and up
- State contracts may be used if determined to be the best source.
- Formal bid process is required. Obtain three (3) competitive bids. Use formal evaluation process. \$50,000 purchase and greater require approval of PHSI Board of Trustees.

## PHA Purchasing Guidelines



## PP&P for Facility Planning and Construction

Pacific Heritage Schools Board of Trustees does commit to adhere to all Purchasing Policies and Procedures when the time comes to participate in facilities planning, construction, and other high-value purchases. Any equipment or facility purchase or commitment for funds over the amount of \$30,000 will undergo a full legal Request For Proposal (RFP) process which will include public notification through local newspapers, a scoring committee that will evaluate the pros and cons of each bidder followed by approval of them through an open board meeting. PHA anticipates using a contractor developer and other professionals who will bring the most value to the school.

## School Finance and Statistics Trainings

Prior to working for Pacific Heritage Academy, at least one representative from the PHSI Finance Committee and the chosen Business Service Provider will have attended USOE School Finance & Statistics trainings regarding Minimum School Program and financial reporting requirements. It will also be required that they attend trainings provided by the state on a continuing basis in the future. The Board of Trustees understands, agrees, and supports the fact that there will always be an ongoing need to



stay abreast of the requirements of the state when handling public funds. The Board feels the utmost importance of being in compliance of all requirements to ensure that all fiscal matters are handled in the most responsible and ethical way.

### **Reimbursed Expenses**

The Finance Committee may approve and reimburse pre-approved employee expenses incurred by teachers and staff. Employees must submit dated, itemized receipts within 90 days along with the appropriate reimbursement form.

### **Petty Cash**

A petty cash fund of \$100 shall be maintained for emergency purposes only. Receipts and details of transactions shall be maintained. Petty cash balances must be reconciled weekly. Excess cash receipts which total to an amount greater than \$100 will be deposited.

### **Record Keeping**

The Finance Committee shall maintain appropriate supporting documentation for all bids (verbal and written), expenses, fund accounts, checks, and purchase orders, etc. Upon year-end analysis of the budget category Supplies (600), PHA will make adjustments, as needed, to capitalize any semi-permanent equipment. Expenditures in the Property (700) budget category will be capitalized at year end as required by third party auditors.



**Pacific Heritage Schools, Inc.**  
1050 W. Goosenest Dr.  
Elk Ridge, UT 84651  
Telephone: (801) 787-4021  
Email address: ofakm@yahoo.com

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**OPEN MEETING  
PACIFIC HERITAGE SCHOOLS BOARD OF TRUSTEES**

**Date:** February 10, 2010  
**Time:** 2:00 p.m.  
**Location:** 1050 W. Goosenest Dr.  
Elk Ridge, UT 84651

**MEETING MINUTES**

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- I. Call To Order:** Ofa Moea'i
- II. Board Attendance Roll Call:** Ofa Moea'i, Lose Tuinei, Isaac Ha'o, Valerie Varner, Richard Kaufusi, Cecilia Whitman.
- III. Public Attendance:** Malia Thurman, Mark Moea'i, Linda Kinikini.
- IV. Public Comment:** Charter volunteer Malia Thurman suggested reviewing more possible locations for school facilities. Charter volunteer Mark Moea'i suggested a commercial realtor in the Glendale/Salt Lake area.
- V. Approval of Agenda**
- VI. Chairman's Report:** Ofa announced that Daniel V. Kinikini and Norma Ballard, PHSI board members have resigned and three new members will be appointed today.
- VII. Committee Report(s)**
  - a. School Improvement:** Not applicable.
  - b. Policy:** Not applicable.
- VIII. Financial Report:** Ofa announced that Red Apple Financial is being considered as contractor. They will assist the board with the start-up and planning year budgets for PHA.
- IX. Administrator's Report(s):** Not applicable. PHA Director has not been hired yet.
- X. Old Business**





- a. **Target Population:** Ofa announced the changing of strategy focus from Pacific Islander [PI] youths at risk to PI youths strengths (i.e., graduation rates). Board favored the change.
  - XI. **New Business**
    - a. **Bylaws Discussion:** Ofa and Lose reviewed the bylaws for any changes. They summarized the bylaws and provided the board with a copy. Another bylaw discussion will take place at the March meeting.
  - XII. **Management Team:** Ofa reviewed the 'Terms and Conditions of Employment' and 'Employment of Relatives' policies (sections of the application), with the board. Isaac requested further clarification of the 'At-Will Status' policy.
  - XIII. **Consent Agenda:** Ofa announced the appointments of three new board members.
    - Action requested:** Motion to approve Richard Kaufusi, Isaac Ha'o and Valerie Varner as new members of the board. Vote by existing board members were unanimously approved.
    - Consent Agenda:** Ofa presented the board with bylaws for approval.
    - Action requested:** Motion to approve. Board members unanimously approved.
    - a. **Minutes of February 10, 2010** were unanimously approved.
    - b. **Policy:** Ofa reviewed the governing body and policies with the new board members.
  - XIV. **Extended Public Comment:** Not applicable.
  - XV. **Other Business:** Not applicable.
  - XVI. **Adjournment:** The meeting was adjourned at 4:38 p.m.
  - XVII. **Next Meeting:** The next board meeting will be held on March 10, 2010 at 1050 W. Goosenest Dr., Elk Ridge, UT 84651
- 

A copy of the meeting minutes is available for public inspection at Pacific Heritage Schools, Inc., 1050 W. Goosenest Dr., Elk Ridge, UT, 84651.

## SECTION 10

# ORGANIZATION STRUCTURE AND GOVERNING BODY

Pacific Heritage Schools is a domestic non-profit corporation located in the State of Utah.

### Trustees

#### **Essential Qualities of Trustees**

We have defined some qualities that a Pacific Heritage Schools Board Member should have to effectively work for the good of Pacific Heritage Academy and the families it serves. These include:

- A demonstrated interest in and dedication to the community where the school resides;
- A demonstrated interest in our target population of Pacific Islanders and the multicultural population of Salt Lake City;
- Professional expertise and/or personal experience in key areas related to our teaching methodology, curriculum, heritage languages, cultural preservation, and other goals and objectives of the school;
- Education, business and finance expertise to contribute to our organization.



## **Stewardship of Trustees**

The Board of Trustees is charged with protecting and implementing the Pacific Heritage Schools mission and philosophy as outlined by its founders in this charter and other supporting documents.

## **United Responsibilities**

Roles and responsibilities of all Board Members include, but are not limited to

- Protect the legal interests of Pacific Heritage Schools
- Determine school policy
- Exercise sound legal and ethical practices and policies
- Manage liabilities wisely
- Advocate good external relations with the community, school districts, media, neighbors, parents, and students
- Hire and evaluate the Administrative Site Team
- Practice strategic planning
- Ensure adequate resources
- Manage school resources effectively
- Assess the organization's performance

## **Specific Responsibilities**

In addition, certain positions on the Board have specific areas of oversight:

- The President, Secretary, and Treasurer direct the administrative affairs of the Board.
- Three Trustees direct Board affairs in each of the following areas and others as needed: Public Relations, School Management, Financial Health and Strategies, Educational Programs, and others as needed. These may be called the Trustee of Student and Family Services, the Trustee of Operations and Business Management, and the Trustee of Curriculum and Methodology, etc. These Trustees are charged with implementation and execution of the varied components of the mission statement.
- Additional appointees may serve as parent liaisons or in other special assignments to the Board.

## **Board Members**

The election, selection, terms of office, and removal of officers will be as follows:



## President

Method of selection: *Board Appointed*

Member type: *Any*

Initial term: *Begins on the Date of Incorporation and ends June 30, 2013.*

Length of tenure: *Three years, beginning with the second term*

Second term begins: *July 1, 2013*

Summary of position: *Board Leader*

Responsibilities: *Compliance with State Law, Representation to the State Charter School Board, Representation to the State Board of Education, Conducting PHSI Board meetings.*

## Secretary

Method of selection: *Board Appointed*

Member type: *Any*

Initial term: *Begins on the Date of Incorporation and ends June 30, 2012.*

Length of tenure: *Three years, beginning with the second term*

Second term begins: *July 1, 2012*

Summary of position: *Record keeper for the Board*

Responsibilities: *Record keeping (including minutes of PHSI Board meetings), Filing of paperwork, Announcement of public notices*

## Treasurer

Method of selection: *Board Appointed*

Member type: *Any*

Initial term: *Begins on the Date of Incorporation and ends June 30, 2011.*

Length of tenure: *Three years, beginning with the second term*

Second term begins: *July 1, 2011*

Summary of position: *Financial director for the Board*

Responsibilities: *Fiscal responsibility*

## Board Trustee at Large

Method of selection: *Board Appointed*

Member type: *Any*

Initial term: *Begins on the Date of Incorporation and ends June 30, 2011.*

Length of tenure: *1 year*

Summary of position: *Parent liaison*

Responsibilities: *Networking with parents, Coordinating family involvement*



#### Board Trustee of Curriculum and Methodology

Method of selection: *Board Appointed*

Member type: *Any*

Initial term: *Begins on the Date of Incorporation and ends June 30, 2013.*

Length of tenure: *Three years, beginning with the second term*

Second term begins: *July 1, 2013*

Board affairs to direct: *Educational programs*

Areas of Responsibility: *Curriculum, Assessment, Methodology, Faculty programs*

#### Board Trustee of Operations and Business Management

Method of selection: *Board Appointed*

Member type: *Any*

Initial term: *Begins on the Date of Incorporation and ends June 30, 2012.*

Length of tenure: *Three years, beginning with the second term*

Second term begins: *July 1, 2012*

Board affairs to direct: *School management*

Areas of Responsibility: *School lunch, Facilities, Et cetera*

#### Board Trustee of Student and Family Services

Method of selection: *Board Appointed*

Member type: *Any*

Initial term: *Begins on the Date of Incorporation and ends June 30, 2011.*

Length of tenure: *Three years, beginning with the second term*

Second term begins: *July 1, 2011*

Board affairs to direct: *Public Relations*

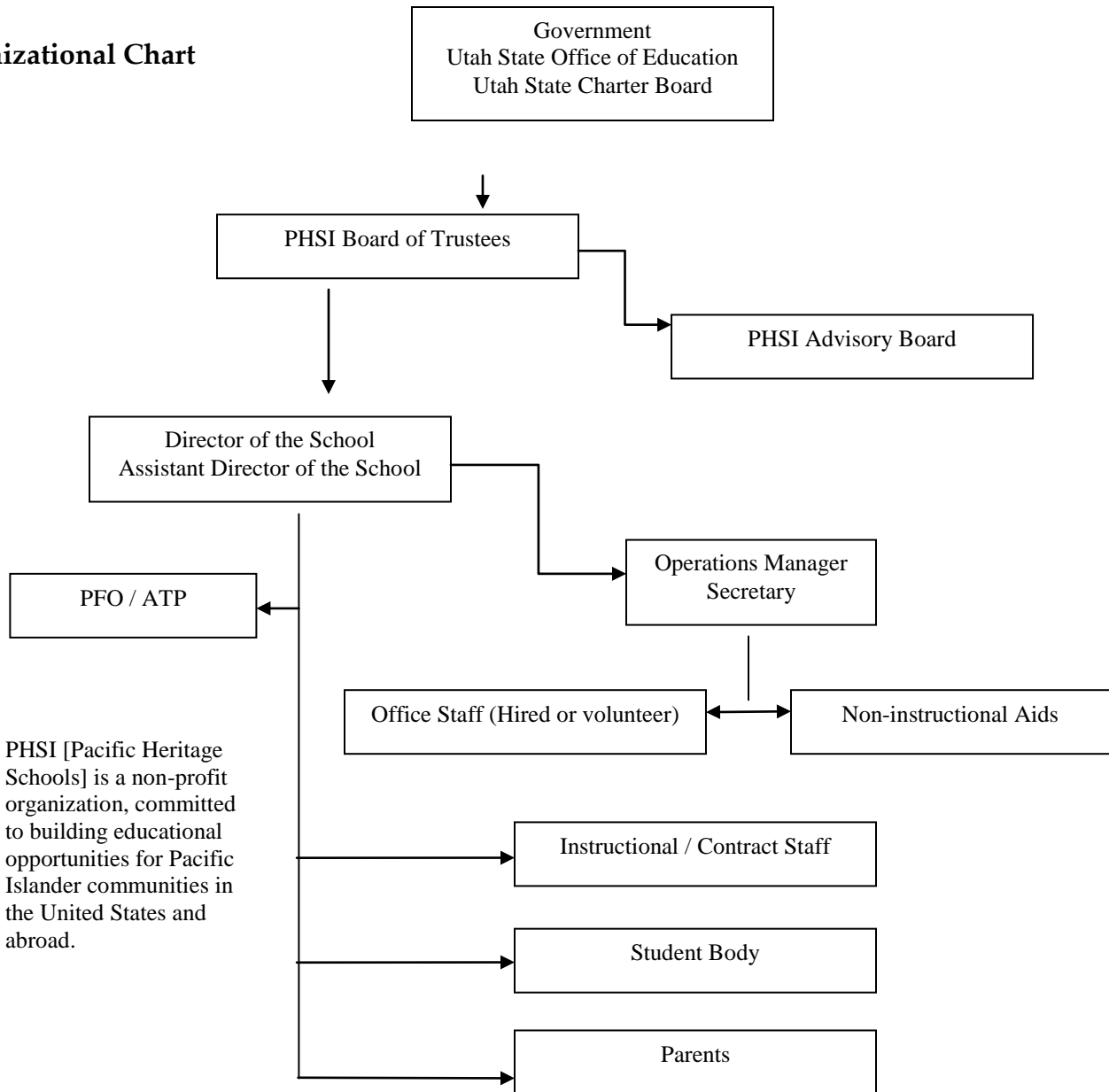
Area of Responsibility: *Enrollment, Special Needs, Marketing, Public Relations, Advertising, Media*

### **Board Communications**

The flow of information in any organization is the key to successful relationships and cooperative efforts. For Pacific Heritage Schools, the following communication processes and systems have already begun to be employed as we grow our community of learners in the early stages of developing the Academy. These methods and outreach efforts are proving to be effective in initiating interest in educational issues and preparing to enter the community as a culturally sensitive provider of needed educational services. We understand that as we move forward and expand our influence we will have need for additional ways of guiding the successful communication of information to all stakeholders as well as between partnerships

formed between the school and other entities. We stand ready to explore and find effective routes of communicating with our community within and outside of school. (See attached flow chart.)

### Organizational Chart



### A Communicating Board of Trustees

We follow Utah open meeting laws, have a parent liaison serving on the Board, and have an open door policy for all stakeholders in our community to approach Board members with ideas and concerns. Board officers have assignments to particular areas of concern (Facilities and Operations, Educational Programs, Student Life, Community



Relations, etc.) which effectively channels concerns and ideas so that they can be resolved and considered for implementation respectively.

### **Communications between Board and Administrative Team**

Administrative team members are hired or contracted with are valued for their ability to see and carry forward the vision outlined in this charter proposal. This will enable Administrative personnel to see envision and implement Board directives more easily. The Board will also carefully select Administrative personnel for compatible strengths and cooperative relationships as team member. Administrative team members are valued for their effective communication skills among themselves.

### **Communications Outward**

Communications to families and community will include, but not be limited to, newsletters (in English and other languages as needed), the school website, internet mail between school personnel and parents, written communications sent home with students, etc. We feel these and other methods of communication are vital to the success of the school and to accomplishing our vision and mission.

### **Management Structure**

Our Board of Trustees intends to carefully select a team of compatible and cooperative administrators highly qualified to fulfill the duties necessary to the successful functioning of the school on a day to day basis. Our management team is described in detail in Section 20: Administrative Services.



**Non-Profit Corporation Articles  
ARTICLES OF INCORPORATION  
OF  
Pacific Heritage Schools**

**We, the undersigned natural persons all being of the age of eighteen years or more, acting as incorporators under the Utah Revised Nonprofit Corporation Act, adopt the following Articles of Incorporation for such Corporation:**

**Article I  
Name**

**The name of the corporation is Pacific Heritage Schools.**

**Article II  
Purpose**

To design, implement and manage charter schools to serve Pacific Islanders and multi-cultural students, with an emphasis on culture and language. To engage in any and all other lawful purposes, activities and pursuits, which are substantially similar to the foregoing and which are or may hereafter be authorized by Section 501(c)(3) of the Internal Revenue Code and are consistent with those powers described in the Utah Nonprofit Corporation and Cooperation Association Act, as amended and supplemented.

**Article III  
Name and Address of Registered Agent**

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

1050 W. Goosenest Dr  
Elk Ridge, UT 84651

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

Ofa K Moeai

**I hereby acknowledge and accept appointment as corporation registered agent:**

Ofa K Moeai

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**Signature**





**Article IV**  
**Names and Addresses of Incorporators**

**The name(s) and address(es) of the incorporators are:**

Incorporator #1  
Ofa K Moeai  
1050 W. Goosenest Dr  
Elk Ridge, UT 84651  
Ofa K Moeai (POA or AIF)

\_\_\_\_\_  
Signature

**In Witness Whereof I / We have executed these Articles of Incorporation on 25 3, 2009 and say:**

**That they are all incorporators herein; that they have read the above and foregoing Articles of Incorporation; know the contents thereof and that the same is true to the best of their knowledge and belief, excepting as to matters herein alleged upon information and belief and as to those matters they believe to be true.**

**Article V**  
**Members**

**The nonprofit corporation will have voting members.**

**Article VI**  
**Shares**

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

**Article VII**  
**Directors/Trustees**

**The name(s), address(es) and signature(s) of the director(s)/trustee(s) are:**



Trustee #1  
Ofa K Moeai  
1050 W. Goosenest Dr  
Elk Ridge, UT 84651

Trustee #2  
Cecilia Freda Whitman  
1112 E 470 S  
Payson, UT 84651

Trustee #3  
Lisiate "Richard" Ati Kaufusi  
1027 Emery St.  
Salt Lake City, UT 84104

### Article VIII

**The period of duration of this corporation is perpetual**

### Article IX

#### **Principal Place of Business**

**The street address of the principal place of the business is:**

1050 W Goosenest Dr  
Elk Ridge, UT, 84651



State of Utah  
Department of Commerce  
Division of Corporations & Commercial Code

This certifies that this registration has been filed and approved on 25, March 2009 in the office of the Division and hereby issues this Certification thereof.

KATHY BERG  
Division Director

**Under GRAMA {63-2-201}, all registration information maintained by the Division is classified as public record. For confidentiality purposes, the business entity physical**



**address may be provided rather than the residential or private address of any individual affiliated with the entity.**



**Pacific Heritage Schools, Inc. (PHSI)**  
**BYLAWS**

ARTICLE I	Offices
Section 1.1	Business Offices
Section 1.2	Registered Offices
ARTICLE II	Members
Section 2.1	Classification & Election of Members
ARTICLE III	Board of Trustees
Section 3.1	General Powers
Section 3.2	Numbers, Election, Tenure and Qualifications, Voting
Members	
Section 3.3	Numbers, Election, Tenure and Qualifications, Non-voting
Members	
Section 3.4	Vacancies
Section 3.5	Regular Meetings
Section 3.6	Special Meetings
Section 3.7	Notice
Section 3.8	Quorum and Voting
Section 3.9	Manner of Acting
Section 3.10	Meetings by Telephone
Section 3.11	Action without a Meeting
Section 3.12	Presumption of Assent
Section 3.13	Compensation
Section 3.14	Executive and Other Committees
ARTICLE IV	Officers and Agents
Section 4.1	Number and Qualifications
Section 4.2	Election and Term of Office
Section 4.3	Removal
Section 4.4	Vacancies



Section 4.5 Authority and Duties of Officers  
Section 4.6 Surety Bonds

ARTICLE V Indemnification

Section 5.1 Indemnification of Trustees, Officers, Etc.  
Section 5.2 Indemnification against Liability to Corporation  
Section 5.3 Indemnification to Criminal Actions  
Section 5.4 Other Indemnification  
Section 5.5 period of Indemnification  
Section 5.6 Insurance  
Section 5.7 Right to Impose Conditions to Indemnification  
Section 5.8 Limitation on Indemnification

ARTICLE VI Miscellaneous

Section 6.1 Account Books, Minutes, Etc.  
Section 6.2 Fiscal Year  
Section 6.3 Conveyances and Encumbrances  
Section 6.4 Designated Contributions  
Section 6.5 Conflicts of Interest and Discrimination  
Section 6.6 Loans to Trustees and Officers Prohibited  
Section 6.7 References to Internal Revenue Code  
Section 6.8 Amendments  
Section 6.9 Severability



## ARTICLE I

### OFFICES

**Section 1.1 Business Offices.** The principal office of the corporation shall be located in the city of Elk Ridge and the county of Utah. The corporation may have such other offices either within or outside Utah, as the Board of Trustees may designate or as the affairs of the corporation may require from time to time.

**Section 1.2 Registered Office.** If a registered office of the corporation is required to be maintained in Utah, it may be, but need not be, the same as the principal office, if in Utah, and the address of the registered office may be changed from time to time by the board of trustees.

## ARTICLE II

### MEMBERSHIP

**Section 2.1 Classification & Election of Members.** The corporation shall have no members.

## ARTICLE III

### BOARD OF TRUSTEES

**Section 3.1 General Powers.** The business and affairs of Pacific Heritage Schools shall be managed by its Board of Trustees, except as otherwise provided in the Utah Nonprofit Corporation and Co-operative Association Act, the articles of incorporation or these bylaws.

**Section 3.2 Number, Election, Tenure and Qualifications for Voting Board Members.** The number of trustees of the Corporation shall be fixed by the Board of Trustees, but in no event shall be less than 3 and no more than 9, with an expectation of 7 as the desired usual. Any action of the Board of Trustees to increase or decrease the number of trustees, whether expressly by resolution or by implication through the election of additional trustees, shall constitute an amendment of these bylaws effecting such increase or decrease.

Trustees shall be appointed or reappointed by a majority of the existing Board of Trustees at each June annual meeting. Board terms shall end on June 30th of the respective term.



New board members shall not serve on the board for more than two 2-year terms after which they may be re-elected to the Board only after at least a one year sabbatical.

Any trustee who has 2 or more unexcused absences at board meetings and/or does NOT complete assignments regularly to the satisfaction of the Board, having been given due notice, shall be subject to removal if the remaining Board so deems by a majority vote. Regardless of the foregoing, any Trustee may be removed by a majority vote of the Board of Trustees whenever in its judgment the best interests of the corporation will be served thereby, but such removal shall be without prejudice, if any, of the person so removed.

Each Board Member shall be required to attend a national conference or other training sponsored by Expeditionary Learning or other organization within his or her first two years of tenure. These trainings are considered effective means of training Board Members in the core concepts of the teaching methodology of Pacific Heritage Academy. These will be part of MOU agreements each year, and includes conference fee, travel and lodging. Board members may be asked to pay for their own food costs.

**Section 3.3 Number, Election, Tenure and Qualifications of Advisory Board Members (Non-Voting Board Members).** The number of Advisory Board members shall be at the discussion of the Board of Trustees. Advisory Board members shall be appointed or reappointed by a majority of the voting Board Members at each annual June meeting or as otherwise determined by the Board. Advisory Board members shall serve an indefinite term and shall make an effort to attend as many board meetings as they are able. Advisory Board members may be removed at any time by a majority of Voting Board Members.

**Section 3.4 Vacancies** Any trustee may resign at any time by giving written notice, either paper or electronic, to the chair of PHSI. Such resignation shall take effect at the time specified therein, and unless otherwise specified, the acceptance of such resignation shall not be necessary to make it effective. The Board shall publicly announce the number of vacancies available and shall consider any nominations from parents or the community at large. Vacancies shall be filled by the affirmative vote of a majority of the trustees then in office.

**Section 3.5 Regular Meetings and Attendance.** Regular meetings of the board of trustees shall be held at least 4 times each year. It is the Board's desire to provide notice for such meetings at least one week in advance, but may hold a meeting with 24 hour



notice. An annual meeting shall be held each year in June. Board meetings will remain open to the public unless a closed session is convened by a majority vote of members present; which closed session will be subject to the requirements of Utah State Open Meetings Laws.

**Section 3.6 Special Meeting.** Special meetings of the Board of Trustees may be called by or at the request of the chair or any two trustees. The person or persons authorized to call special meetings of the board of trustees will provide proper notice and may fix any place, date and time for holding any special meeting of the board called by them; which special meeting will follow normal open meeting requirements as outlined by the State of Utah.

**Section 3.7 Notice.** Notice of each meeting of the board of trustees stating the place, day and hour of the meeting shall be given to each trustee at his or her business or home address at least 24 hours prior to thereto by mailing of written notice by first class, certified or registered mail or by personal delivery of written notice or by telephone notice or by email (the method of notice need not be the same to each trustee). If mailed, such notice shall be deemed to be given when deposited in the US mail, with postage thereon prepaid. If emailed, such notice shall be deemed to be given when the email is sent. Any trustee may waive notice of any meeting before, at or after such meeting. The attendance of a trustee at a meeting shall constitute a waiver of notice of such meeting, except where a trustee attends a meeting for the express purpose of objecting to the transaction of any business because the meeting was not lawfully called or convened.

**Section 3.8 Quorum and Voting.** A majority of the number of trustees fixed by section 2 of this Article III shall constitute a quorum, but if less than such majority is present at a meeting, a majority of the trustees present may adjourn the meeting from time to time without further notice than an announcement at the meeting, until a quorum shall be present. No trustee may vote or act by proxy at any meeting of trustees.

**Section 3.9 Manner of Acting.** The act of the majority of the trustees present at a meeting at which a quorum is present shall be the act of the board of trustees.

**Section 3.10 Meetings by Telephone or other Electronic Device.** Members of the board of trustees or any other committee thereof may participate in a meeting of the board or committee by means of conference telephone or similar communications equipment. Such participation shall constitute presence in person at the meeting.





**Section 3.11 Action Without a Meeting.** All official actions of the board must be done in a public meeting in accordance with Utah State law.

**Section 3.12 Presumption of Assent.** A trustee of PHSI who is present at a meeting of the board of trustees at which action on any corporate matter is taken shall be presumed to have assented to the action taken unless his dissent is entered in the minutes of the meeting, or unless he files his written dissent to such action with the person acting as the secretary of the meeting before the adjournment thereof or shall forward such dissent by registered mail to the secretary of the corporation immediately after the adjournment of the meeting. Such right to dissent shall not apply to a trustee who voted in favor of such action.

**Section 3.13 Compensation.** Trustees shall not receive compensation for their service on the board, although the reasonable expenses relating to the furtherance of the corporation's mission may be paid or reasonable compensation paid for services rendered in the furtherance of the corporation's mission outside of service on the Board of Trustees, but only in accordance to Utah State Law.

**Section 3.14 Executive and Other Committees.** By one or more resolutions, the board of trustees may designate from among its members an executive committee and one or more other committees.

## ARTICLE IV

### OFFICERS AND AGENTS

**Section 4.1 Number and Qualifications.** The Officers of PHSI shall be a chair, a vice-chair, secretary and a treasurer. The Board of trustees may also elect or appoint such other officers, assistant officers and agents, including an executive director, one or more vice-chairs, a controller, and assistant secretaries as it may consider necessary. One person may hold more than one office at a time, except that no person may simultaneously hold the offices of chair and secretary or chair and treasurer or secretary and treasurer. Officers need not be trustees of the corporation. All officers must be at least eighteen years old.

**Section 4.2 Election and Term of Office.** Officers of the Board of PHSI shall be elected by the board of trustees at the regular annual meeting of the board of trustees. If the election of officers shall not be held at such meeting, such election shall be held as soon as convenient thereafter. Officers shall hold office for 2-year terms with the opportunity to be elected again to the same position.



**Section 4.3 Removal.** Any officer or agent may be removed by a majority vote of the board of trustees whenever in its judgment the best interests of the corporation will be served thereby, but such removal shall be without prejudice to the contract rights, if any, of the person so removed. Election or appointment of an officer or agent shall not in itself create contract rights.

**Section 4.4 Vacancies.** Any officer may resign at any time, subject to any rights or obligation under any existing contracts between the officer and the corporation, by giving written notice to the chair or the board of trustees. An officer's resignation shall take effect at the time specified in such notice, and unless otherwise specified therein, the acceptance of such resignation shall not be necessary to make it effective. A vacancy in any office, however occurring, may be filled by the board of trustees for the un-expired portion of the term.

**Section 4.5 Authority and Duties of Officers.** The officers of the corporation shall have the authority and shall exercise the powers and perform the duties specified below and as may be additionally specified by the chair, the board of trustees or these bylaws, except that in any event each officer shall exercise such powers and perform such duties as may be required by law.

- (a) **Chair.** The chair shall, subject to the direction and supervision of the board of trustees: (1) **preside** at all meetings of the board of trustees; (2) see that all orders and resolutions of the board of trustees are carried into effect; and (3) perform the duties of the chair and when so acting shall have all the powers of and be subject to all the restrictions upon the chair.
- (b) **Vice-Chair.** The vice-chair shall **assist** the chair and shall perform such duties as may be assigned by the chair or by the board of trustees. The vice-chair shall, at the request of the chair, or in his absence or inability to act, perform the duties of the chair and when so acting shall have all the powers of and be subject to all the restrictions upon the chair.
- (c) **Secretary.** The secretary shall: (1) **keep the minutes** of the proceedings of the board of trustees and any committees of the board; (2) see that all **notices** are duly given in accordance with the provisions of these bylaws or as required by law; (3) be custodian of the **corporate records** and of the seal of the corporation; and (4) in general, perform all duties incident to the office of secretary and such other duties as from time to time may be assigned to him/her by the chair or by the board of trustees. Assistant secretaries, if any,



shall have the same duties and powers, subject to supervision by the secretary.

- (d) Treasurer. The treasurer shall: (1) be the **principal financial officer** of the corporation and have the care and custody of all its funds, securities, evidences of indebtedness and other personal property and deposit the same in accordance with the instructions of the Board of Trustees; (2) receive and give receipts and a quittances for moneys paid on account of the corporation, and pay out of the funds on hand all bills, payrolls and other just debts of PHSI of whatever nature upon maturity; (3) unless there is a controller, be the principle accounting officer of the corporation and as such prescribe and maintain the methods and systems of accounting to be followed, **keep complete books and records of account**, prepare and **file all local , state and federal tax returns** and related documents, **prescribe and maintain an adequate system of internal audit**, and prepare and furnish to the chair and the board of trustees **statements of accounts** showing the financial position of PHSI and the results of its operations; (4) upon request of the board, make such reports to it as may be required at any time; and (5) perform all other duties incident to the office of treasurer and other such duties as from time to time may be assigned to him/her by the chair of the board of trustees. Assistant treasures, if any, shall have the same powers and duties, subject to supervision by the treasurer.

**Section 4.6 Surety Bonds** The board of trustees may require any officer or agent of the corporation to execute to the corporation a bond in such sums and with such sureties as shall be satisfactory to the board, conditioned upon the faithful performance of his/her duties and for the restoration of PHSI of all books, papers, vouchers, money and other property of whatever kind in his possession or under his control belonging to the PHSI.

## ARTICLE V INDEMNIFICATION

**Section 5.1 Indemnification of Trustees, Officers, etc.** The corporation hereby declares that any person who serves at its request as a trustee, officer, employee, chairperson or member of any committee, or on behalf of the PHSI as a trustee, director or officer of another corporation, whether for profit, shall be deemed the corporation's agent for the purposes of this Article and shall be indemnified by PHSI against expenses (including attorney's fees), judgments, fines, excise taxes, and amounts paid in

settlement actually and reasonably incurred by such person who was or is a party or threatened to be made a party to any threatened, pending or completed action, suit or proceeding, whether civil, criminal, administrative or investigative by reason of such believed to be in the best interests of the PHSI and, with respect to any criminal action or proceeding, had no reason of such service, provided such person acted in good faith and in a manner she/he reasonably believed to be in the best interests of PHSI and, with respect to any criminal action or proceeding, had no reasonable cause to believe his conduct was unlawful. Except as provided in Section 5.3, termination of any such action, suit or proceeding by judgment, order, settlement, conviction or upon a plea of no contender or its equivalent, shall not of itself create either a presumption that such person did not act in good faith and in manner which he reasonably believed to be in the best interests of the corporation. With respect to any criminal action or proceeding, a presumption that such person had reasonable cause to believe that his conduct was unlawful.

**Section 5.2 Indemnification Against Liability to the Corporation.** No indemnification shall be made in respect of any claim, issue matter as to which a person covered by Section 5.1 shall have been adjudged to be liable for negligence or misconduct in the performance of his duty to the corporation unless and only to the extent that the court in which such action, suit or proceeding was brought shall determine upon application that, despite the adjudication of liability but in view of all the circumstances of the case, such person is fairly and reasonably entitled to indemnification for such expenses which such court shall deem proper.

**Section 5.3 Indemnification in Criminal Actions.** No indemnification shall be made in respect of any criminal action or proceeding as to which a person covered by Section 5.1 shall have been adjudged to be guilty unless and only to the extent that the court in which such action or proceeding was brought shall determine upon application, that despite the adjudication of guilt but in view of all the circumstances of the case, such person is entitled to indemnification for such expenses or fines which such court shall deem proper.

**Section 5.4 Other Indemnification.** The indemnification provided by this Article shall not be deemed exclusive of any other rights to which any person may be entitled under the articles of incorporation, any agreement, any other provision of these bylaws, vote of the disinterested trustees or otherwise, and any procedure for by any of the foregoing, both as to action in his official capacity and as to action in another capacity while holding such office.



**Section 5.5 Period of Indemnification.** Any indemnification pursuant to this Article shall (a) be applicable to acts or omissions which occurred prior to the adoption of this Article, and (b) continue as to any indemnified party who has ceased to be a trustee, officer employee or agent of the corporation. The repeal or amendment of all or any portion of these bylaws which would have the effect of limiting, qualifying or restricting any of the powers or rights of indemnification provided or permitted in this Article shall not, solely by reason of such repeal or amendment, eliminate, restrict or otherwise affect the right or power of the corporation to indemnify any person or affect any right of indemnification so such person, with respect to any acts or omissions which occurred prior to such repeal or amendment.

**Section 5.6 Insurance.** By action of the Board of Trustees, notwithstanding any interest of the trustees in such action, PHSI may, subject to Section 5.8, purchase and maintain insurance, in such amounts as the board may deem appropriate, on behalf of any person indemnified hereunder against any liability asserted against him/her and incurred by him/her in the capacity of or arising out of his/her status as a agent of the corporation, whether or not the corporation would have the power to indemnify him/her against such liability under applicable provisions of law. The corporation may also purchase and maintain insurance, in such amounts as the board may deem appropriate, to insure PHSI against any liability, including without limitation, any liability for the indemnification provided in this Article.

**Section 5.7 Right to Impose Conditions to Indemnification.** The corporation shall have the right to impose, as conditions to any indemnification provided or permitted in this Article, such reasonable requirements and conditions as the board or trustees may deem appropriate in each specific case, including by not limited to any one or more of the following: (a) that any counsel representing the person to be indemnified in connection with the defense or settlement of any action shall be counsel that is mutually agreeable to the person to be indemnified and to the corporation; (b) that PHSI shall have the right, at its option, to assume and control the defense or settlement of any claim or proceeding made, initiated or threatened against the person to be indemnified; and (c) that PHSI shall be surrogated, to the extent of any payments made by way of indemnification, to all of the indemnified person's right of recovery, and that the person to be indemnified shall execute all writings and do everything necessary to assure such rights of subornation to PHSI.

**Section 5.8 Limitation of Indemnification.** Notwithstanding any other provision of these bylaws, PHSI shall neither indemnify any person nor purchase any insurance in any manner or to any extent that would jeopardize or be inconsistent with qualification of the corporation as an organization described in section 501(c)(3) of the Internal



Revenue Code or would result in liability under section 4941 of the Internal Revenue Code.

## Article VI

### MISCELLANEOUS

**Section 6.1** Account Books, Minutes, Etc. The corporation shall keep correct and complete books and records of account and shall also keep minutes of the proceedings of its board of trustees and business meetings of officers. All books and records of the corporation may be inspected by any trustee or his accredited agent or attorney, for any proper purpose at any reasonable time.

**Section 6.2** Fiscal Year. The fiscal year of the corporation shall be July 1 to June 30.

**Section 6.3** Conveyances and Encumbrances. Property of the corporation may be assigned, conveyed or encumbered by such officers of the corporation as may be authorized to do so by the board of trustees, and such authorized persons shall have power to execute and deliver any and all instruments of assignment, conveyance and encumbrance; however, the sale, exchange, lease or other disposition of all or substantially all of the property and assets of the corporation shall be authorized only in the manner prescribed by applicable statute.

**Section 6.4** Designated Contribution. The corporation may accept any designated contribution, grant, and bequest or devise consistent with its general tax-exempt purposes, as set forth in the articles of incorporation. As so limited, donor-designated contributions will be accepted for special funds, purposes or uses, and such designations generally will be honored. However, the corporation shall reserve all rights, title and interest in and to and control of such contributions, as well as full discretion as to the ultimate expenditure or distribution thereof in connection with any special fund, purpose or use. Further, the corporation shall retain sufficient control over all donated funds (including designated contributions) to assure that such funds will be used to carry out the corporation's tax-exempt purpose.

**Section 6.5** Conflicts of Interest. If any person who is a trustee or officer of the corporation is aware that the corporation is about to enter into any business transaction directly or indirectly with himself, any member of his family, or any entity in which he has any legal, equitable or fiduciary interest or position, including without limitation as a trustee, officer, shareholder, partner, beneficiary or trustee, such person shall (a)



immediately inform those charged with approving the transaction on behalf of the corporation of his interest or position, (b) aid the persons charged with making the decision by disclosing any material facts within his knowledge that bear on the advisability of such transaction from the standpoint of the corporation, and (c) not be entitled to vote on the decision to enter into such transaction.

**Discrimination:** PHSI admits students of any race, religion, color, national origin, and ethnic origin to all the rights, privileges, programs, and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, religion, color, national origin, and ethnic origin in administration of its educational policies, admission policies, scholarship and loan programs, and athletic and other school-administered programs.

**Section 6.6 Loans to Trustees and Officers.** No loans shall be made by the corporation to any of its trustees or officers nor accepted from trustees, officers or agents of the corporation. Any trustee or officer who assents to or participates in the making of such loan shall be liable to the corporation for the amount of such loan until it is paid.

**Section 6.7 References to Internal Revenue Code.** All references in these bylaws to provisions of the Internal Revenue Code are to the provisions of the Internal Revenue Code of 1954, as amended and shall include the corresponding provisions of any subsequent federal tax laws.

**Section 6.8 Amendments.** The power to alter, amend or repeal these bylaws and adopt new bylaws shall be vested in the board of trustees; and shall require that every Board Member vote with at least a  $\frac{3}{4}$  majority vote for passage.

**Section 6.9 Severability.** The invalidity of any provisions of these bylaws shall not affect the other provisions hereof, and in such event these bylaws shall be construed in all respects as such invalid provisions were omitted.

## SECTION 11

# BACKGROUND INFORMATION SHEETS

Provide the following information on the authorized agent, each governing body member, and any individuals responsible for the day-to-day operation of the school. Complete this form, do not include a resume. This page may be copied as many times as necessary.\*

Name: Ofa Moeai  
Role in School (list positions with school): Board Member

### **Statement of Intent**

I have been involved with the charter school movement in both California and Utah. I have played the roles of parent, an elected board member, and as an administrator. Through these experiences I have felt a responsibility to assist in bringing the great opportunity of charter schools to the Pacific Islander communities of Utah. I have a great hope for a school as outlined in the application and plan to assist as a board member providing vision, direction and support as the school moves forward.

### **Not-for-Profit History**

Using as much space as necessary below, please provide your not-for-profit history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and





experiences as they relate to the operation of a non-profit corporation, governing board experience, and background in group organization.

I was elected by fellow parents to the Board of a Utah charter school in the spring of 2007 and served as CAO until the end of the year 2008. During my tenure there I dealt with budgeting and finance issues, creation of policies and procedures, building developers and the negotiation and purchase of the school facility, as well as fund raising plans and curriculum assessment. I was instrumental in bringing in a new teaching model as a strategy to strengthen our outcomes for learning as well as our position in the current education market. I enjoyed the challenge of leadership, representing parents, and being a steward of the public trust.

### **Employment History**

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

My background is largely in the Education and Health fields. I spent 4 years as a university mental health counselor and adjunct professor and 4 years as a medical social worker in emergency departments, inpatient hospital settings, and clinics.

My work experience in the charter school setting includes employment as an assistant director of a Utah Charter School with assignments to the secondary grades. I was assigned to oversee curriculum implementation, design curricular plans, assist with discipline, provide teacher support and resources, plan and implement student experiences, and other administrative duties.

I co-founded a for-profit business which provides placement services for health care professionals nationally and locally. In the beginning stages of this business I handled the marketing and business credit responsibilities in addition to providing supervision and training to consultants subcontracting with our business. I also negotiated contracts with clients and assisted candidates with career counseling and resources.

### **Education History**

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.



I attended public schools in Hawaii and Utah, graduating from Spanish Fork High School in Spanish Fork, Utah. I received a bachelor's degree from the University of Utah with a major in Sociology and a Master of Social Work degree with a clinical focus from Brigham Young University. I consider myself a life-long learner and take every opportunity to learn and grow.



## Background Information

Provide the following information on the authorized agent, each governing body member, and any individuals responsible for the day-to-day operation of the school. Complete this form, do not include a resume. This page may be copied as many times as necessary.\*

Name: Cecilia F. Whitman  
Role in School (list positions with school): Board Member

### Statement of Intent

I intend to be a supportive member of the board lending my skills as needed. When the school is fully operational, my intention is to over-see the cultural programming.

### Not-for-Profit History

Using as much space as necessary below, please provide your not-for-profit history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the operation of a non-profit corporation, governing board experience, and background in group organization.

For the last two years I have been the chairman of a Relay for Life community fundraising event in southern Utah County called "Luau for a Cure". I have the responsibility of organizing a large group of friends and neighbors in raising funds throughout the year and then recruit community members to lend their talents and cultural talents to perform at our culminating event, a luau and Polynesian cultural display of song and dance.

I have also organized a Youth Talent Showcase for the City of Payson as part of their annual Onion Days Celebration for five (5) consecutive years now. I recruit local talent, organize the program, publicize the event in cooperation with other city events, and recruit adult volunteers to organize the performance details as well as give out prizes, certificates, and judge the event.

### Employment History

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.



I have owned, operated and managed my own business, Heimana Production (Utah) since September 2006. I personally handle all the financial affairs of Heimana Production and work with my accountant in making sure taxes and other business fees are taken care of. I oversee the staff of four volunteer adults, who assist me in the operation of my business with 20+ students. Heimana Production is a Polynesian dance troupe that is open to young people regardless of ethnic background or disabilities. Students are instructed weekly in dance technique, culture, and language from the islands of Hawai'i, Tonga, Samoa, Tahiti/Cook, New Zealand (Aotearoa), Tokelau and Fiji. The curriculum that I have created is based on the knowledge that has been passed down from my elders to me and upon my own personal experiences as a professional Polynesian dance performer. Each month, students focus on one Polynesian island and they are taught the basic dance skills, basic language and local customs of that island.

Presently, I'm a Multi-Cultural Dance Instructor at Liberty Academy Charter School in Salem, Utah for grades 4th through 8th. I have 60+ students who are taught the same method/curriculum of Heimana Production (Utah). Prior to operating my own business, I worked as an after-school instructor for Barnett Elementary School in Payson, Utah through the Nebo School District, teaching Polynesian dance to students. Previous to that, I was a volunteer dance instructor for California Charter Academy in Hesperia, California instructing students in not only in Polynesian dancing, but in Hip Hop as well.

### **Education History**

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

I was born in one of these Polynesian islands – Samoa, where I was raised in a family that was always involved in music and dancing. My parents, grandparents and all of my mother's siblings were musicians, singers and dancers. It was there at a very young age that I was taught my culture and its arts. When I was seven, my family and I relocated to California and where I would further my dancing skills and education of other Polynesian cultures. Because of this knowledge I have grown a deep love for the Polynesian culture. This culture helped mold who I am today.

I have now been teaching Polynesian dance for 20 years and have been dancing professionally for over 30 years. My greatest desire is to share my culture with others in



hopes of helping them understand that though we may be different people with a different way of life, we still share a few common things... and that is... Love and respect for God, our families, for others and the world around us - nature. These common values are the basis of our culture, our way of life. It is the basis for our stories, songs and dances.

I attended community college prior to raising my family. I plan on completing my degree as time permits in the future. In the meantime, I have obtained a wonderful and varied education as I have run my own business for 4 years and assisted my husband in running his successful business for 6 years. I am a lifelong learner and take all life experiences as educational opportunities to learn and grow.

\*The information provided will be subject to verification by the board.



## Background Information

Provide the following information on the authorized agent, each governing body member, and any individuals responsible for the day-to-day operation of the school. Complete this form, do not include a resume. This page may be copied as many times as necessary.\*

Name: Lisiata "Richard" A. Kaufusi  
Role in School (list positions with school): Board Member

### Statement of Intent

I echo Plato's thoughts that *Necessity is the mother of all invention*. My commitment is in the necessity of bringing learning and education to Pacific Islanders who are not or unable to take advantage of the education resources afforded them. I will support the creation of the school and would like to be considered for employment by the Board at some time in the future.

### Not-for-Profit History

Using as much space as necessary below, please provide your not-for-profit history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the operation of a non-profit corporation, governing board experience, and background in group organization.

My teaching experience has been at both the high school and community college levels. I am currently in administration at the local university. I've been on numerous community boards and education boards. Currently, serve on the Steering Committee for two libraries to be erected in the Glendale and Rose Park areas. I have been involved with non-profits and have worked within these types of organizations for many years. I've also created non-profits at the grass-roots level and also with college students.

Often overlooked is the ecclesiastical not-for-profit sector. I have given service and been in leadership positions in my church for many years. Currently I have stewardship over multiple congregations including leadership development and support, auxiliary support, handling the financial and reconciliatory quarterly needs of these units.



### **Employment History**

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

Most of my employment history has been within the non-profit and educational sectors. My graduate work has been in Educational Leadership & Policy. My internships were in local high schools as an administrator. I oversaw the financials of these institutions as well as faculty & staff & student culture. As a teacher, I've created a curriculum to teach languages, humanities, physical education and oversaw its implementation. I currently oversee and manage scholarships for the U's School of Business. I've coached at the high school and college level.

### **Education History**

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

AA/AAS	General Education & Aviation Technology	Dixie College – '88
BA	English	BYU – '92
MS	Educational Leadership & Policy	UofU – '10

\*The information provided will be subject to verification by the board.



## **Background Information**

Provide the following information on the authorized agent, each governing body member, and any individuals responsible for the day-to-day operation of the school. Complete this form, do not include a resume. This page may be copied as many times as necessary.\*

Name: Nephi Aiono  
Role in School (list positions with school): Board Member

### **Statement of Intent**

### **Not-for-Profit History**

### **Employment History**

### **Education History**

\*The information provided will be subject to verification by the board.



## SECTION 12

# COMPREHENSIVE PROGRAM OF INSTRUCTION

### *A Craft and a Tradition: Weaving a Strong and Useful Culture of Education*

The traditional craft of weaving can be found in many world cultures, including those of the Pacific Islands. For many indigenous peoples, this skill enables or creates products (baskets, blankets, mats, clothing, etc.) essential to living and participating in their societies. Weaving also interplays with other cultural traditions to create and perpetuate a culture and way of life. Weaving can therefore be used as a metaphor for our plan for instruction at Pacific Heritage Academy because it describes *the craft*- how education happens at our school and because the *education process itself* is the tradition we desire to perpetuate or weave into the culture and way of life of our students and their families.



Our program involves the careful folding, layering, and tying of several components together to form an innovative and comprehensive educational offering. Education and authentic learning takes place as parents, teachers and students together weave core knowledge, skills and opportunities into powerful learning experiences which will change the lives of our students. This woven craft, our comprehensive program of instruction, will meet or exceed Utah State Standards and accomplish our mission to reach Utah’s Pacific Islanders and many others with a unique and effective choice in education. The following is a description of our program which begins with the Utah State Core Curriculum.



### *A Frame for Weaving: The Social Studies*

Our approach to delivering a powerful education to our students is to reorganize the Utah State Core Curriculum into thematic units based on social studies (also known as “Global Studies”, “Cultural Studies” , or “Heritage Studies”) topics and issues. These units (called “Learning Expeditions”) make the school day exciting, engaging, cohesive, memorable and motivating. They also deeply utilize the unique talents, passions, and

creativity of teachers. Expeditions enable teachers to individualize teaching to the needs, interests, and ideas of the students. Our choice to use social studies as the foundation or framework for weaving educational experiences in the classroom makes sense for a number of reasons. In her book *Seeing the Whole Through Social Studies*, author Tarry Lindquist outlines multiple points which show why social studies is a worthy framework for weaving learning experiences. Lindquist's urging gives us confidence in using social studies as a framework for our educational offering. The following ideas have inspired us deeply:

- 1. *Social studies are about life—allowing the natural integration of a wide range of subjects and skills.*** Social studies is a living, breathing topic; expanding and encompassing an unlimited number of topics required by the State including: anthropology, archeology, civics, mathematics, economics, geography, biology, government, history, political science, psychology, physiology, religion, sociology, ethnic studies, global education, law-related education, geology, art, music, physical education, environmental science, and more. Social studies have a richness to draw from that promotes multilevel thinking. Children need not start from recall or memory in social studies. They can move directly to analysis, synthesis, and problem solving, depending on whether the task is to form a group, develop an argument for one side of an engaging issue, or create a plan of action. Social studies are the perfect platform or foundation for teaching anything!
- 2. *Social studies accommodate learning styles and allows for the use of multiple intelligences.*** Social studies are so diverse that it invites the learner to explore content through many different avenues. Our target population includes multicultural children who, for reasons related to cultural differences, economic realities, etc., are misunderstood learners. The use of a range of teaching and evaluation methods are a benefit for these children, giving them alternatives they may not be offered in traditional settings. For example, a historical document like the Bill of Rights can be studied through singing, dancing, writing, drawing, debating, and deliberating. Students can bring what they know and can already do to learn unfamiliar things and express their new understandings. Linguistically, interpersonally, intrapersonally, visually/spatially, kinesthetically, logically/mathematically, musically oriented learners can all participate and share in our social studies-based classrooms.
- 3. *Social studies foster multicultural/global education.*** Social studies engage the learner personally in recognizing and valuing differences and similarities. Social studies are inclusive, putting what is familiar to students into historical, geographical, and cultural perspectives. It enlarges the narrow vision students frequently have of their immediate society, one they may take for granted without much awareness or

appreciation. Teaching students about diverse points of view and fostering appreciation for cultural differences is enhanced when their school day revolves around social studies concepts and themes. The very process of the democratic classroom, where all members are valued and respected and there is an absence of threat, is the foundation of multicultural global education.

**4. *Social studies are authentic.*** Using social studies as the core of the day brings natural and automatic connections with real life. Practicing skills from language arts such as writing a friendly letter or a newspaper article fits authentically within a social studies framework. Authentic learning for the whole child, every child, is possible and powerful at Pacific Heritage Academy.

**5. *Social studies combine breadth and depth.*** We desire our students to study social studies topics broadly and deeply. In-depth studies provide the time and intensity needed for students to construct a thorough understanding of important concepts, acquire skills and knowledge, and explore values. The balance between breadth and depth requires good teaching judgment.

**6. *Social studies give our students Roots and Wings.*** We have a strong belief that students benefit greatly in both personal and academic ways from information and experiences which help them know well their roots (ethnic, family, national, global and other heritages) as well as those opportunities which give them exposure to new and lifting ideas that move them forward and beyond their current situations (educationally, geographically, physically, economically, culturally, etc). It is our intent that students who attend Pacific Heritage Academy will obtain both Roots and Wings which secure them tightly to things that matter most and that enable them to soar into productive futures in the 21st century. We like and have adopted as a school philosophy and motto, the anonymous saying:

*"There are two lasting bequests we can give to our children-  
One is **ROOTS** and the other, **WINGS.**"*

### ***A Technique and Design for Weavers: The Expeditionary Learning Model***

Expeditionary Learning is a research-based design and teacher development program for comprehensive school improvement that achieves results. Clearly our favorite model, EL has been shown to produce outcomes such as improved teacher practice, higher student achievement and engagement, and a positive and productive school culture. The success of this model has been demonstrated in third party research



studies (*see Appendix for Section 12*) and by the growing number of schools across the nation (165) and in Utah (3 since 2005) who are implementing the model. Pacific Heritage Academy is pleased that the model includes best-practices such as:

- Students learn through long term, in-depth investigations (Learning Expeditions) that provide context and meaningful application for learning.
- Teachers are supported in the craft of organizing the Utah Core Curriculum and utilizing specific instructional practices (active pedagogy) that engage students in active, hands-on, inquiry based experiences connecting content with the need to know and the application of knowledge and skills.
- Student learning and the products created by the students have value beyond the classroom, the work and learning of the students often provides a benefit to the larger community and true service learning is achieved. Through their work students demonstrate mastery of the skills, knowledge, and attributes being taught in addition to taking responsibility for their learning as they apply skills of self-assessment and lead conferences with parents to review their accomplishments and growth.
- School time is structured in extended blocks to allow student's opportunities for in-depth focused learning as well as time for debrief and reflection on their experiences.

The EL model includes methods and structures that we feel go hand in hand with effectively targeting our multicultural learners and blends beautifully with our decision to use the social studies. EL supports our strong desire for active pedagogy and teaching 21<sup>st</sup> century skills. EL allows us to effectively deliver the State Core to our students. Indeed, EL allows us a way to prepare rich learning experiences about cultures, issues, people, history, and many more engaging topics in an engaging and holistic way which we believe will help students find their ROOTS and their WINGS.

### ***Material for Weavers: Reading, Watching, Listening, Writing, Doing, Going, Sharing, Creating, Performing, Producing and More***

As mentioned, our curriculum does not come pre-packaged on a shelf. It cannot be contained in a text book or set of audiovisual materials. It is, instead, uniquely and lovingly hand-crafted by our passionate educators who carefully reorganize Utah State Core into units of study with social studies themes. Teachers are intimately involved in the creation of Learning Expeditions by infusing their own personal expertise, interests or passions, and the expertise of others (parents, community members, professionals, etc) into lessons that pique the interest and curiosity of their students. These educators go the extra mile to search for and find unique sources of materials, opportunities, and

resources to give students the chance to read, or do, or go, or see, or experience things that give meaning and real-world application for concepts in the classroom. In this way, 'The Whole World is our Campus' and learning really never ends because everything and anything can be part of our learning. We highly value the community of Glendale and the wider State of Utah for a wealth of opportunity and resources for learning and service as well as professional educators who are passionate about a heavy involvement in curriculum development. At Pacific Heritage Academy we offer a chance for unparalleled creativity and involvement by educators, parents, and community.

### ***Support for Weavers: Methods to Assure Effective Implementation of the Model***

The following methods of support will be employed to assure the effective implementation of our instructional plan as outlined above. These methods are built into the EL model and supported by the Board of Trustees and will be an ongoing part of implementation at every level.

*Instructional Guide:* PHA will follow the EL model in the employment of a teacher-leader called an "Instructional Guide" (aka "IG"). This person is an experienced teacher, well versed in the model and becomes an on-site ready resource, a coach, a sounding board, and an inspiration to faculty as they increase their teaching skills and work to highly implement the EL model in our school. The Instructional Guide regularly visits and co-teaches in the classroom, modeling for and supporting teachers as they become master teachers in their own right. The Instructional Guide also works closely with the EL School Designer or Consultant to provide follow up and support for implementing newly acquired skills and methods from ongoing professional development trainings.

*Annual Implementation Review:* We seek a professional development services with that will be a comprehensive ongoing training program to include built-in opportunities to guide and assess practice and implementation. School leadership and faculty (like their students) will be challenged to create a school culture where even adults are learners and part of the "crew". Staff and faculty participate in the continual learning and self-evaluation process as they improve and correct over time, just as our students are taught to do. Reaching set objectives and standards, our adults model for students the joy of life-long learning and striving. Our use of EYE guidelines also ensure that our teachers are mentored and guided carefully, being given every support they need to successfully become teachers who reach students in authentic ways. Within the national EL network of schools, designation as a 'highly implementing school' is given to those schools that follow the prescribed model in many ways. We desire to work for this distinction and become a national model of a multicultural inner-city charter school



meeting the highest of standards in delivering quality education to hard-to-reach and underserved populations.

*Policy and Standards to reach Pacific Islander Targets:* To assure effectively reaching and educating our target group of Pacific Islander students, we have established policies that a minimum of one unit of study each year will be focused on an issue or topic directly related to the Pacific Islands or its people; past, present, or future, and that all students will participate in the Heritage Language Program on a weekly basis. A set of core knowledge standards for Pacific Island studies and languages will be developed to define what we would like to see students learn in the areas of heritage language and culture.

(Sources: Seeing the Whole Through Social Studies, Tarry Lindquist, 1995. See also Section 12 appendix for third party research, 21st Century Learning Model, and implementation policies)

## SECTION 12

# APPENDIX

### *Third Party Research on Expeditionary Learning*

#### *Center for Research on the Education of Students at Risk (CRESPAR), 2002*

In “Comprehensive School Reform and Student Achievement: a Meta-Analysis,” researchers looked at 29 comprehensive school reform models including EL. The report characterized Expeditionary Learning’s research base as showing “highly promising evidence of effectiveness.” This was the highest rating given to any model that was created in the last ten years. Only three of the 29 other models assessed received higher ratings, and they had all been in the field for a decade longer than EL to build a larger research base.

#### *National Staff Development Council (NSDC), 2002 and 1999*

A series of NSCD reports entitled “What Works: Results-Based Staff Development” have featured Expeditionary Learning as a leading professional development organization. The 2002 NSDC report on elementary school professional development notes that “using both independent third-party evaluations and internal assessment, consistent improvement in student achievement has been demonstrated throughout the [design’s] history.” The 1999 middle school report concluded that EL was the only program of 26 studied to meet all 27 standards for high quality professional development. The 2002 report on high school professional development mentions EL’s “heavy emphasis on teacher content development and the rigorous expectation of adult learning and collaboration for all teachers.”



***Center for Research in Educational Policy, 2002***

In comparison to a group of schools with similar demographics, teachers at the Rocky Mountain School of Expeditionary Learning (RMSEL) in Denver used significantly more coaching and project-based learning and significantly less direct instruction and independent seatwork. The study found that RMSEL students consistently outscored the weighted average of students from its four feeder districts across all grade levels for each year of the five-year study period on the Colorado State Assessment Program. RMSEL students scored on average 11.9 percentage points higher in reading than those of the comparison group.

***American Youth Policy Forum (AYPF), 2001***

Finding common ground between service learning and comprehensive school reform was the theme of the AYPF survey of 28 leading school reform models. The report gave Expeditionary Learning a five-star rating for being “highly compatible” in linking community service to academics and building “an ethos ...of service to others.”

***Polly Utichney, Ed. D., Brown University, 2000***

This study analyzed data from two New England Expeditionary Learning schools. Before adopting Expeditionary Learning, King Middle School in Portland, Maine scored lower than its district and state on the Maine Educational Assessment. In 1998-1999, however, King students outscored the state average in 6 of 7 disciplines. At the Rafael Hernandez School, a K-8 two-way bilingual school in Boston, students performed better on the MCAS tests than a district school with a demographically similar population. Ulichney concludes, “Expeditionary Learning implementation appears to be providing a strong academic curriculum that allows students from typically disadvantaged backgrounds to thrive.”

***American institutes for Research, 1999***

This study of comprehensive school reform determined that Expeditionary Learning was one of only eight school-wide reforms with a research base showing positive effects on student achievement, and noted that the positive effects were seen across subjects.

***Academy for Educational Development, 1995***

A study and evaluation of Expeditionary Learning’s first three years concluded that nine of ten original demonstration site EL schools showed significant improvement in the standardized tests mandated by their districts. Teachers reported that classroom practices changed markedly, including more collaboration with other teachers, a more systematic connection between content and skill learning, and the development of clear criteria for assessing student work. The study found that students produced high quality work and demonstrated high levels of engagement.

## SECTION 13

# ELEMENTARY ASSESSMENTS (K – 8<sup>TH</sup>)

### **Philosophy and Methods of Assessment**

Standards based assessment is used at Pacific Heritage Academy. Using the long-term targets as the assessment measure, students are evaluated on the level at which they meet the target. Teachers are instructed to use the standards-based approach as it is articulated by *Rick Stiggins and the Assessment Training Institute* (<http://www.assessmentinst.com>) and included in Expeditionary Learning contracts. Teachers will use both assessment “for” learning and assessment “of” learning. In other words, both formative and summative assessments are fully integrated into the teaching and learning.

The assessments “of” learning will range from quizzes and tests, to rubrics, oral evaluations, and performances. The fundamental expectations of the assessment process are to engage, support, and hold students accountable. We desire that each student be heavily involved in establishing personal learning objectives, taking an active role in both the plan and implementation. PHA will work closely with parents in creating the student expectations and will diligently share progress. Based on the assessment feedback, teaching will be differentiated and learning will be enhanced.

## 1) Use of Assessments FOR learning and OF Learning

### **With use of Assessment for learning (formative)**

#### *PHA Teachers...*

- Provide students with a clear and understandable vision of the learning targets
- Use examples and non-examples of strong work
- Offer regular descriptive feedback
- Teach students to self-assess and set goals.
- Design lessons to focus on one aspect of quality at a time.
- Teach students focused revision.
- Engage students in reflecting on, tracking, and sharing their learning
- Use assessment information to refine curriculum and guide instruction

*(Stiggins' seven AFL strategies, plus 1 from ELS)*

#### *PHA Students...*

- Articulate learning targets
- Analyze models to describe what reaching the target does and does not look like
- Analyze models to identify strategies for meeting the learning targets
- Make use of descriptive feedback from peers or teachers
- Assess their own work (or work of peers) to determine the distance between their current understanding or skill level and the target, and to identify next steps
- Revise for one aspect of quality at a time.
- Reflect on and keep track of progress over time
- Use reflection to set goals for future work

### **With use of Assessments OF learning (summative)**

#### *PHA Teachers...*

- Create a set of targets with an intentional distribution of types and outcomes (knowledge, skill, reasoning; subject area content and skills, literacy, craftsmanship, character)
- Select appropriate methods to assess learning
- Design high-quality assessments to measure progress toward long-term and supporting learning targets for expeditions, investigations, learning experiences and lessons

## 2) How Assessment Results are Utilized and Communicated

It is vital that as we use assessment tools to better understand our students, that we communicate these things with all stake holders who have an interest in the success of our students and of the school. As an EL school, we are clear and purposeful in our sharing of assessments. Many of our assessment structures feature opportunities for students to perform or exhibit learning. This allows real-time assessment of student progress in addition to shared joy in the experience and the success of students by parents and others who want and need to know how their student is progressing.

*Teachers at PHA...*

- Identify long-term learning targets on which grades will be based
- Use assessment information to determine overall progress toward long-term learning targets
- Provide students with summative feedback connected to long-term learning targets
- Follow school-wide procedure for determining final academic grades

*Pacific Heritage Academy...*

- Provides report cards and transcripts

*Students at PHA use the following structures to communicate their progress toward learning targets...*

- Portfolios
- Performances, Exhibitions or Galleries
- Student Led Conferences
- Celebration of Learning, Passages and Graduation Presentations

Following is a description of these communication structures.

*Student Portfolio:* Pacific Heritage Academy uses a portfolio system in which students create their own portfolio over the period of a year. The student will use the teacher's portfolio as a model. Portfolios will contain numerous sections such as goals, rubrics, written evaluations, and a graphing page for students to chart their own progress, including standardized tests. The portfolio will include a section for each subject where the student will display significant work, components of project work, and tests, as well as outlines for presentations and other proof of learning progress. Students will include written reflections in order to show their process of learning over time. We expect some of the project work and reflections to indicate learning of world cultures, including Pacific Islander cultures, experiences and work indicating language acquisition in a heritage language (a language spoken in the home or community, but not fully spoken

by the student). Students build their portfolios throughout the school year and then participate in a “passage” process, in which they will use their portfolios to share with a group of community members their accomplishments and growth. Within the portfolios, observers will be able to identify where and how students have met targets / standards. The passage event will take place every two years or as determined.

Pacific Heritage Academy promotes a culture of quality and instills in its students a drive for continual revision of their work until students meet or exceed set standards. Students learn to love the opportunity to revise and improve their work or performance whether it is writing, art, mathematics, music or any subject area. Portfolios will enable students to demonstrate and see for themselves their own progress and learning over time through the revision process. Students and their parents receive great satisfaction when portfolios contain a ‘paper trail’ documenting clearly the learning and progress toward learning targets and high standards.

*Performances & Presentations:* Opportunities to display and exhibit knowledge and skills are a very important component of both learning and assessment in our school. Students at PHA will participate in a variety of events throughout the year where they have authentic audiences who will see, benefit from, and enjoy their work. These same performances are assessment opportunities where students demonstrate the learning they have worked hard to obtain. The power of ‘Audience’ creates students who are intrinsically motivated to prepare well for these opportunities by learning to reflect on, critique, improve, and refine the ways they share the results of their educational journeys.

*Student-led Conferences:* At the beginning of each year, a preliminary conference between the student and the teacher will occur at which time the Student will be assisted in outlining his/her goals for the year. Students host their parents at conferences during selected quarters during the year where they are prepared to present important work samples from their developing portfolios, as well as an oral explanation of what and how he or she is doing in each content area. Conferences will include reflection and goal setting by the student in which the parent plays an integral part. Student portfolios will provide evidence that the student will be successful in the upcoming grade, and will contain concrete proof of the important skills and habits developed throughout the year.

*Celebration of Learning/Passages:* In addition to parent teacher and student-led conferences at the end of each expedition, a *Celebration of Learning* will be held to showcase the projects and the learning of each student. The Celebration of Learning will be open to the public. Throughout the year, students will also prepare for *Passages*,

which will take place at the end of each school year, in which they will present their polished portfolios to a panel consisting of parents, teachers, and a member of the community, as well as a student peer. Preparation for passages consists of panel presentations where students give a narration (oral report), written summary/report, and project proof (as required). *Passages* is required for all students to advance to the next grade.

*Written Evaluation:* Written evaluations of student work are given to students by peers, teachers, and panel participants over time. These help students learn to incorporate feedback into further their ongoing learning and refining process. This written feedback will be kept in Student Portfolio. At given points in the school year, teachers compile written evaluations of the student based upon his/her completion of the goals, rubrics, test results, completed portfolio and so on.

## Grading

The following scoring system is used at PHA when assessing student work. The use of this system will be well articulated to parents and students, with the goal of transparency and clarity of both expectations and level of accomplishment.

“4” = EXCEEDS LEARNING TARGETS

“3” = MEETS LEARNING TARGETS

“2” = APPROACHING LEARNING TARGETS

“1” = HASN’T BEGUN or BEGINNING TO MEET TARGETS

Through their work in the classroom, students become familiar with rubrics and developing assessment criteria for many aspects of work, performance, and production. They are not surprised then at the grading system at PHA. For each major assessment and assessment period, the teacher will develop a rubric (a grading plan) that clarifies the criteria that a student will have to meet. Within the standards-based assessment methodology comes the removal of character assessment to a separate evaluation. In other words, participation, behavior, and extra-credit are not included in the academic assessment of whether a student has met the standard. Realizing that character assessment is also a valuable piece of information, character will be assessed separately. A student’s “habits of work” and “habits of being” will be an important part of character evaluation. This system may be translated by teachers into a letter grade for 7<sup>th</sup> and 8<sup>th</sup> grade students as a way to help students and parents prepare for grading systems in more traditional school settings.

## **Habits of Work (HOW) and Habits of Being (HOB)**

In addition to academic expectations, Pacific Heritage Academy students are expected to build culture and character through their classroom and school experiences. Habits of Work will be fostered through learning expeditions and instructional practices, as well as activities and discussions that illustrate the strengths and positive attributes of Pacific Islander and American work ethic and other desirable character traits, studied within a cultural and social context. Students will be assessed on these Habits of Work and Habits of Being as they are articulated through academic courses, crew, intensives and any related school activities or events. We desire for all students to recognize and develop strong character traits that will serve them well in their lives as family members, citizens, and leaders.

### **3) Application of Assessment Results**

The results of assessment at Pacific Heritage Academy are applied to decisions about continued student learning and how that might best be accomplished. At PHA we have developed plans for remediation, promotion and retention based on assessment. These plans are outlined below:

#### **Remediation**

With long-term learning targets, based on standards, directing the classroom teaching, both assessments “for” and “of” learning will be used to analyze student progress and modify teaching. Students that do not meet the targets at a “proficient” level or have low scores on standardized assessments, will participate in a variety of remediation activities that range from:

1. Pull-out direct assistance and practice.
2. Before/after school extra help.
3. Student/Family plan that calls for participants to play an active role in helping their student make the expected progress.
4. Classroom-directed intensive intervention strategies.

Helping emerging readers become literate is a high priority at PHA, fully realizing the substantial challenges for struggling readers that enter the third and fourth grades.

Pacific Heritage Academy will utilize both a tutor and mentor system that will assist with keeping students at or above grade level. This system will allow for older students

to be working with younger students, along with volunteering (fingerprinted) adults to be trained to assist as well. Parents will be well-informed regarding student struggles and asked to participate in remediation plans.

### **Promotion and Retention**

Advancing to the next grade level is not taken lightly at Pacific Heritage Academy. As mentioned earlier, students must meet the curricular long-term learning targets, at a proficient level, in order for promotion to be recommended. Every effort will be made through on-going assessments and interventions to respond effectively to student needs. If a student has met the standards, established by the teacher, at a “proficient” or above category, promotion will be recommended. Because there is limited research supporting retention after grade 2, we will utilize the Response To Intervention [RTI] model of instruction when a student is found to be ‘not proficient’. The model will be implemented to boost student achievement and prevent academic deficiencies. This model includes three different tiers of instruction by intensity as well as short assessments used as a form of progress monitoring. The assessments ensure that student learning is regularly assessed to determine whether students are responding to the interventions (modification in instruction) and will help identify students with learning disabilities. This instructional process is a fundamental part of our Child Find efforts at Pacific Heritage Academy. (See Section 14: Special Education)

Also, with the use of “passage” portfolios, Pacific Heritage Academy students demonstrate their depth of understanding every two years. All PHA students are expected to participate in this process. Helping students prepare for the passage ceremony is an on-going activity worked on consistently over two years. Students will be using their portfolios during student-led conferences to inform families of their progress with evidence. After hearing the passage presentation, the community panel will make a recommendation for movement to the next grade level; pass with conditions; or remain in the current grade. These recommendations along with a substantial amount of input from a PHA student support team made up of a counselor, teacher, parent, and administrator will dictate a students’ advancement or retention. It is expected this process will eventually produce decisions agreeable to all parties and in the best interest of the student. If an agreement cannot be reached, the Director will be responsible for assisting parents in making the final decision.

Ultimately, there will be close communication between the teacher, student, parent(s), and administration in regards to student status and advancement. PHA will hold itself to high standards while keeping families informed AND involved in their child’s education.



#### 4) Professional Development Training in Assessment

Prior to beginning instruction, and throughout the year, teachers will be provided with professional development training in practices and principles which have proven effective by master teachers and those identified as vital for life in the 21<sup>st</sup> century. Many of these are found in the *Expeditionary Learning Method*. Teachers receive training to plan units of study (learning expeditions) and lesson plans by reorganizing state core requirements ensuring that all standards are covered for each grade. They will be given ample planning time on a weekly basis and to prepare for each quarter. Expeditions and lesson plans will be evaluated to ensure that they cover required standards. We will also incorporate the *Assessment Training Institute (ATI)\** methods of assessment which is part of a traditional EL contract or available independent from ATI. Pacific Heritage Academy will administer the Utah State Core End of Level Test (CRTs), DWA, and any other test required by the state. Teachers will also be trained to administer appropriate summative tests across the disciplines in order to assess student progress toward mastery of objectives.

#### 7<sup>th</sup> & 8<sup>th</sup> Grade Core Curriculum Requirements

Pacific Heritage Academy will meet Utah State Middle School Requirements as stated in Utah Administrative Code, R277-700-5. Pacific Heritage Academy students will earn a minimum of 12 units of credit through the following Core Curriculum Requirements:

General Core (10.5 units of credit)

Subject	Units of Credit
Language Arts	2.0
Mathematics	2.0
Science	1.5
Social Studies	1.5
The Arts (Music, Dance, Visual Art, Theatre)	1.0
Physical Education	0.5
Health Education	0.5
Career and Technical Education, Life, and Careers [CTE]	1.0
Educational Technology	Credit optional
Library Media	Integrated into subject areas

## SECTION 14

# SPECIAL EDUCATION

Pacific Heritage Academy (PHA) ensures the provision of a free and appropriate public education to any qualified student with a disability who needs special education and related services, in accordance with federal and Utah law.

### **Special Education Services**

PHA understands that a free public education includes receiving special education and related resource services (as specified on the IEP) designed to meet the student's unique needs, and to prepare them for employment and independent living.

PHA is committed to:

- Provide direct, consultative, and related services as specified in the IEP
- Serve all eligible students with disabilities, regardless of disability.
- Provide a continuum of special education services to serve all students with disabilities, regardless of severity.
- Ensure adequate qualified staff or contract providers are available to conduct evaluations and provide services as required by IDEA 2004 and Utah Special Education Rules.
- Employ full-time and part-time special education teachers to make certain that PHA meets the needs of every child who requires special education.
- Comply with all federal and state special education laws – IDEA 2004, and all state and federal rules concerning OCR, ESL, “504” and ADA issues.



- Work directly with the special education faculty and parents to develop IEPs for individual students to ensure their success.

The PHA Administrator will:

- Ensure all Utah Special Education requirements are met.
- Serve as the Special Education Local Education Agency (LEA) representative and be trained in all LEA procedures and policy.
- Attend trainings offered by USOE on IDEA 2004 and Utah Special Education Rules, as well as other relevant trainings.
- Ensure that the special education faculty is fully certified, licensed, endorsed, and experienced in handling the wide array of special education needs, duties, and responsibilities.

The PHA special education teacher(s) will:

- Have a clear knowledge of IDEA 2004, Utah Special Education Rules, as well as records management (request, review, maintenance, transfer, etc.).
- Be certified either mild/moderate or severe, licensed, and trained to meet the learning needs of students with disabilities.
- Attend all monthly Special Ed trainings and round tables offered by USOE (as applicable)
- Provide, coordinate, and administer PHA's Special Education/Resource program.

### **Special Education Staffing and Service Providers**

While it is difficult to predict the precise number of students needing special education services, PHA estimates that 10-15% of its student population will have special education needs, and has projected its faculty needs and special education services accordingly. If this population of children with special needs exceeds 10-15%, PHA will draw resources from other areas (i.e., part-time teaching aides, capital purchases, etc.) to ensure that PHA meets all special education needs. PHA preserves the discretion to retain the services of specialized third-party providers (speech pathologists, child psychologists, etc.) for unique situations.

Prior to the start of its second year in operation, PHA management will assess its special education needs and modify its program according to the volume of services required by the PHA student body. If needed, additional part time or full time special education professionals may be hired to address special education and resource needs.

## **New Referrals and Initial Evaluation Timelines**

All initial evaluations from new referrals will be documented and completed within the required 45 school days time limit upon receipt of parental permission, as per Utah State Law. Evaluations will be made by a team of qualified evaluators and include a variety of assessments, both formal and informal, and comprehensive enough to address all areas of educational need. Such evaluation shall also include information provided by the parents of the students, observations, school or state assessments, and information from related service providers (when applicable).

## **Continuum of Services**

The PHA Administrator will ensure that a continuum of alternative placements is available to meet the needs of students with disabilities for special education and related services which meets all IDEA 2004 and Utah Special Education Rules requirements. Such placements include the regular classes, special classes, special schools, home instruction, and instruction in hospitals and institutions. PHA students with disabilities will be educated with their non-disabled peers to the maximum extent possible in the Least Restrictive Environment (LRE). They will also have access to and progress in the general curriculum. PHA may also make provisions for supplementary services (such as resource rooms or itinerant instruction) to be provided in conjunction with regular class placement.

## **Special Education Records**

PHA will ensure the protection of the confidentiality of any personally identifiable data, information, and records collected or maintained by the PHA Special Education staff through collection, storage, disclosure, and destruction stages. The records will be kept in the Special Education resource room in a locked file. Any records regarding the Special Education of a student with disabilities will remain in the Special Education's auspices and not added to his/her general accumulation file to ensure confidentiality. Access rights to the records will be granted to the student's parents to inspect and review unless such privileges are denied under state law governing such matters as guardianship, separation, and divorce. A parent must have sufficient reason to inspect files and be given access to the files in accordance to Federal FERPA Act and an

appropriate document stating reason presented. Should a discrepancy arise with records, the matter will be handled through FERPA outlines.

PHA will maintain, for public inspection, a current listing of the names of those employees at PHA and other persons who may have access to the personally identifiable information on students with disabilities. Anyone who accesses the files of any student must sign for them, use them in the resource room, and return them promptly. PHA will shred information no longer needed at the request of student age 18 or older or of the age of majority. Because most students will transfer from PHA to a high school, student records will most likely be transferred to their schools. However, if their records are not transferred, each student's records will be considered "no longer needed to provide educational services" and may be destroyed when student turns 22 years old (and after an attempt is made to notify student of intent).

### **Child Find Procedures**

The Response To Intervention [RTI] model of instruction will be implemented as a fundamental part of our Child Find efforts as well as to boost student achievement and prevent academic deficiencies among all students. This instructional process includes short assessments used as a form of progress monitoring and a 3-tiered instruction process. As explained previously, the assessments ensure that student learning is regularly assessed to determine whether students are responding to the interventions (modification in instruction) and will help identify students with learning disabilities. Additionally, PHA will ensure the following:

- The special education faculty will train the general PHA faculty and staff (including volunteers) annually in Child Find procedures including: identifying students who are at-risk, implementing interventions, gathering data, and referring students to special education for testing.
- Parents will receive information explaining the Child Find process and resources (and shall be available in the native language of their students).
- Parents will be encouraged to communicate with the classroom teacher or principal if they have any concerns about their student's learning and education.
- Ongoing data will be analyzed frequently for early identification of students with disabilities.

*Our Two-headed Challenge:* Special education research on the inappropriate identification of children in special education focuses to a large extent on the *overrepresentation* of culturally and linguistically diverse children. However, there is also evidence indicating that child find efforts may fail to reach such underserved



populations and that these children may then be *underrepresented* in special education and related services.

*Our Plan:* We want to be sensitive to the fact that cultural or language barriers *may* have affected understandings and perceptions of parents and the rates of parental consent to evaluate students in other settings. We make a special effort to take on the challenge of language and culture and to make clear communication pathways with parents. Prioritizing language skills and cultural knowledge of applicants for administrative and faculty positions and the use of interpreters and translators will assist us in our goals. Conversely, we recognize that some students who come to PHA with special education designation and IEPs may have been misdiagnosed and wrongly or prematurely placed and *may* deserve reevaluation. We will watch for, and be sensitive to this possibility. PHA's Child Find procedures focus on students who are currently enrolled or may enroll at the charter school. We also see value in partnering with community agencies to offer developmental screenings at health fairs, identify primary referral sources, and distribute public awareness materials.

#### **American with Disabilities Act (ADA)**

Section 6 (Capital Facility Plan) addresses designs/plans of building layout to ensure access for all people with disabilities under ADA requirements.

## SECTION 16

# ADMISSION AND DISMISSAL PROCEDURES, INCLUDING SUSPENSION/EXPULSION

### *Admission and Enrollment Policy*

Pacific Heritage Academy, a public charter school, follows Federal and Utah State Board of Education regulations, guidelines and practices regarding enrollment of all students. By design and State Charter, Pacific Heritage Academy is limited to 450 students, grades Kindergarten through 8th grade.

#### **Open Enrollment**

Pacific Heritage Academy will have an open enrollment period (to be determined). Pacific Heritage Academy will accept applications without regard to race, color, religion, sex, national or ethnic origin, disability, or need for special education services. We recognize the benefits of a diverse student population and we encourage enrollment of a wide variety of students from across the Salt Lake valley. In the event Pacific Heritage Academy receives more applications than it has enrollment capacity, the school shall hold an impartial lottery.



## **Lottery Selection**

Pacific Heritage Academy, by law, may give priority to children of “founders” or of parents who have “actively participated in the development of the school.” Children of teachers may also be given preference for enrollment. These students will be included with the founding board preference percentage. If, by the application deadline, the number of applications exceeds the capacity of a class or grade level, all applications for that class or grade level will be selected for the available slots through a lottery.

## **Lottery Policy**

1. Currently enrolled Pacific Heritage Academy students who request continuing enrollment by a date designated each school year will be guaranteed placement for the following school year.
2. Siblings of currently enrolled students who request enrollment by the designated date each school year will be guaranteed placement for the following school year.
3. All other registration requests will be entered into Pacific Heritage Academy lottery to be held on a designated date each spring and open to the public. After the lottery students will be notified of their selection in the lottery and will have 2 weeks to complete the pre-registration process. Students who complete the pre-registration process and who are applying for a grade level and/or program that is currently open will be guaranteed placement for the following school year. Students who do not respond within the two weeks will not be guaranteed placement for the following year.
4. Students who are applying for a currently closed grade level or program will be placed on a waiting list in the order that their pre-registration materials come in. That waiting list will be maintained until the first day of school the following fall. After that time there will be open enrollment for any existing openings in the school.
5. During the lottery, names will be drawn one at a time. As a student is selected, their siblings will also be offered a place at Pacific Heritage Academy, as requested and possible. This process will continue until school enrollment capacity has been reached.
6. Following the lottery and spring pre-registration process, remaining openings for the following school year will be filled from names drawn from the lottery until that process is exhausted, and then through open enrollment.



7. Any remaining openings for the following school year after the lottery and spring registration process will be filled on a first-come first-served basis until designated school capacity is achieved.

## **Discipline and Dismissal Policy**

### **Discipline Philosophy**

Pacific Heritage Academy will employ discipline policies which align with the philosophy that all people have a desire for and can make good choices. Our policies and practices heighten positive thinking in school and at home, give students and other family members the power to choose, and discover productive means of reflection and self-evaluation. Our discipline program will be an integral part of our school culture, one that promotes true democracy and learning, and motivates right and responsible behavior from the inside out. We will not use discipline measures that demean or devalue the human spirit, frustrate and stress children or adults, or waste valuable learning time. We believe student learning is maximized when students realize and make an internal choice to participate in their own destiny with responsible thinking and behaviors. We have a plan to implement a comprehensive program that teaches SELF-DISCIPLINE, the meaning and value of democracy, and will build a strong learning culture within our learning community.

We anticipate the use of a strong and democratic approach that is being used in effective schools across the nation and internationally. The approach comes from a book called Discipline Without Stress, Punishments, or Rewards by Dr. Marvin Marshall. The Discipline without Stress model promotes responsibility, increases effectiveness, improves relations, and reduces stress for students and the adults that care for them. The model teaches true democracy and models for teachers and parents, healthy ways to communicate with children and to help them become wise and independent decision-makers. This model seems like it will be a good fit for our learning community and an approach that may have value in the homes of our students as well.

### **Confidentiality**

School officials shall strictly protect student confidentiality in matters of discipline and take all reasonable measures to keep information dissemination on a need-to-know basis.

## Code of Conduct

All students have the right to learn in a safe environment that fosters proper learning and respect for the personal, civil and property rights of everyone associated with the school. At Pacific Heritage Academy, there will be a shared responsibility between students, parents, and teachers in providing a productive learning atmosphere. Pacific Heritage Academy will create a conduct policy that will be distributed to each student upon enrollment in the school. The policy will also be available online and posted prominently in the school.

### General Guidelines for Minor Misconduct Include

- Redirection: teacher uses eye contact, body language, or an indirect suggestion to redirect student behavior.
- Verbal Reminder: teacher offers low key, but direct, verbal reminder.
- Private (short) conference: teacher invites the student to discuss the issue. The teacher clearly identifies the inappropriate behavior and offers a choice. A positive way forward is agreed upon.
- Private (longer) conference: teacher seeks to understand where the behavior is coming from. Teacher seeks ways to help. However, in spite of background circumstances, expectations of proper behavior are reiterated and the student's obligations are made very clear. Teacher seeks, where possible, to find consequences which have a reasonable relationship to the misconduct.
- Call home to parents: lack of improvement or multiple incidents regarding the same behavior will lead to a phone call to parents. The teacher may arrange for a parent/guardian to participate in a student led conference regarding the issue.
- A teacher may remove a student from class when the actions of the student continually disrupt the educational process of the classroom, and the student will not cooperate in improving the situation.

*In an emergency situation which constitutes a clear and present danger to students or school personnel, suspension may be imposed without affording the student the opportunity of a conference. When such an emergency situation occurs that requires the immediate use of moderately or highly intrusive interventions to protect the student or others from harm, school staff shall complete and submit an emergency behavior information form and shall notify the student's parents immediately.*

## **Disciplinary Action**

When a student fails to follow the school's Code of Conduct, a teacher may determine appropriate disciplinary action. Such disciplinary action may include a student behavior contract, a parent-teacher conference, or a behavior conference with the Director. A teacher may refer any student to the Director for a behavior conference. The teacher shall immediately report to the Director of the school and take the student to the Director for appropriate action. The Director shall immediately conference with the student. The student shall have the opportunity to tell his/her side of the story. The Director shall document the student conference.

## **Suspension**

As soon as the decision to suspend a student has been made, the Director or designee will notify the parent or legal guardian, in person whenever reasonably possible, that the student is suspended, the grounds for the suspension, the period of time for which the student is suspended, and the time and place for the parent or legal guardian to meet with a designated school official to review the suspension and arrange the reinstatement of the student. A student or parent may present any questions about the suspension when notified about the suspension or at the review meeting. If a student is suspended before the end of the school day, the student shall only be released to a parent or emergency contact.

The Director shall ask the parent or guardian of the student to attend a parent/teacher conference regarding the suspension. This meeting shall be scheduled to occur as soon as is practicable, but in all cases prior to the end of the tenth day of the suspension. The Director or other authorized school administrator must attend the conference. The student shall not be returned to the class from which he was suspended, during the period of suspension, without the concurrence of the teacher of the class and the Director. During the time of suspension from the class, a place shall be provided by the administration for the student to report, until the situation is resolved. Students shall be allowed to complete make-up work or substitute assignments for those missed while the student is suspended.

The Director may suspend a student for up to ten (10) consecutive school days. The length of time that a student is suspended shall be related to the seriousness of the offense.

Offenses that may result in suspension include, but are not limited to:

1. Fighting (fist or otherwise) with the intent to do bodily harm to another person
2. Assault
3. Verbally abusing others
4. Defying the valid authority of a teacher, administrator, or other adult at the school
5. Bullying, or otherwise threatening another's physical or emotional safety
6. False report of fire/explosion
7. Racial or sexual harassment
8. Possession, distribution, or accessing of pornography (printed, electronic, or otherwise)
9. Use of alcohol or drugs on school property
10. Stealing school or private property
11. Defacing school property or property of others
12. Unauthorized use of equipment
13. Inappropriate use of the internet
14. Committing an obscene act or engaging in habitual profanity or vulgarity

## **Expulsion**

Offenses that may result in expulsion include, but are not limited to

1. Attacking another person
2. Placing the well-being of others in serious risk
3. Causing serious injury to another person
4. Possession of, use, sale of, or furnishing any firearm, knife, explosive, or other dangerous object
5. Robbery or extortion
6. Offering, furnishing, or selling drug paraphernalia
7. Criminal behavior
8. Three or more suspensions in one year

The permanent dismissal of a student is an extreme measure to be taken only as a last resort after all other efforts of motivation and counseling have failed.

Prior to expelling a student the student and his/her parents/guardians shall be given a written statement of the reasons for the expulsion. If circumstances require an immediate expulsion, written notice and an opportunity to meet shall be provided to the student and his/her parents immediately.

The director shall also notify the parents, *in writing*, of the opportunity to request a hearing. Parents/guardian may request a formal hearing as a part of the due process



procedure for long-term suspensions (more than 10 days) and all expulsions. A three person administrative panel reviews a case and determines if the recommendation to suspend or expel a student is supported by evidence presented at the hearing.

Pacific Heritage Academy shall maintain records of all student suspensions and expulsions at the school.

## *Discipline Procedures for Students with Disabilities*

Note: When making decisions on behavioral interventions for students receiving special education services, the Director shall refer to the *USOE Special Education Least Restrictive Behavior Interventions (LRBI) Guidelines* for information on research-based intervention procedures.

If the pupil qualifies as a disabled student under IDEA or 504, or if the student is currently being evaluated for special education services, suspension must follow all applicable state and federal laws regarding students with disabilities. The special education team (including parents, School Director, classroom teachers, and special education teachers) must ensure that any disciplinary or suspension procedures are aligned with the student's Individualized Education Program (IEP) and are carefully documented.

Pacific Heritage Academy follows Utah Special Education Rules regarding discipline procedures for students with disabilities which states:

### **Authority of School Personnel**

1. School personnel may consider any unique circumstances on a case-by case basis when determining whether a change in placement, consistent with the other requirements of this section, is appropriate for a student with a disability who violates a code of student conduct.
2. School personnel may remove a student with a disability who violates a code of student conduct from his or her current placement to an appropriate interim alternative educational setting, another setting, or suspension, for not more than ten (10) consecutive school days (to the extent those alternatives are applied to students without disabilities), and for additional removals of not more than ten (10) consecutive school days in that same school year for separate incidents of misconduct, as long as those removals do not constitute a change of placement.
3. After a student with a disability has been removed from his or her current placement for ten (10) school days in the same school year, during any subsequent days of removal the local educational agency (LEA) must provide services to the extent required.
4. For disciplinary changes in placement that would exceed ten (10) consecutive school days, if the behavior that gave rise to the violation of the school code is determined not to be a manifestation of the student's disability, school personnel may apply the relevant disciplinary procedures to students with disabilities in the same manner and for the same duration as the procedures would be applied

to students without disabilities, except after the 10th day of removal that constitutes a change in placement, the LEA must provide services to the student.

### **Services**

1. A student with a disability who is removed from the student's current placement must:
  - a. Continue to receive educational services, so as to enable the student to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the student's IEP; and
  - b. Receive, as appropriate, a functional behavioral assessment, and behavioral intervention services and modifications that are designed to address the behavior violation so that it does not recur.
2. The services may be provided in an interim alternative educational setting.
3. An LEA is only required to provide services during periods of removal to a student with a disability who has been removed from his or her current placement for ten (10) school days or less in that school year, if it provides services to a student without disabilities who is similarly removed.
4. After a student with a disability has been removed from his or her current placement for ten (10) school days in the same school year, if the current removal is for not more than ten (10) consecutive school days and is not a change of placement, school personnel, in consultation with at least one of the student's teachers, determine the extent to which services are needed, so as to enable the student to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the student's IEP.
5. If the removal is a change of placement, the student's IEP team determines appropriate services to be provided during the removal.

### **Change of Placement due to Disciplinary Removals**

1. For purposes of removals of a student with a disability from the student's current educational placement, a change of placement occurs if:
  - a. The removal is for more than ten (10) consecutive school days; or
  - b. The student has been subjected to a series of removals that constitute a pattern:
    - (1) Because the series of removals total more than ten (10) school days in a school year;
    - (2) Because the student's behavior is substantially similar to the student's behavior in previous incidents that resulted in the series of removals; and

- (3) Because of such additional factors as the length of each removal, the total amount of time the student has been removed, and the proximity of the removals to one another.
2. The LEA determines on a case-by-case basis whether a pattern of removals constitutes a change of placement. This determination is subject to review through due process and judicial proceedings.

### **Manifestation Determination**

1. Within ten (10) school days of any decision to change the placement of a student with a disability because of a violation of a code of student conduct, the LEA, the parent, and relevant members of the student's IEP team (as determined by the parent and the LEA), must review all relevant information in the student's file, including the student's IEP, any teacher observations, and any relevant information provided by the parents to determine:
  - a. If the conduct in question was caused by, or had a direct and substantial relationship to, the student's disability; or
  - b. If the conduct in question was the direct result of the LEA's failure to implement the IEP.
2. If the LEA, the parent, and relevant members of the student's IEP team determine that the misconduct was the direct result of the LEA's failure to implement the IEP, the LEA must take immediate steps to remedy those deficiencies.
3. If the LEA, the parent, and relevant members of the IEP team make the determination that the conduct was a manifestation of the student's disability, the IEP team must:
  - a. Either:
    - (1) Conduct a functional behavioral assessment (FUBA), unless the LEA had conducted a functional behavioral assessment before the behavior that resulted in the change of placement occurred, and implement a behavioral intervention plan (BIP) for the student; or
    - (2) If a behavioral intervention plan already has been developed, review the behavioral intervention plan, and modify it, as necessary, to address the behavior; and
  - b. Unless the misconduct falls under the definition of special circumstances in V.E.5, return the student to the placement from which the student was removed, unless the parent and the LEA agree to a change of placement as part of the modification of the behavioral intervention plan.
4. Special circumstances. School personnel may remove a student to an interim alternative educational setting for not more than forty-five (45) school days without regard to whether the behavior is determined to be a manifestation of the student's disability, if the student:



- a. Carries a weapon to or possesses a weapon at school, on school premises, or to or at a school function under the jurisdiction of an LEA;
- b. Knowingly possesses or uses illegal drugs, or sells or solicits the sale of a controlled substance, while at school, on school premises, or at a school function under the jurisdiction of an LEA, or
- c. Has inflicted serious bodily injury upon another person while at school, on school premises, or at a school function under the jurisdiction of an LEA.
- d. Definitions. For purposes of this section, the following definitions apply:
  - (1) Controlled substance means a drug or other substance that cannot be distributed without a prescription, identified under schedules I, II, III, IV, or V in section 202(c) of the Controlled Substances Act (21 USC 812(c)).
  - (2) Illegal drug means a controlled substance but does not include a drug controlled, possessed, or used under the supervision of a licensed health-care professional or one legally possessed or used under the Controlled Substances Act or under any other provision of Federal law (21 USC 812).
  - (3) Serious bodily injury means bodily injury that involves a substantial risk of death, extreme physical pain, protracted and obvious disfigurement, or protracted loss or impairment of the function of a bodily member, organ, or mental faculty (18 USC 1365). Serious bodily injury does not include a cut, abrasion, bruise, burn, disfigurement, physical pain, illness, or impairment of the function of a bodily member, organ or mental faculty that is temporary (20 USC 1365).
  - (4) Weapon means a weapon, device, instrument, material, or substance, animate or inanimate, that is used for or is readily capable of, causing death or serious bodily injury, except that such term does not include a pocket knife with a blade of less than 2-1/2 inches (18 USC 930).

### **Appeals by Parent of LEA**

1. The parent of a student with a disability who disagrees with any decision regarding placement, or the manifestation determination, or an LEA that believes that maintaining the current placement of the student is substantially likely to result in injury to the student or others may appeal the decision by requesting a hearing. The hearing is requested by filing a due process hearing complaint.
2. Authority of hearing officer.
  - a. A due process hearing officer hears, and makes a determination regarding an appeal.
  - b. In making the determination, the hearing officer may:

- (1) Return the student with a disability to the placement from which the student was removed if the hearing officer determines that the removal was a violation of the discipline procedures under Part B of the IDEA or these Rules or that the student's behavior was a manifestation of the student's disability; or
  - (2) Order a change of placement of the student with a disability to an appropriate interim alternative educational setting for not more than forty-five (45) school days if the hearing officer determines that maintaining the current placement of the student is substantially likely to result in injury to the student or to others.
- c. The appeal procedures may be repeated if the LEA believes that returning the student to the original placement is substantially likely to result in injury to the student or to others.
3. Expedited due process hearing.
  - a. Whenever a hearing is requested, the parents or the LEA involved in the dispute must have an opportunity for an impartial due process hearing.
  - b. The LEA is responsible for arranging the expedited due process hearing with the USOE, which must occur within twenty (20) school days of the date the complaint requesting the hearing is filed. The hearing officer must make a determination within ten (10) school days after the hearing.
  - c. Unless the parents and LEA agree in writing to waive the resolution meeting, or agree to use mediation:
    - (1) A resolution meeting must occur within seven (7) calendar days of receiving notice of the due process complaint; and
    - (2) The due process hearing may proceed unless the matter has been resolved to the satisfaction of both parties within fifteen (15) calendar days of the receipt of the due process complaint.
  - d. The decisions on expedited due process hearings are appealable.

## SECTION 17

# PROCEDURES TO REVIEW COMPLAINTS

Parents play an integral role in their child's education and Pacific Heritage Academy welcomes parent involvement in all school aspects. The following procedures shall be used to address concerns that parents/guardians may occasionally have in regard to a particular aspect of the school. Open and honest communication between parents and the school is welcomed and encouraged. The Board of Trustees encourages active parent participation in their children's education. In order for Pacific Heritage Academy to best meet the needs of the student and the school, parents are asked to adhere to the following procedure when addressing concerns:

1. Items involving teachers or staff members should first be addressed with the individual(s) directly involved.
2. If the teacher or individual is not able to resolve the concern to the parents' satisfaction, the concern should then be addressed with the Director.
3. If the Director cannot resolve the issue satisfactorily, or the specific issue concerns the director, a written complaint may be submitted to the Board of Trustees. Parents may choose to either present their case directly to the Board of Trustees or have the case presented on their behalf by the President of the Board of Trustees. The Board of Trustees will respond as quickly as circumstances dictate, not to exceed 45 days.

If a parent has a concern with a policy, procedure or practice at the school, parents are asked to adhere to the following:

1. If the concern is directly related to administrative practices or procedures, parents may address their concerns directly with the Director.
2. If the concern deals with school policy, parents may address the board in a formal Board of Trustees meeting during the “public comment” portion. Parents may also request to be added to the meeting agenda by contacting the president of the Board of Trustees 3 working days prior to the scheduled meeting date.

If a parent feels his/her child has been treated unfairly, discriminated against, or treated in a manner that is in violation of state or federal law, a written complaint may be submitted to the principal, and an appointment may be made to discuss the issue. Written complaints should include the individual(s) involved, details of the incident(s), including dates and approximate times, and details of an attempt to rectify the situation. The written complaint must be filed within twenty (20) working days of the date the grievant knew, or should have known, of the circumstances which precipitated the incident.

Informal complaints are resolved at the lowest administrative level. The complainant and other person(s) involved shall resolve issues of concern via personal meeting or other appropriate communication. After the immediate parties have attempted and failed to resolve the issues, the Director shall coordinate and mediate the processes necessary for satisfactory resolution of the complaint. Upon receipt of an informal complaint, the Director shall initiate action to resolve the issue within five (5) working days.

Formal complaints are to be made in writing when the complainant is not satisfied with the disposition of the issue through the informal complaint process. The complainant may, within ten (10) working days after the informal complaint decision has been rendered, file the complaint in writing, with any member of the Board of Trustees.

Within ten (10) working days after receipt of the formal written complaint, a designated officer of the Board will meet with the complainant in an effort to resolve the issue.

In the event the complaint is not resolved, the complainant may request a hearing before the Board of Trustees. The Board shall review the complaint at the next scheduled Board meeting after receipt of the request.



The Board’s decision shall be final and shall be made within ten (10) working days of the hearing.

## Grievances

### Definitions

*Grievance* – A complaint from any individual within Pacific Heritage Academy (i.e. Student, parent, employee) which:

1. Sets forth the allegation that there has been a violation of any policy, accepted practices, or state or federal law.
2. Specifically identifies the policy, practice, or statute violated.

*Grievant* – Any individual or group of individuals aggrieved by a decision or condition falling under policy, accepted practices, or state or federal law.

*Organizational Structure* – Pacific Heritage Academy desires to address all grievances in an orderly manner using the organizational structure as layers or lines of support to guide the resolution of grievances. Depending on the area of alleged violation, students or others who have grievances will find a line of support offered in grievance process:

<i>Areas of</i>		
<i>Classroom Instruction</i>	<i>Special Education</i>	<i>Other Operations</i>
Classroom Teacher	Special Education Teacher	Directly involved party
Lead Teacher	Academy Director	Business Manager
Academy Director	Board of Trustees	Academy Director
Board of Trustees		Board of Trustees

### Procedures

1. Step I:
  1. Any individual alleging a grievance is encouraged to resolve the problem, if possible, through an informal discussion with the person or persons suspected of violation, beginning at the earliest level of organizational structure.
    1. Student’s parents should discuss classroom concerns first with classroom teachers.

2. Employees should discuss concerns first with directly involved parties.
2. When individuals hear complaints or receive formal grievances, they should first make sure that grievant or potential grievant have first attempted in good faith to resolve problems with directly involved persons.
2. Step II:
  1. In the event that the informal discussion with directly involved parties does not resolve the issue, grievant shall file a formal written grievance form with the next responsible individual in the organizational structure. Grievance Forms are available from the office manager.
    1. The grievance must be filed within twenty (20) working days of the date the grievant knew, or should have known, of the circumstances which precipitated the grievance.
    2. The responsible individual shall respond in writing, within five (5) working days following receipt of the grievance.
    3. If the next responsible party is the Academy Director, Step II does not apply and grievant moves to Step III.
3. Step III:
  1. If the response (decision) at Step II does not resolve the problem, the grievant shall forward the grievance to the Academy Director to initiate Step III.
  2. The Academy Director shall investigate the complaint with the parties concerned in the grievance within fifteen (15) working days of the grievance having been filed at Step II.
  3. At the conclusion of the investigation, the Academy Director shall render a decision and issue a written report setting forth the Director's findings and recommendations for the resolution of the grievance within five (5) working days.
  4. The grievance shall be considered resolved if the grievant and the Board of Trustees accept the recommendations of the Academy Director.
  5. If no written report has been issued within the time limits set forth in "3" above, or if the grievant shall reject the recommendations of the Academy Director, the grievant shall have the right to appeal to the Academy Board for review of the grievance at Step IV.
4. Step IV:
  1. A written request for the Board of Trustee's review of the grievance must be submitted to the Board Secretary within 10 days of the date of the Academy Director's report or the expiration of the time limits set forth in Step III.

2. The Board of Trustees shall review the grievance and the Academy Director's report, and may hold a hearing.
3. The Board of Trustees may affirm the Academy Director's recommendations, amend the recommendations, or affirm the recommendations in part and amend in part.
4. The Board of Trustees written decision shall be issued within thirty (30) working days of receipt of the grievant's written appeal by the board secretary.
5. If no written decision has been issued within the time limit set forth in "4" above or if the grievant shall reject the decision of the Board of Trustees, the grievant shall be free to pursue such litigation or statutory remedy as the law may provide.

### **Procedures for Reviewing Complaints of Parents of Special Education Students**

Pacific Heritage Academy follows all state laws regarding complaints of parents of students served under Section 504 or IDEA 2004. The Director oversees regular education programs (Section 504) and Special Education programs (IDEA) at the school level. Parents who have concerns regarding the treatment of a student with disabilities or a student suspected of having a disability may contact the Director.

The following briefly describes Utah's Dispute Resolution System available to parents of students with disabilities under IDEA:

There are four procedures available

1. Problem Solving Facilitation
2. Formal State Complaint
3. Mediation
4. Due Process Hearing

*These procedures are not sequential. However, Problem Solving Facilitation CANNOT proceed if a Formal Complaint, Mediation, or Due Process Hearing request is filed. A Formal Complaint CANNOT proceed if a Due Process Hearing request is filed.*

1. Problem Solving Facilitation
  - State early dispute resolution procedure available at any time, before a State Complaint, Mediation, or due Process Hearing request is filed.
  - Both parties must agree.

- Issues of disagreement must be specified, and how they violate IDEA described.
- No timeline.

## 2. State Complaint (Formal)

- Filed with Superintendent of district and copied to Utah State Office of Education, Nan Gray, State Director of Special Education.
- State Complaint Form on website or may be a letter with required elements
- Describe alleged violations of IDEA with respect to individual student.
- Describe proposed solutions to the problems.
- District has 30 days to investigate and write decision.
- Parent may appeal decision to USOE with 10 days of district decision if disagree.
- USOE completed independent investigation before total of 60 days, unless parties agree to extend for some significant reason.

## 3. Mediation

- Any party may request at any time during the IDEA process.
- Both parties must agree to mediate or mediation will not occur.
- Filed with Superintendent of district and copied to Utah State Office of Education, Nan Gray, State Director of Special Education.
- Describe the problem.
- Describe alleged violations of IDEA with respect to individual student.
- Describe proposed solutions to the problems.
- USOE assigns mediator and absorbs costs of the mediation sessions.
- Attorneys not usually present.
- Discussions during mediation confidential.
- Mediation agreement is binding and may be enforced in court of law.
- No timeline.

## 4. Due Process Hearing Request

- Filed with Superintendent of district and copied to Utah State Office of Education, Nan Gray, State Director of Special Education.
- Describe problems.
- Describe alleged violations of IDEA with respect to individual student.
- Describe proposed solutions to the problems.
- Mandatory Resolution Session initiated within 15 days; resolution completed within 30 days, if resolution is possible.
- Hearing completed within 45 days; timeline starts after resolution session time is completed.
- Due Process Hearing is like court; rules of evidence, witnesses sworn in, procedures during hearing.





- It is advisable for both parties to have attorneys.
- Hearing Officer decision binding upon both parties

Records of all grievances will be maintained by a designated office staff member. The records will be kept in a separate and confidential file. Information regarding grievances will be classified as private.



## SECTION 18

# OPPORTUNITIES FOR PARENTAL INVOLVEMENT

No topic of discussion in education generates greater agreement than the need for positive parental involvement in the education of our children. Research also shows that Pacific Islander youth in Utah are overwhelmingly influenced by poor family management, family history of antisocial behavior, and family conflict and stress and that these factors are a greater hindrance on their educational achievement than academic failure or commitment to school. (*Source: Utah Board of Juvenile Justice*) This interesting finding can be attributed to environmental stress of western society on an immigrant group in the process of assimilation and to associated economic pressures on the family. However, we believe that these effects can be alleviated and reversed as Pacific Islander families learn new ways of relating to each other in families and in communities. They can find new hope of entering and navigating systems, including education, employment, and business, that are unfamiliar and intimidating. We strive to lead the way and be the catalyst for change in this particular community as we blaze new trails for parent involvement in education.



*Komo mai kau mapuna hoe*

(1836)

"Dip your paddle in." Join in the effort.

## Research

As we began to research ways to involve family and community as a way to boost student success in school and rally support for education in target communities, it became evident to us that most schools do not have a “program” or a system that is reliable or research-based. Efforts to involve parents are usually hit-and-miss and often left up to chance. **At Pacific Heritage Academy we view Parent and Family Involvement as an essential component of school, leadership, and classroom organization.**

In our desire to provide ample opportunities for parents to influence the management of the school and to contribute their unique abilities in ways they feel comfortable we discovered a unique research-based model developed at Johns Hopkins University. The National Network of Partnership Schools (NNPS) is an effort of The Center for Social Organization of Schools (CSOS) which was established in 1966 as an educational research and development center at Johns Hopkins University. Membership in the NNPS (initial \$400 fee, \$200 annually thereafter) enables the organization to assist schools in applying research-based approaches to involving families and communities: exactly what we were looking for! They provide tools, training, and materials that enable schools to plan, implement, evaluate, and improve their programs and practices of partnerships. We feel this model will assist us to develop and implement a research-based and goal-oriented program of school, family, and community partnerships that will become consistent and effective over time.

We have used and will capitalize on the Pacific Islander cultural concepts of taking care of and looking out for each other, working together as community to accomplish tasks important to survival and the common good, as well as enjoying relationships and processes. Indeed the adage “*It takes a village to raise a child*” is true in Polynesian cultures. We feel confident our community members will respond enthusiastically to a call for action in raising the educational experiences and possibilities for all children in our ‘village’ school. The NNPS model will give us the structure we need to set effective goals and to follow through with action and improvement.

## The NNPS School Model

Our chosen model includes four essential elements:

- Setting up an **Action Team for Partnerships (ATP)** within the school organization structure



- Using the **Framework of Six Types of Involvement** in goal development
- Using a **One-Year Action Plan** for Partnerships to detail action plans for each goal
- Being open to continual improvement with the use of an annual **Program Evaluation**

Schools proceed step by step to establish and strengthen their partnership programs. The NNPS has a partnership planner that provides a timeline and sequence of activities to guide schools' ATP through the year.

### **Action Team for Partnerships**

The forming of an Action Team for Partnerships (ATP) will evolve as we set up our Parent and Family Organization (PFO) and identify a school improvement committee. According to the model the program design for involvement must be planned and implemented by an ATP—a committee of educators, parents, and community partners who work together to engage all families and the community in productive ways. With an ATP, teachers, administrators, parents, community members, and others can work together to connect family and community involvement with school improvement goals. The ATP in each school aims to:







- Create a welcoming school environment for families
- Engage families and the community in ways that support student achievement and success

Each school tailors its annual partnership plans and activities to meet its learning goals for students and to meet the needs and interests of its students, parents, and teachers. Each school evaluates its efforts and continually improves the quality of its partnership program over time.

### **Partnership Types**

According to the NNPS model, Six Types of Involvement will be essential to successful partnerships with our parents and families and the Glendale community. Our target population of Pacific Islanders is a unique community of families that already have strong social networks and interdependent relationships. We seek to employ and capitalize on these strengths as we set goals and plan for activity within these 6 types of involvement. A very detailed planning tool is part of the model and helps to define and specify activities that the Action Team for Partnerships (ATP) will implement for all of the Six Types of Involvement to reach specific school improvement goals. We have chosen to set goals by TYPE of involvement. As we desire to empower and utilize the skills and connections of parents and families, we will recruit parents and others as

soon as we are approved, to be part of our Parent and Family Organization. From this group will come the ATP which will put the NNPS model into motion.

<p align="center"><b>Six Types of Involvement: Keys to Successful Partnerships</b></p>	
	<p><u>Parenting</u> Assist families with parenting skills and setting home conditions to support children as students. Also, assist schools to better understand families.</p>
	<p><u>Communicating</u> Conduct effective communications from school-to-home and from home-to-school about school programs and student progress.</p>
	<p><u>Volunteering</u> Organize volunteers and audiences to support the school and students. Provide volunteer opportunities in various locations and at various times.</p>
	<p><u>Learning at Home</u> Involve families with their children on homework and other curriculum-related activities and decisions.</p>
	<p><u>Decision Making</u> Include families as participants in school decisions, and develop parent leaders and representatives.</p>
	<p><u>Collaborating with the Community</u> Coordinate resources and services from the community for families, students, and the school, and provide services to the community.</p>

Epstein, et. al. 2002. *School, Family, and Community Partnerships: Your Handbook for Action, Second Edition*. Thousand Oaks, CA: Corwin Press, Inc.



Using the NNPS model and the above-outlined types of involvement, the ATP will create goals for each involvement type. Some natural opportunities for parent involvement are listed below. These have been written as invitations to parents and families that we would possibly use in a brochure or handout. These activities fit into the NNPS categories as noted and could be written as goals using the goal-setting forms provided by NNPS. (See forms attached)

### **Brochure Narratives Describing Parent Involvement Opportunities**

#### **Welcome to Pacific Heritage Academy!**

Parents and families are absolutely vital to the start-up and future success of our school. Pacific Heritage Academy is a school created by and for the community of Glendale and Pacific Islanders and their neighbors in the Salt Lake City area. Our founders include parents and grandparents who have envisioned and designed a quality choice of education for their children. These families have a contagious love and commitment for educational opportunities that lift and inspire the younger generation. We invite you to partner with us in any of the following activities that will help to make the vision of Pacific Heritage Academy a reality and a tradition for families in Utah. If you care about teaching and preserving culture and bringing out the educational potential within your children, we need you!

#### **Heritage Language Mentor: (Partnership Type 1, 3, and 4)**

Our powerful and unique heritage language program offers students comprehensive instruction in the languages of the South Pacific. An immersive environment can only be created as parents and grandparents lend their expertise as native language speakers in the school and at home. Please give your time to support and interact with students as a *Heritage Language Mentor*. There is no need to know subject matter in the classroom, or be a certified teacher. Your job as a Language Mentor is to provide exposure to your heritage language. As you move about the school, you help create a linguistically rich environment and provide a stabilizing and mentoring relationship that will challenge, encourage, and strengthen our students academically, personally, and culturally through the use and enduring power of language.

#### **Parent Communication Network: (Partnership Type 2)**

Parents are good communicators with each other; let's face it, the 'Coconut Wireless' works! So we're putting parents in charge of communication! We'll rely on you to help get the word out about school events, programs, meetings and more. Even more important than items for your calendar are the communicative messages, written and verbal, between home and school about the progress of your child. Partner with us in



making a two-way communication pathway. We want to know your family and work as your partner in providing exceptional experiences for your child to learn from. Please accept our invitation to get to know your student's teachers and school leaders well. Come to us with any question, concern, or suggestion, or just to "talk story" (Hawaiian slang for 'visiting'). Our School Director has an open door policy and the Board Trustee Liaison is also formally available to you. Thank you for your open and honest communication!

### **Founding, Recruitment, Retention Activities: (Partnership Type 3)**

There are many ways to help prepare for the opening of the school in 2012. Join a committee to get physical facilities ready, work with teachers to prepare lesson plans, help set up the library or the school office, plan activities and events on the calendar, network in the community to inform families of the choice they have to attend PHA, form the parent and family organization, get others excited about a school to call our own! Call a board member today to help open a new and great school for Salt Lake City! No matter your talents, skills, or abilities, WE WANT YOU! There is a committee waiting for your help today!

### **Library Staff: (Partnership Type 3)**

We have designed our library to be a beautiful, inviting, and inspiring place where all members of our learning community can come to enjoy books, maps, art, technologies and other resources that inform and bring understanding to our educational voyages. Our library is overseen by a certified librarian who helps volunteer family members and students to become experts at storing, accessing, and sharing our collection. We will train you to become part of our knowledgeable *Library Staff*. Research shows that parents and families of successful students take opportunities to work in the library setting of their schools.

### **Cultural Resource Guide: (Partnership Type 1, 3, and 4)**

Our academic program teaches and requires students to work hard as they become serious scholars. The teaching methods we support and use at PHA will include the careful design and skillful teaching of unique lesson plans that blend state content requirements and important knowledge that give Roots and Wings to our students. However, our teachers need the input, expertise and support of parents and grandparents, aunties and uncles, in order to infuse *cultural knowledge* into lesson plans, identify opportunities in the home and community that can become learning experiences, and work to become sensitive to and aware of the varied history, language, and cultural values of Pacific people. Become a *Cultural Resource Guide* to your children and to our teaching staff by lending your own voice, cultural knowledge, time and experience, family history, talents, skills and values so these 'gems' can be accurately



taught to and preserved in our students. We ask for your help because we know that you are the first and best teacher of your child.

### **Board of Trustees and Advisors: The Vision Keepers (Partnership Type 5)**

At PHA, parents are encouraged to nominate themselves or other outstanding individuals to serve in vacant trustee positions or on a specialty advisory board. Additionally, parent ideas and support are needed to keep the school running smoothly and in making decisions that affect the programs and governing of the school. Please give your input to trustees and attend board meetings as regularly as possible. We need your ideas and your feedback to make our school the best it can be! See our website for a listing of current trustees, advisory board members, and upcoming board meetings.

### **Parent and Family Organization: (Partnership Type 5)**

At Pacific Heritage Academy our parent organization goes about things The Island Way! It's a whole family affair! Our *Parent and Family Organization* (PFO) involves parents, siblings, grandparents, aunts and uncles and cousins. This organization is the most powerful way we have to advocate for and create opportunities for students. These parents and family members do not rely on or wait for anyone else to provide for their children. They roll up their sleeves and work to make it happen! This group of caring family members carries out vital functions and activities of the school, such as culture festivals, running the school store, organizing guest assemblies, fund raising, travel opportunities, promoting school unity, and extra-curricular activities that include sports, arts, and music. They take the "Roots and Wings" mission of the school personally upon their shoulders and ensure that it is achieved. Contact a PFO officer today to lend a hand or vision and make something amazing happen for your student today!

### **Extra Curricular Activities: (Partnership Type 3 and 6)**

Pacific Heritage School believes that learning doesn't stop when the school bell rings. For our students their education happens anywhere -with anything! We use what is around us to develop Roots and Wings and to become all we can be! Parents and families at PHA are involved in community partnerships to provide learning activities around the year. Check our website for ongoing activities that give Roots and Wings to our students! Give your time to teach your special skill, or share your occupation, take a group of students to your island, or coach your favorite sport. Tell us what you'd like to teach and share at Pacific Heritage Academy!

## **Action Planning and Evaluation**





The NNPS model provides a goal setting/action planning tool and an evaluation tool to assist schools in evaluating their partnership program. We are prepared to use these and feel certain they will help us focus on school improvement. (See attached forms)

**Parent Partners at Work**

The Board of Trustees values the experiences and ideas of the parents who entrust their children to our care. We honor their input by implementing appropriate suggestions for a great school! We believe that as parents have input and involvement their commitment to the school increases and they feel ownership and power to make a difference. A series of meetings were held to discuss the ways that school identity could be developed. The following ideas were grown and we plan for these things to become traditions and important parts of our school culture. We feel this effort demonstrates the power of parent partnerships we are already building. Pacific Heritage Academy truly is a school for the community, made by the community.

**Parent Plan for Building School Identity, Tradition and School Culture**

We have attempted to weave modern standards with traditions of the past that will help families feel welcomed, comfortable and empowered to join our efforts in creating a wonderful school for their children!

**School Identity**

School Colors	Teal, Black, White
School Mascot	Voyagers
School Theme	Voyaging, navigation, way finding and seafaring
School Images	Voyaging canoes, paddles, stars, sun, moon, etc.
School Logo	Sails of a double-hulled canoe on reaching waves



School Motto	“The World is our Campus-- Education, our Voyage.”
School Philosophy	Roots and Wings



## School Mission Statement

*At Pacific Heritage Academy we use the power of education,  
the endurance of language and culture and the virtue of relationships and community  
to help young people on voyages of discovery.*

*Through thoughtful inquiry, challenging curricula, rigorous requirements  
and compassionate service students learn who they are and what they can become.*

*We create learning experiences  
and students find their Roots...  
and their Wings.*

## School Recitation Theme

The main purpose of a school theme is to promote school spirit. The theme is to be recited together as a school family, all faculty and students. It's all about being on the same team and working toward a common goal. School spirit also contributes to students' learning success as the student hears and verbalizes the expectations and goals of the school for the student. Here is a draft of a theme we are working on:

*We are Voyagers.  
Like ancestors of old we are Strong, Inventive, Courageous, and filled with Wonder  
Sailing seas of Knowledge we seek Understanding and use it with Compassion  
Looking forward we honor the Past to better see our Future  
We will find Hope and Success in spite of Wind and Change  
With our Eyes to the Heavens, fixed on Guiding Lights  
We know Ourselves, our Space, our Time  
We will Seek, We will Find, We will Know New Horizons  
We are Mighty Voyagers.*

## School Song

School spirit is strengthened by a school song that is meaningful and evokes a sense of belonging and pride. PHA is pleased to bring music into our school identity and plans to hold a competition among families who will submit tunes and lyrics for our school song.

## School-wide Structures Personalized

As mentioned elsewhere in this proposal, the Expeditionary Learning model is being strongly considered for use due in part to the fact that the model goes beyond providing effective methods for teachers to use, it also includes the use of actual structures within the school that bring students together to develop essential social and leadership skills that prepare students to make contributions in their families and community. We will further the influence of these structures by personalizing them for our target population. A few examples are given here:

*Crew:* The concept of “crew” is implemented as students are grouped in teams that work, play, and learn together. At PHA we will call this “Leauva'a” -the Samoan word for shipmates working together as a crew. This social construct dovetails perfectly with our school theme of voyaging and seafaring. Time spent in their crews or “Leauva'a” helps students understand that they are not just passengers along for a ride but members of a team that must act cooperatively and in unison in order to reach goals and objectives.



*E lauhoe mai na wa'a;  
i ke ka, i ka hoe; i ka hoe, i ke ka; pae aku i ka 'aina*

The Hawaiian saying above is translated to mean:

"Everybody paddle the canoes together; bail and paddle, paddle and bail, and the shore will be reached." If everybody pitches in, the work is quickly done.

*Community Gatherings:* The EL model also prescribes ‘Community Gatherings’ as a way of bringing the learning community together to solve problems, exchange ideas, and make plans of action. Our school will call these “**Village Meetings**” with the intent to simulate island village gatherings but with a modern democratic twist. Our students will learn the nuances and power of the democratic process as they come to express their individual voices in thoughtful discussion. Village meetings give students opportunities to find ways to contribute and communicate positively and

compassionately within the village, to understand and respect rules and authority, and to work towards solutions to challenges and achieving common and individual goals.

These, and other school structures used daily throughout the school provide consistent social experiences that students can and will use in their families and communities outside of school. These create a strong school culture that gives students a sense of belonging and control. For our students, these skills will validate their heritage cultures (give roots) and give new skills (give wings) needed in the 21<sup>st</sup> century.

### Dress Code

At Pacific Heritage Academy grandparents and some parents will be reminded of their school days in the islands when they see their children getting ready for school. In the islands, all children wear uniforms whether at a church or government school. Uniform colors are predetermined by the religious denomination sponsoring the school. For example, in Tonga dark blue is Wesleyan, light blue is Catholic, Orange is Church of Tonga, green is Mormon, and dark red is worn by children in government schools. For many, these colors are still associated with the religious group to which it was assigned. For this reason, in addition to the fact that colors are used by gangs to identify their members and territories, we have chosen to avoid the primary colors often used by other schools. We have chosen instead, to use the color **TEAL** as our school color. Teal is a medium blue-green color- the color of the deepest part of the ocean. It is also fun, vibrant, and 'islandy'. Teal is a timeless, beautiful color carefully reserved in nature as evidenced in the peacock and the deep ocean. The complementary color of teal is coral pink. Our students will look sharp and full of team spirit as they follow a dress code that includes:



**GIRLS:**

Skirts/Jumper/ Pants/Shorts	Shirts (collar, buttons)	Shoes	Aloha Wear
Black	White	Sports shoes	Aloha shorts
Khaki	Teal	Sandals	*Mu'umu'u
	*Black		*Puletsi
	Coral Pink		

**BOYS:**

*Tupenu/Pants/Shorts	Shirts (collar, buttons)	Shoes	*Aloha Wear
Black	White	Sports shoes	Aloha shorts
Khaki	Teal	Sandals	Aloha shirt
	*Black		

**Faculty and Staff:** Adults at PHA will set the standard for students and will be part of our professional team as they adhere to our faculty and staff dress code which includes choices very similar to those of our students.

**Dress Code Notes:**

\* The 'Tupenu' listed for boys dress-up is a wrap-around, skirt-like cloth worn by males in the islands for all formal occasions, similar to the neck tie in American culture. The tupenu is the normal business work attire and is also worn to church. It is ideal for an island climate but Utah Polynesians even wear this in our cold winters! (Tupenu is the Tongan term for this article of clothing. These are also known as sulu (Fijian) and ie faitaga (Samoan).



\* PHA “Aloha wear” is an island tradition tied to modern-day Hawaiians will be a school-issued apparel with a floral design to include school colors. Shirts, shorts, and dress designs (Hawaiian mu’umu’u or the two-piece formal dress worn by Samoan and Tongan women (called [puletsi](#) and [puletaha](#), respectively) will be available. Also see below for information on ‘Aloha Friday’, ‘Aloha Spirit’, and ‘Living Aloha’. We are working to find vendors and local Pacific Islander sewers who might provide us with some of the unique apparel we will need for our students and staff. The following are possibilities:

[www.alohaislanduniforms.com](http://www.alohaislanduniforms.com) (for aloha print items); [www.pacificfashion.co.nz](http://www.pacificfashion.co.nz) (for tupenus)

### *The Tradition of Aloha Friday*

Back in 1946, when the Honolulu Chamber of Commerce first considered the wearing of aloha shirts during the summer months, the business community was still of a missionary mindset: Never mind how hot it is, a proper businessman wears a suit and tie.

But the City and County of Honolulu, and later the territorial government, began to allow employees to wear sport shirts from June through October yearly. Aloha shirts (Hawaiian-style shirts) were allowed only during Aloha Week each fall.

In the early ‘60s, designers came up with shirts in dignified, subdued designs and a clothing manufacturers’ group launched a campaign to institute Aloha Friday. The tradition officially began in 1966 when Wilson P. Cannon, Jr., a Maui boy who was president of the Bank of Hawai’i, started wearing aloha shirts to the office.

Many companies and schools allow their employees and students to “dress down” on the last day of the workweek – on Aloha Friday. The concept of Aloha Friday has spread even to the Mainland, as “casual Friday,” and in some places the trend has moved to wearing Hawaiian-style shirts.

A local singer, Kimo Kahoano, recorded a song called “Aloha Friday.” More than two decades after its release, Islanders still sing along to the cheerful tune that begins, “It’s Aloha Friday, no work till Monday”. Today, aloha shirts are everyday business wear, but knowing that it’s Aloha Friday still gives Islanders, and our learning community, a little head start on the freedom and joy of the weekend together with family and loved ones.

## *The Aloha Spirit*

In Hawaii the Aloha Spirit is considered a state “law.” Well, not exactly, but the definition of aloha spirit and guidance for public officials to remember this philosophy when performing their duties is contained in the *Hawaii Revised Statutes* (State Law).

Although the word law sounds too strict, Aloha Spirit is not such a type of law that will get you in trouble if you break it. Its main purpose is to serve as a reminder to government officials while they perform their duties to treat people with deep care and respect, just like their ancestors did. Aloha Spirit is more a lesson than a law. By learning and applying this lesson to real life, government officials can contribute to a better world, a world filled with aloha. We desire to apply this same “law” or “lesson” at Pacific Heritage Academy where each student, family, faculty, and staff commit to serve one another with that deep care and respect that is a tradition in the islands.

### **Living Aloha**

You have probably heard about Hawaii’s “Aloha Spirit,” but what is it exactly? In the Hawaiian language, “*aloha*” may mean love, affection, compassion, mercy, sympathy, pity, kindness or grace. These sentiments make it a lovely common greeting and expression of farewell.

Living Aloha is the coordination of mind and heart within each person. It brings each person to the self. Each person must think and express good feelings to others.

*Akahai*, kindness to be expressed with tenderness;  
*Lokahi*, unity, to be expressed with harmony;  
*Oluolu*, agreeable, to be expressed with pleasantness;  
*Haahaa*, humility, to be expressed with modesty;  
*Ahonui*, patience, to be expressed with perseverance.

“Aloha” is more than a word of greeting or farewell or a salutation at Pacific Heritage Academy. “Aloha” means mutual regard and affection and extends warmth in caring with no obligation in return.

“Aloha” is the essence of relationships in which each person is important to every other person for collective existence.

*"Aloha to learn what is not said, to see what cannot be seen & to know the unknowable."*  
Queen Lili'uokalani

We hope all our students, their families, faculty, and staff will embrace the spirit of *aloha* in their everyday lives; for it is not a gift only for those who visit Hawai'i, it is a gift which can be shared throughout the world. We will **Live Aloha**—and pass it on!



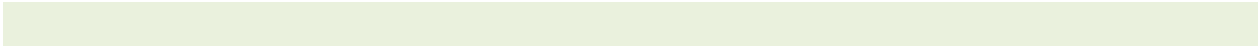




**ONE-YEAR ACTION PLAN FOR PARTNERSHIPS**  
 (SCHOOL LEVEL, FORM T-TYPES)  
**SCHEDULE OF ACTIVITIES FOR THE SIX TYPES OF INVOLVEMENT**

The One-Year Action Plan for Partnerships includes activities that are *presently* conducted at the school and *new activities* that will be implemented this year to strengthen the six types of involvement. For each type, outline the activities, dates, responsibilities, expected results and measures, and needed resources.

School: Pacific Heritage Academy			School Year: 2012		
<b>TYPE 1 - PARENTING:</b> Assist families in understanding child and adolescent development and in setting home conditions that support children as students. Also, assist schools in understanding family backgrounds, cultures and goals.					
Type 1 Chair or Co-Chairs:					
Which school improvement goals will be addressed by strengthening Type 1- Parenting activities?					
TYPE 1 ACTIVITIES (2 or more, continuing or new)	DATE OF ACTIVITY	GRADE LEVEL(S)	WHAT NEEDS TO BE DONE FOR EACH ACTIVITY & WHEN?	PERSONS IN CHARGE AND HELPING	EXPECTED RESULTS? How will results be measured?
Note if funds, supplies, and/or resources are needed for these activities?					
Add pages to outline more activities that support THIS goal.					



## SECTION 19

# EDUCATOR QUALIFICATIONS

Pacific Heritage Academy seeks to attract qualified teachers, administrators, and staff to provide a rich learning community to meet the needs of each student. All will be encouraged to use their skills, ideas, and creativity to further the mission of the school.

### Teacher Qualifications

As required by the State of Utah, all teachers will be licensed certified teachers or be qualified to teach under USOE's alternative certification or authorization program (R277-520.) Teachers will be licensed or certified by the State of Utah and meet (or be working toward meeting) highly qualified standards as determined by NCLB as outlined in R277-510. We also anticipate the use of teachers who will hold a School-specific License or are qualified by Letter of Eminence to teach subjects or in areas where we cannot find licensed persons. These alternative means of licensing may be used to qualify teachers in the areas of heritage languages and cultural topics such as cultural history and arts including music, dance and folk art classes. As stated in Utah Administrative Code, Rule R277-520, this authorization will allow individuals with exceptional training or expertise, consistent with R277-520-1F, to teach or work in the public schools on a limited basis.

- K-3 teachers will hold a Level 1, 2, or 3 license with an early childhood area of concentration.
- Grade 1-6 teachers will hold a Level 1, 2, or 3 license with an elementary area of concentration.



- Grade 7-8 teachers will hold a Level 1, 2, or 3 license with a middle-level area of concentration and endorsement in the assigned teaching subject.

Teachers will become skilled in the use of innovative teaching methods including experiential and project-based learning. Teachers will attend workshops and conferences throughout the year as determined by the Director and School Board.

Teachers will exhibit a commitment for Pacific Heritage Academy's mission, philosophy, and goals.

Teachers will agree to teach Pacific Heritage Academy curriculum including Pacific Islander culture and Pacific Heritage Languages as approved by the School Board, while meeting curriculum core required by the State of Utah.

Teachers will be expected to cooperate with other teachers in teaching teams according to grade levels.

Teachers will be innovative, resourceful, and strong in their area of expertise as they create learning expeditions and educational experiences for their students using the EL model.

As stated earlier, due to the specific nature of our curriculum and cultural focus, we will also hire part-time staff with "eminence authorizations" based upon state clearance and consistent with R277-520-5.

Teachers who have not met the standards of highly qualified will work with the Director to accomplish that designation in a reasonable amount of time.

We expect that our faculty will have a passion for the mission of our school.

### **Paraprofessionals Qualifications**

Paraprofessionals, individuals who work under the supervision of a teacher or other licensed/certificated professional, will be highly qualified as determined by NCLB. Paraprofessionals at Pacific Heritage Academy must meet one of the following qualifications:

- Complete at least two years (minimum of 48 semester hours) at an accredited institution of higher education.



- Obtain an Associates (or higher) degree from an accredited institution of higher education.
- Meet a rigorous standard of quality and demonstrate knowledge of and the ability to assist in instructing reading, writing, and mathematics, through a formal state assessment.

Those who are proficient in English and another language who provide translator services and those who have only parental involvement or similar responsibilities will not be required to meet the above qualifications.

### **Teachers' Aides and Volunteers**

Under the direction of the teacher, parent volunteers and aides will work as in-school tutors to assist student who need additional help as well as provide additional assistance to their assigned teacher(s). Aides will assist with one-on-one assessments throughout the year, thus helping teachers to track the individual progress of students. Parent volunteers will be used whenever possible for extra-curricular activities. Parent volunteers are required to complete and pass the Utah State Division of Risk Management Driver Training Program, secure the proper vehicle insurance and have satisfactorily completed a background check.

### **Other Standards**

To ensure the safety of students at Pacific Heritage Academy, all individuals (including staff, coaches, parents, etc) who have significant unsupervised access to students will be required to satisfactorily complete a background check consistent with 53A-3-410.

Pacific Heritage Academy will not discriminate against any candidate for employment on the basis of gender, race, color, national origin, religion, age, or disability.

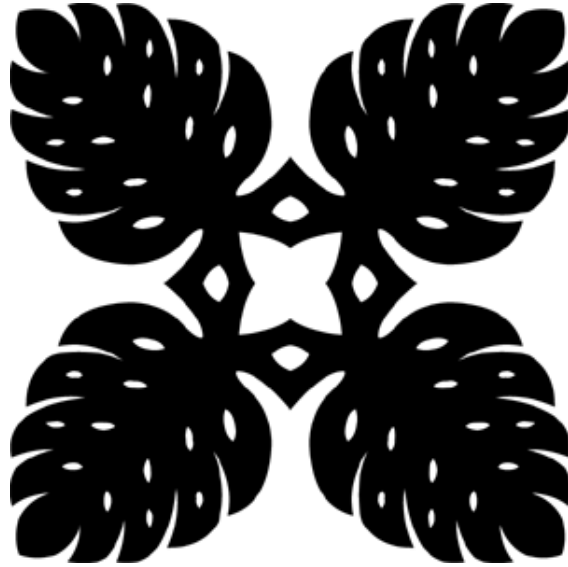
## SECTION 20

# ADMINISTRATIVE SERVICES

Pacific Heritage Academy has designed an Administrative Services Plan that supports its unique mission to educate an underserved, hard-to-reach, multi-cultural population of Salt Lake City. Our plan for administrative services strives to maintain our values of teaching and honoring all cultural heritages, and for educating our students in a way that prepares them to be global leaders and learners in the 21<sup>st</sup> century.

Our plan is based on four “kuleana” or responsibility/specialty areas. We have chosen to use a Hawaiian quilt pattern of a tropical leaf to represent and to teach our school community about the four areas of our administrative plan. Hawaiian Quilting is a cultural art form which evolved from sewing skills taught by early Christian missionaries to the islands. Hawaiian quilts are famous for very fine detail in the handiwork as well as their unique reflection of nature and culture. The quilt pattern also shows the need for all parts to work in a collective effort to produce the desired results of effective leadership and management of Pacific Heritage Academy. The four administrative areas are:

- Educational Programs
- Student and Family Support Services
- Facility Services
- Business Services



Resources have been committed for each of the four areas and are detailed in the budget section. Because Pacific Heritage Academy believes in the benefits of being a small school we plan to administer our educational program with a minimum number of administrative staff, especially in the early years. Our school will be efficiently run by a few strong leaders and staff who work together to share many of the responsibilities traditionally held by many individuals in a larger school and district. For example, an Assistant Director is budgeted for hire the second year of operations. Until this position is filled, the Administration, Governing Board, and Staff will share additional responsibilities to sufficiently support the Director. Each area of the Administrative Services Plan is defined below in terms of its Functions (areas of oversight) and its Crew (working committee). A related organizational chart is provided at the end of this section.

### **Educational Programs**

Whether we use Expeditionary Learning Schools (ELS) or other resources for professional development, we will have an on-site, qualified Curriculum Consultant (EL calls this person a 'School Designer') who consults and trains in all educational programs, including Professional Development, Curriculum, and Expeditions. The School Designer encourages the use of innovative teaching methods to improve student learning and provides appropriate educational resources and numerous training opportunities to the faculty. A proposed MOU from ELS is included in Section 7: Budget. Additional administrative support is provided by a Crew including the Director, Assistant Director, and Adventure Coordinator. Specific areas of oversight



and responsibilities for the School Designer are listed below as are the Functions of the Educational Programs Crew.

<b>School Designer Functions</b>	<b>Specific Responsibilities</b>	<b>Crew</b>
Instructional Guide	Train in methodology	Assistant Director
Curriculum Consultant	Assist with curriculum development Ensure curriculum exceeds state core requirements Stay current on innovative teaching methods	
Fieldwork	Assist in off-site field work planning, safety(including camping)	Director, Assistant Director, Adventure Coordinator
Supervision and Improvement of Instruction	Provide on & off-site professional development Review student and teacher portfolios Review student and teacher portfolios Conduct evaluations & mentoring Provide assistance and support to faculty members	Assistant Director
Interpretation of Student/School Performance	Monitor student and school performance and progress	Director
Community relations	Develop community relations	Director, Governing Board, Advisory Board
Professional development	Ensure all staff has a Professional Development plan Provide on & off-site training opportunities	Director
Special Education	Support school-wide program development	Special Education Coordinator, Director
Student & Staff Counseling	Assist with development of assessments & diagnostics	Counselor, Director

## Student and Family Support Services

The Director will oversee all Support Services extended to students and their families. These services aim to support and enable the effective administration of educational programs in the school. The Director is the student advocate and parent liaison and endeavors to create positive relationships between the school and other organizations within the community. The Director is ultimately responsible for the positive school culture and its reach into the community. The Director receives additional administrative support from a Crew including the Assistant Director, Governing Board, as well as the Operations Assistant. Specific areas of oversight and responsibilities for the Director and the Crew are listed below.

<b>Director Functions</b>	<b>Specific Responsibilities</b>	<b>Crew</b>
Employment Issues	Recruit, interview, and recommend staff for hire Supervise faculty & staff Revise the Faculty Handbook yearly Recommend faculty raises Terminate faculty & staff employment, as directed by the board	Director, Governing Board
Teacher Support/Assistance	Conduct staff evaluations Provide staff mentoring	Assistant Director
Student Advocate	Oversee student enrollment & placement Develop/Support school-wide discipline policies Revise Student Handbook yearly Oversee student fees Coordinate student-led conferences	Assistant Director, Governing Board
Parent Liaison	Coordinate volunteer program Oversee and/or conduct parent education programs	Assistant Director, Governing Board
Records Management	Manage student information in SIS Adhere to GRAMA Act; confidentiality	Assistant Director, Governing Board, Operations Manager
Certification Verification & Background Checks	Conduct volunteer BCI's Verify teacher certification via CACTUS	Operations Manager



## Facility Services

Facility Services includes functions necessary for the school building and grounds to be kept safe and in good repair. Many of these responsibilities will be contracted out to other providers and will be overseen by the Director. Managing equipment and supplies is also part of Facility Services and is overseen by the Director to ensure responsible use and care of school assets, facilities, and funds and managed by the Operations Manager and Business Manager. Additional administrative support is provided by a Crew including staff, and parent volunteers. Specific areas of oversight and responsibilities for the contractors and Director are listed below as are the Functions of the Facility Services.

<b>Contractor Functions</b>	<b>Specific Responsibilities</b>	<b>Crew</b>
Operation & Maintenance Of School Plant	Custodial services Maintenance services	Director
Manage IT/Infrastructure	IT services	Director
<b>Director Functions</b>	<b>Specific Responsibilities</b>	<b>Crew</b>
Manage Equipment & Supplies	Oversee inventory levels & other assets	Operations Manager, Parent Volunteers

## Business Services

A Business Manager will be hired to oversee the function functions included in the business and fiscal management, ensuring responsible use and care of school assets, facilities, and funds via required reporting, accounting, budgeting, purchasing, etc. Additional administrative support is provided by a Crew including the Operations Manager, Director and Governing Board. Specific areas of oversight and responsibilities for the Business Manger are listed below as are the Functions of the Business Services.

<b>Business Services Functions</b>	<b>Specific Responsibilities</b>	<b>Crew</b>
Preparation & Completion of	Execute reporting for managerial & statutory requirements	Director, Governing Board, Operations



Federal & State Reporting	Coordinate annual financial audit	Manager, Business Manager
Accounting	Maintain timely and accurate accounting records Prepare financial statements (report budgets vs. And itemized expense to board on monthly basis) Ensure adequate internal controls Manage budgeting and purchasing processes Manage school's holdings (treasury) Update the Accounting Manual yearly Attend School Finance & Statistics training	Director, Governing Board, Operations Manager, Business Manager
Employment Issues	Manage Payroll, Benefits, and Human Resources Ensure compliances with Federal and State employment laws	Director, Governing Board, Operations Manager, Business Manager
School Lunch Records	Manage and submit data, as needed	Operations Manager

**Budget for Administrative Services**

Professional development and Learning Expeditions are key to the successful implementation of Expeditionary Learning, a strong model and possible choice for PHA. ELS and Pacific Heritage Academy view teacher development and collaboration as essential in promoting student achievement. As such, a large portion of the budget is dedicated to professional development. Learning Expeditions require readings from various original sources rather than relying on textbooks. Therefore, spending on textbooks is limited to Math and Language Arts, which allows for a more significant amount to be spent on programs that support our mission and student academic achievement, such as Professional Development and Expeditions. For these reasons, amounts budgeted to these categories are significant in comparison with alternative school designs. Included in the Professional Development (330) category is a possible ELS contract (a proposed MOU is included in this proposal) which includes the on-site, qualified School Designer/Consultant who consults and trains in all educational programs, including Professional Development, Curriculum, and Expeditions. The School Designer also provides appropriate educational resources and numerous



training opportunities to the faculty and numerous on and off-site training opportunities for teachers. Travel costs as they relate to professional development are captured in the Travel (580) category. Instructional & Other General Supplies (610) budgets for learning expeditions, which includes classroom supplies and equipment necessary to facilitate topic-specific, trimester-long investigation and discovery. A significant portion of Expedition funds also covers student fieldwork (off-site field trips intentionally designed to facilitate first-person research).

Salaries (100) include an Assistant Director and is budgeted for hire the second year of operations. Until this position is filled, the Administration, Governing Board, and Staff will share additional responsibilities.

Pacific Heritage Academy understands the importance of removing learning barriers and creating open minds and the critical role counselors play in facilitating this change. A part-time counselor for our primary grades (K-6) will be made available on an as-needed basis as a contracted service. A licensed counselor for grades 7-8 will be provided through one of the following options: 1) leveraging dual-certification of teacher, staff, administrator, etc., 2) counseling coalition with area schools, or 3) contracting services with an educational management company. Budget for counselors is accounted for in Salaries (100).

Administrative Services in Support of Management (310) includes a budget amount for a Business Manager to ensure the responsible use and care of school assets, facilities, and funds.

Function	Budget Categories	Year 1	Year 2
Educational Programs	Professional Development (330)	60,000	60,000
	Travel (580)	10,000	10,000
	Instructional & Other General Supplies (610)	20,000	10,000
Support Services	Salaries (100)		
	Director	60,000	65,000
	Assistant Director (part time)	32,000	35,000
	Operations Manager (part time)	30,000	32,000
	Secretary (part-time)	15,000	16,000
	Teacher-Special Ed (100)	40,000	41,000
	Counselor (Certified, part-time)	15,000	15,000



Facility Services	Custodial Services (400) (part-time)	20,000	20,000
	Buildings (Maintenance) (700)	2,000	2,000
	Website Development (Including IT Services) (300)	23,000	15,000
Business Services	Administrative Services in Support of Management (310)	60,000	60,000

### *Job Descriptions and Qualifications*

Having sound administrative health will allow Pacific Heritage Academy to attain the academic, cultural, and character goals of the school. Outlined below are job descriptions and qualifications for Pacific Heritage Academy’s Administrative Services positions.

#### **Director**

Job description - The Board seeks a Director to participate in the development of a new charter school and whose experience, knowledge, and drive will set the tone for a supportive school climate that challenges and motivates students, teachers, and families to achieve academic excellence. The Director oversees the overall administration and management of the school including, academic programs, school vision, staffing, and culture development, with particular emphasis on: planning and evaluation, policy development and administration, personnel and fiscal management, and parent and community relations. Additionally, the director will ensure the chosen school design, possibly Expeditionary Learning, curriculum and philosophy are implemented throughout the school community.

#### Responsibilities

- Attend Board meetings and Report directly to the Board of Trustees.
- Recruit, interview, and recommend for hire all school staff, including teachers and support staff.
- Create an effective team responsible for attaining school goals and committed to achieving excellence.
- Oversee development and implementation of personnel policies and actions
- Work with teachers to continually assess and evaluate teaching performance and results; including observing classes regularly, providing feedback, and coaching.
- Oversee the successful implementation of professional development programs to meet the needs staff at all levels of development.



- Assume responsibility for fully implementing the methodology and program design at a high level so that the school is high performing.
- Model a commitment to on-going professional development by participating in various conferences, institutes, summits, on/off site trainings, etc.
- Develop organizational goals and objectives consistent with the mission and vision of Pacific Heritage Academy and evaluate effectiveness of resulting programs and systems.
- Ensure compliance with full scope of government regulatory requirements
- Manage student recruitment and enrollment process
- Perform duties related to student discipline.
- Setup assessment strategies to ensure AYP and academic goals are met.
- Oversee the day-to-day management of the school site and the effort to ensure the health and safety of all students, faculty and staff
- Collaborate with the Operations Assistant and Board on the budgets, charter and other legal compliance issues
- Develop and maintain open channels of communication with students, parents, staff, and community members.
- Work with parents to achieve maximum involvement in support of student performance and success
- Keep the Board apprised of issues impacting the school's development
- Maintain positive relationships with community organizations, businesses, other schools, USOE, and the Utah charter community
- Obtain additional funding to help accomplish the school's stated objectives.

### Qualifications

- Masters degree or higher with significant experience in a school or business setting where restructuring efforts were required *or*
- At least five years secondary education or other management experience in a school, business, nonprofit, or public organization will be considered without benefit of post-graduate degree *and*
- Prior experience in hiring and human resources preferred
- Ability to form productive relationships with students, families, and staff.
- Demonstrated success managing staff through planning, motivating, rewarding, and providing targeted feedback and professional development
- Extreme flexibility to accommodate multiple priorities and a strong work ethic to accommodate a high level of responsibility
- Communication and interpersonal skills to provide clear leadership within a highly collaborative school environment.
- Experience supervising and evaluating staff
- Experience managing schedules and budget to reflect a school vision.



- Experience or strong familiarity with Expeditionary Learning School design model among other possible models. Participation in pre-service training and on-going professional development; including, National EL conference, onsite EL training, EL Leadership training, and Assessment Masters Class; USOE Business Manager training.
- Deep commitment to the mission, values, and goals of Pacific Heritage Academy. Language skills/proficiency in a Pacific Islander language are highly desirable.

## **Assistant Director**

Job description - Outstanding opportunity for an administrator who desires to combine an interest in curriculum with the leadership role associated with the position of assistant director. Under the direction and supervision of the Director, the Assistant Director will perform management duties that require the use of sound, independent judgment. In addition to building management duties, the successful candidate will play a lead role in the development of school curriculum, the improvement of instruction, and building level assessment. A team approach with the Director and other administrative staff will be strongly emphasized. He/she will coordinate with and substitute for the Director in the absence of the Director.

### Responsibilities

- Assist Director in his/her responsibilities
- Act for the Director in the Director's absence, including attending internal and external meetings, conferences, activities and events
- Ensure teachers receive proper training of Expeditionary Learning or other principles, designs, and models chosen
- Approve lesson plans/expeditions prior to the beginning of each trimester
- Coordinate teacher evaluations
- Long-range planning of the academic program, in conjunction with the Director and others
- Establish and maintain effective and collaborative working relationships with all staff, students, families, the school district, the public and representatives of community agencies
- Carry out oral and written instructions and perform other related duties as requested by the Director

### Qualifications

- Master's Degree or higher with significant experience in a school or business *or*

- At least three years secondary education or other management experience in a school, business, nonprofit, or public organization will be considered without benefit of post-graduate degree *and*
- Ability to form productive relationships with students, families, and staff.
- Demonstrated success managing staff through planning, motivating, rewarding, and providing targeted feedback and professional development
- Extreme flexibility to accommodate multiple priorities and a strong work ethic to accommodate a high level of responsibility
- Communication and interpersonal skills to provide clear leadership within a highly collaborative school environment.
- Participate in pre-service training and on-going professional development as requested by Director; including, EL conference (lesson planning and expeditions templates), leadership training, and Masters class on teacher evaluations
- Deep commitment to the mission, values, and goals of Pacific Heritage Academy

### **Curriculum Director**

If chosen, Expeditionary Learning Schools (ELS) supplies an on-site, qualified School Designer who consults and trains in all educational programs, including Professional Development, Curriculum, and Expeditions. Whether EL School Designer or other consultant, this Curriculum Director encourages and models the use of innovative teaching methods to improve student learning and provides appropriate educational resources and numerous training opportunities to the faculty. A proposed MOU from ELS is included here.

### **Counselor**

Job description - Provides support services to students, staff, and parents. Support services include referrals, counseling, assessment, diagnostics, and report writing. This work takes place at the school site, in other public buildings, and in private residences. Additional responsibilities include student roistering/scheduling, maintaining individual student Education Plans, etc.

### Responsibilities

- Assist students in the areas of academic development, career development, and citizenship development, as well as emotional and social development
- Collaborate with faculty, staff, and parents to better understand and meet the needs of all students



- Provide individual and small group counseling as needed
- Make appropriate referrals of students and parents to outside agencies and specialists when necessary
- Make self a visible body in school by participating a variety of activities that contribute to the schools effectiveness
- Continually plan, evaluate, and revise the school counseling program
- Pursue continuous professional development and growth
- Promote an understanding and appreciation for diverse populations
- Develop, review, and revise career and educational plans for student, as needed
- Monitor and advise students and parents as to progress toward promotion
- Prepare students for transition to next level (middle to high school)

### Qualifications

- Masters degree or higher in school counseling or closely related field; standards for Utah School Counselor Education Programs must be met
- Experience providing the service necessary by this position required
- Proven ability to work collaboratively with a diverse team of teachers
- Professional demeanor, strong work ethic, detail-driven work style with excellent organizational skills
- Ability to prioritize, multi-task, delegate, and lead by example
- Commitment to the mission, values, and goals of Pacific Heritage Academy

### **Operations Assistant**

Job description – Pacific Heritage Academy is seeking an Operations Manager to manage the daily operations of the school and act as the central point of contact between the school and the support team. This position requires a self-motivated, team-oriented individual with a strong attention to detail, excellent organizational skills, and solid word processing and database capabilities. Moreover, this individual must truly enjoy working with students and young adults.

### Responsibilities

- Manage all aspects of attendance and student records, including generating daily attendance reports for the student information system
- Coordinate and track new-hire paperwork, for substitute teachers, hourly employees, and part-time employees, ensuring a smooth on-boarding process
- Participate in pre-service training and on-going professional development as requested by Director; (USOE training on CACTUS, SIS, & GRAMA)





- Administer procedures for purchasing inventory and school supplies, accounts payable, monthly timesheets for payroll, and other financial activities
- Answer phones and interacting with students, parents, prospective families, and visitors in a friendly, professional, and informative manner
- Manage the front office; assisting with faxing and copying, and maintaining student, office, and accounting files
- Check in late students and making daily attendance calls when necessary
- Demonstrate knowledge of and support for Pacific Heritage Academy's mission, standards, policies and procedures, and code of ethical behavior
- Provide administrative and special project support to the director

### Qualifications

- Prior school secretary experience preferred
- Knowledge of school district reporting requirements preferred
- Strong computer skills, including with Microsoft Office (Word, Excel, PowerPoint, etc)
- Thrive in a fast-paced, dynamic work environment
- Work well independently and as a team member as required
- Have excellent oral and written communication skills, strong interpersonal skills, discretion, and a willingness to learn
- Proven attention to detail and time-management skills, as well as be organized, detail oriented and able to multi-task.
- Be able to identify and resolve problems resourcefully
- Commitment to the mission, values, and goals of Pacific Heritage Academy

### **Special Education Coordinator**

Job description - Coordinates the Pacific Heritage Academy Special Education Program school-wide, including support for teachers in inclusion classrooms and substantially separate classroom. Supports special education administrative functions, including IEP development and implementation.

### Responsibilities

- Assess students with special needs and assist teachers in identifying students with special needs
- Review intake assessments of new students; ensure all IEP and other records transfer from other schools

- Oversee (write, monitor, and maintain) the proper implementation of all student IEPs within guidelines of IDEA 2004 and other internal and external special education paperwork and follow all mandated timelines
- Facilitate contracts with additional professional help to carry out IEP requirements, as needed
- Confer with parents, administrators, testing specialists, social workers, and professionals to develop IEPs designed to promote students' academic, physical, and social development
- Meet with parents and guardians to discuss their children's progress, and to determine their priorities for their children and their resource needs
- Coordinate review of student IEPs with general classroom teachers and offer detailed recommendations on successful techniques for meeting accommodations
- Present professional development that will help all teachers incorporate learning techniques in their classes that are beneficial to all students
- Support classroom teachers in developing and planning curriculum and modifications for students; including developing flexible groups for students and scheduling pull-out services only on an as-needed basis
- Employ special education strategies and techniques during instruction to improve the development of sensory- and perceptual-motor skills, language, cognition, and memory
- Host annual Child Find training for all Pacific Heritage Academy staff
- Participate in pre-service training and on-going professional development as requested by Director (including USOE Annual Training on Child Find IEP delivery)
- Ensure compliance with all state and federal special education requirements; Work with school designers to ensure proper ADA compliant school facility
- Ensure Expeditionary Learning or other teaching and learning principles are followed for Special Education operations
- Participate in pre-service training and on-going professional development as requested by Director (including USOE Special ED trainings and EL Masters Class on Special Needs training)

### Qualifications

- Utah Special Education Certification and must meet EYE (Entry Years Enhancement) requirements
- A Bachelors degree or higher, coursework and/or certification in Special Education
- Masters level advanced degree preferred



- Three to five years of special education teaching and educational leadership experience required
- Cross-categorical certification (LD/ED) required
- Knowledge and understanding of the elements of IDEA 2004 required
- Extensive content knowledge and experience working with special needs students
- Classroom management expertise
- Proven ability to work collaboratively with a diverse team of teachers
- Professional demeanor, strong work ethic, detail-driven work style with excellent organizational skills
- Ability to prioritize, multi-task, delegate, and lead by example
- Commitment to the mission, values, and goals of Pacific Heritage Academy

## **Business Manager**

Job description –Under the general direction of the governing board and director, the Business Manager oversees all operations in connection with financial matters, including accounts receivable, accounts payable, payroll and auditing. Trains Operations Manager, Board members, and Director concerning financial processes and procedures. The Business Manager develops and implements all internal control procedures and policies to ensure that the school’s financial system is accurate, efficient, and aligned with all state and federal laws and regulations.

### Responsibilities

- Setup accounting system including AP, Payroll, AR, and Reporting; Develop and maintain timely and accurate accounting records for school
- Perform accounting processes and maintain the chart of accounts
- Create and implement accounting manual, including procurement procedures and control measures for public funds in accordance with applicable state and federal procurement laws, guidelines, and school procedures
- Prepare and maintain reporting timeline and execute reporting for all financial managerial and statutory reporting requirements
- Prepare monthly, quarterly, and annual financial statements (Statement of Financial Position, Statement of Activities, Statement of Cash Flows), including budget to actual analysis including variance explanations.
- Ensure budget is board approved and being followed
- Coordinate annual financial audits, and any other reviews by the USOE, Federal, or other agencies.



- Manage cash processes, including contributions, receivables, grants, funding and deposits.
- Perform monthly account reconciliations and obtain appropriate reviews and approvals.
- Monthly payroll processing; Act as benefits coordinator including tracking of personal time off and coordination of annual benefits enrollment.
- Work with the Board and Director to ensure adequate controls are in place (e.g. segregation of duties and documentation of control points); Develop administrative systems and procedures.
- Participate in pre-service training and on-going professional development as requested by Director; Remain current in the use and management of requisite technology (including USOE, auditor, and Charter Star finance trainings)
- Maintain adequate insurance coverage ensuring compliance with any requirements.
- Other duties as assigned by the Director

#### Qualifications

- A Masters degree in Business, Accounting, or Finance
- Minimum four years experience in a field related to business or finance, or 10 or more years in the field of business or financial management
- CPA or MBA preferred
- Substantial knowledge and experience of small business and non-profit accounting
- Knowledge and experience of budgeting and government reporting
- Experience with USDA School Lunch Program
- Experience in Audit, 501(c)(3) and form 990
- Understanding of payroll functions and reporting (941, 940, W2, 3, 4)
- Professional, personable, flexible, and ability to work effectively with a wide variety of individuals and groups
- Excel or Database proficiency a must.
- QuickBooks or other accounting software experience a plus
- Experience in charter school or business management preferred
- Commitment to the mission, values, and goals of Pacific Heritage Academy

## SECTION 21

# LIBRARY AND INFORMATION SERVICES PLAN

The Library and Information Services Plan for Pacific Heritage Academy has been designed using the guidelines of the Northwest Accreditation Commission standards for elementary schools in order to build a strong resource for our community of learners and to ensure compliance with their well-respected standards. Several qualified individuals from the field of library science and instructional media have helped us to personalize this plan as a key component to achieving our mission to give *Roots and Wings* to our students. Our goal is to increase the comfort our students feel for books and learning as we offer an inviting and comfortable learning atmosphere where a variety of print and other resources and technologies that will help our community of learners to explore and come to better understand their world.

In particular we will build and maintain an inviting and user-friendly library known for its Pacific Island and multicultural folk literature for children, a Pacific heritage languages collection, as well as a collection of international maps and world geography resources. We feel fortunate to also have access to and will utilize the Salt Lake City and County libraries which are consistently ranked in the top three nationally. The state of Utah spends over a million dollars each year on a collection of databases (called "Pioneer") for all residents. We intend to fully utilize this digital collection in our studies and in our training of youth to wisely and efficiently access information in the 21st century.

### **Regular and Frequent Access**

In order to give our students, faculty, and support staff regular and frequent access to library facilities with its books and other information services and programs by creating an inspiring and welcoming place. Our architectural plans include placing the library in an area to include views to the outdoors with proximity to the hub of school activity yet secluded enough to offer peace and quiet. We will reduce cultural barriers by making this space warm and comfortable with inviting seating options, beautiful world and cultural art, areas for read-aloud groups and storytelling activities, quiet individual reading corners, and research tables with computer access and space to study map materials. We will carry on our theme of *voyaging* as well as the school's mottoes, "*Giving Roots and Wings*" and "*The World is Our Campus*" in our décor and interior design. This area of discovery and reflection will become an integral part in the educational experience at Pacific Heritage Academy.



## Library Staffing

We will further encourage comfort of the school community with written materials and modern information sources by providing access to this area before, during, and after school hours. This may seem like a lofty goal when considering restricted budgets; however, we have devised a creative and strategic plan to use a *team of volunteers*, parents and family members who will work widely under the direction of our *certified library media specialist*, who will be hired full time by the third year of operation. According to a recent report in Education Today, parent involvement in the elementary school library seems to increase participation and comfort of parents in their child's education. Similarly, the use of student workers in the library areas of schools is thought to improve student's involvement and feelings of comfort academically.

## *Our Curriculum-guided, Technology-supported Resource Development Plan*



The Expeditionary Learning model, as well as other learning and teaching methods and models, requires that thematic units be built upon and include access to academic journals, original source documents, and literature selections that help students develop background knowledge, inform and enrich, and anchor student experiences in their studies. We will build and develop our library with resources and materials which support and enrich the wide variety of learning expeditions (thematic units of study which are our curriculum). Because expeditions are original creations built jointly by teacher teams, often with input of their students, and based on local issues, people, and places, *our library will grow over time and in directions which reflect the expeditions designed specifically for Pacific Heritage Academy.*

We anticipate a wide variety of fascinating expedition themes and topics, from the study of South Pacific Navigators or the making of Polynesian Tapa (bark) cloth to the Founding Fathers of the United States and the history of war in Ancient to modern times. Our library therefore will contain literature from varied places around the world, maps and artifacts documenting the peoples and cultures of the world, and non-fiction sources to grow the interests and abilities of our students. Because all good project-based learning involves student-created products as part of project learning our library will also include a unique collection of student products created and donated by our own homegrown authors, illustrators, and artists as they express and share their learning and growth.

### **Technology and the Library**

The PHA Technology Plan, as detailed in Section 22, supports the needs of our curriculum plan and interfaces with our library design. The use of experience-based learning will require that students have access to and learn how to research high-quality original information that instructs and informs our learners. Our library will also be accessible as a media center where students can practice and use a wide range of technologies to learn, create, and communicate. As explained, PHA will provide computer access for our learners via a mobile lab of laptop computers with wireless connections. This enables the classroom, the neighborhood, or the library to become an instant media center on-demand. Our library area can therefore become, for example, an international cafe' where students engage in recurring video-discussions with students in Pacific Rim nations, or a conference room where a student presents his research findings to Board of Trustees. These technology and telecommunication skills can be learned and practiced in our library/media center.



## **Independent Inquiry**

The Expeditionary Learning model, as well as other models under consideration, effectively encourage and challenge independent inquiry as teachers and students explore and learn through their investigative studies. Our library plan supports the unique features of our instructional program as it provides a place for discovery and reflection. Additionally, it is a central and dependable place where the learning community is able to access documents, texts, and other sources for information that inform and enrich and guide the exploration of subject areas and compelling topics of expeditions. This process of exploration will help our students become independent and life-long learners who know how to pursue answers to their questions and wonderings about people and the world around them.

## **Policies and Procedures**

We will be guided in implementing our plan by the use of policies and procedures for the selection, collection, and removal of information sources as well as those guiding the use of technology and internet resources. (See attached to this section)

In summary, the following standards set by the Northwest Accreditation Commission will be met with the action plan described above:

- Students, faculty, and support staff have regular and frequent access to library/information services, facilities, and program as an integral part of their educational experience before, during, and after school hours.
- The program is directed by a certified library media specialist.
- The program fosters independent inquiry by enabling students and faculty to use various school and community information resources and technologies.
- We have policies in place for the selection and removal of information resources and the use of technology and the internet.





## Acceptable Use Guidelines for Technology Resources

### At Pacific Heritage Academy

*(Students and Parents to read and sign this use agreement)*

Technology resources at Pacific Heritage Academy include computing and telecommunication equipment, file servers, computer networks, information systems, other computing and telecommunication resources, other equipment such as scanners, digital cameras, video projectors, and video cameras, and the Internet, are viewed as *instructional tools for learning*.

Policies and procedures outlined in the Code of Student Conduct also apply to the use of all technology resources at the school. Using technology resources includes using a single computer, a computer on a local area network, a computer on the wide area network, or a computer to access the Internet. This set of guidelines is intended to assist users in following established practices and procedures to use technology resources in a responsible and productive manner.

Expectations: Any student who is a user of the school system provided technology resources is expected to use the resources for educational purposes only. Any use of the school system provided technology resources and the Internet should always reflect academic honesty, high ethical standards, and moral responsibility.

Students must promise to follow these rules in order to use technology and technology related resources in the school system.

1. I will use technology to learn about or complete assignments.
2. I will use the Internet only with adult supervision, my teachers, the media coordinator, or the technology teacher.
3. I will only look for information on the Internet that is school-related.
4. I will abide by the Code of Student Conduct while using the Internet at school.
5. I will use good manners when using technology. This includes:

- a) Being polite when writing messages.
  - b) Not giving any name, address, and phone number, my school's name, address and phone number, or the names, addresses, and phone numbers of others.
  - c) Not wasting time and resources.
  - d) Not using the Internet to buy or sell things.
  - e) Using only my own password when logging onto the Internet.
  - f) Reading only electronic messages that are sent to me.
6. I will not copy words or pictures from the Internet without permission.
  7. I will be responsible for all I do while using technology at school.
  8. I will tell an adult if I see another student breaking the rules.
  9. If I fail to follow these rules I will lose my technology privileges and there may be other consequences.



## **Pacific Heritage Academy**

### **Library Collection Development Policy**

This book selection policy reflects the student/teacher needs for Pacific Heritage Academy which serves approximately 450 students in our K-8 grade school.

I. The purpose of the school library and media center is to provide developmentally appropriate instructional materials and recreational materials so that each student has the potential to develop to the best of his or her ability, mentally exploring the widest possible opportunities. The collection is built to support the evolving culture-based curriculum in interdisciplinary units of study called 'Expeditions' as well as provide a common body of knowledge.

#### II. Selection

A. Book purchase requests may be made by faculty, parents, or students. The final purchase decision will be made by the library media specialist after consulting a variety of selection aids.

B. Criteria for selection will be made considering the following questions:

1. Does the item support the curriculum?
2. Is it age/developmentally appropriate for the patrons?
3. Is the material time-bound? Will it be outdated quickly?
4. Is the material accurate? Is it written or edited by an authority on this subject?
5. Is the scope of the material adequate? Are there views not represented?
6. Is the material visually pleasing and readable? Are the illustrations supportive of the text?
7. Are there user aids such as a bibliography, glossary, or index?
8. Is the current collection already heavy in this area?
9. Will the material be widely used?

#### III. Collection maintenance (weeding)

A. Materials that have been disfigured beyond repair will be discarded.

B. Materials that are outdated or obsolete will be removed from the collection.

C. Materials that are age or developmentally inappropriate will be removed.

#### IV. Controversial material

- A. Any patron or parent may challenge a selection by completing a “Request for Reevaluating Media Materials” form.
  - B. Challenged titles will be reevaluated by a committee composed of parents, teachers, media specialist, and the school director, as well as the Board of Trustees if needed.
  - C. The media specialist will be responsible for researching other titles for the same or similar challenges.
-

## SECTION 22

# TECHNOLOGY PLAN

*"Technology is neither an end in itself nor an add-on,  
it is a tool for improving--and ultimately, transforming--teaching and learning.  
To accomplish that job, technology must be an integral part of [the] school or community's  
overall plan to move all children toward high academic standards."*

State Office of Educational Technology (1994).

1) What is your school's Technology Plan vision statement? Include clear goals and realistic strategies for using telecommunications and information technology to improve education (i.e., student performance, library services, CBT, assessment, etc.)

### **Introduction**

We recognize and value the use of technology in everyday administration of our organization (i.e.-student database, communication with families, lunch program), providing library and media services (cataloging of materials, use of computers for research, writing, communicating), and in criterion-based testing and ongoing student assessment. Additionally, Pacific Heritage Academy aims to integrate technology into the curriculum so that students are being exposed to authentic uses for learning. An example of this is an expedition studying the process of converting sea water into potable water. Such a project would require students to 1) learn and collect data regarding the dependence of water in the Pacific Islands, 2) identify those islands that need the water source most, 3) study the process of distillation, reverse osmosis and

electrolysis, 4) design and perform experiments, and 5) develop procedures for data collection and analysis, 6) present findings to school, community and global audience. Many steps can be managed with paper, pencil, and perseverance — however; all process can be managed and enhanced more effectively with appropriate technologies. This project would require computers, to be used for research and data collection, power-point and computer generated graphs, accessing online journals, web camera and other equipment and software for global conferencing and establishing and maintaining communication with the scientific community and the global audience. This plan is well-supported by the Expeditionary Learning model which ensures meaningful, engaged learning for all students. Our plan is based on the shared vision of educators, parents, community members, and consultants who have technological expertise. Our plan also specifies how the technology will be paid for and how its use will be supported.

### **Technology Vision Statement**

At Pacific Heritage Academy we use technology to promote meaningful learning and collaboration, ensure and provide for needed professional development and support, and respond flexibly to change. We also:

- believe that technology exists to support the curricular goals of the school.
- focus on authentic applications of technology, not technology itself
- plan for technology based on our learning process (example: Expeditionary Learning model)
- have confidence in placing technology in the hands of educators and students

### **Technology Goals**

- Our Technology Plan is based on the school's educational vision and is part of an overall school-improvement plan.
- Our Technology Plan aims to improve student learning, to help students perform authentic tasks, and to help students learn skills that will prepare them for future careers.
- Educators, parents, students, and community members support and prioritize the school's initiatives in the use of technology.
- Professional development and support for staff and all technology users is provided on a regular and ongoing basis both in the use of technologies and in the effective management of technology-rich learning environments.
- The Technology Plan is reviewed and updated annually.

- Evaluation strategies are in place to ensure the Technology Plan generates the desired outcomes.

### **Technology Development Strategy**

We will allow curriculum (learning expeditions) to drive the development or acquisition of school technology and other media resources. Because the thematic units of study for each grade will require access to both written and virtual resources by faculty, students, and support staff, our library media and our technology equipment will be acquired as expeditions are designed and implemented over time. Knowing that each unit will require specific and perhaps specialized technological tools with which to learn and to produce final products, presentations or performances, we will plan a budget that supports the careful and eventual acquisition of both.

As curricular mapping and expedition planning occur over the first few years of operation, these learning units (expeditions) will become the core curriculum of the school. Technology resources therefore will be needed and utilized repeatedly and will also then require reexamination for inevitable updates and improvements as well as new inventions, products and sources. It is part of our vision to see each learning expedition (thematic unit of study) supplied with the resources and tools needed for faculty and students to fully explore, discover, support and convey the topics, themes and outcomes of their inquiry. All technology requests will incorporate discussion of how the technology can be evaluated for their impact on teaching and learning. This will also assist in our efforts to seek and justify technology funding.

### **Technology Funding Strategy**

Effective planning for equipment should be short-term. Technology is changing so quickly that it is impossible to know what advances will be available in five years. Our plan will be reviewed each year during the budget process to make sure the school is purchasing the most current equipment and to take advantage of new and lower cost technology. Technology is an ongoing investment and therefore should be considered a regular expense, not a one-time purchase. We will ensure funding in the budget for technology in the planning year and subsequent years through State and Federal funding, as well as private grants and donations [reference Section 7 & 8, Expenses: 300-Computer Software, 646 – Audiovisual Materials, 670 – Software. Operations & Maintenance: Technology-Related Hardware (Computers, etc.)]. Grants will be sought and can be increased if they are matched by local contributions which we will regularly seek to obtain. We will neither universally accept nor reject technology donations.

Instead, we will critically examine the value of such donations in light of our overall strategy.

2) What is your school's professional development strategy to ensure that staff (e.g., teachers, administrators, and support personnel) knows how to use these new technologies to improve education?

Our professional development strategy extends beyond staff and includes all technology users in our learning community.

### **User Development Strategy**

#### **Teachers:**

1. Teacher prep time will be prioritized. Teachers will have opportunities to research, experiment, and become comfortable and proficient at using technology to create and implement instruction and curriculum.
2. Teachers will use technology to assess student skills and knowledge mastery.
3. Teachers will have access to on-site technical support personnel, who provide troubleshooting and assistance after the technology and learning expeditions are in place.
4. Teachers will use technology to perform standards-based reporting system to monitor and assess student mastery of skill standards, benchmarks and specific content in each subject. This will provide teachers, parents and students with a view of student learning.

#### **All Staff:**

5. Teachers and staff will use technology to communicate with parents, associates, students, public and other experts in their field.
6. A Technology Request procedure will be utilized by the learning community to systematically identify and request new technology that will enable and/or facilitate the learning desired in upcoming expedition studies. (see procedure and form) Each new approved technology investment will be provided hand in hand with the ongoing training needed to use the equipment to its potential. In this way we ensure that all leaders and learners understand the functions and capabilities of each tool and know the proper care required to preserve and maintain equipment to benefit all potential users. We believe this process will maximize our financial investments, provide useful technical skills to all who desire them, and model responsible learning and stewardship.



7. Teachers and administrative staff will participate in a 2 week professional development in August, dedicated in part to using technology in instruction. Additional learning sessions will be scheduled throughout the year as part of early-out Friday's PD (see section 4, calendar and bell schedule), to provide maintenance and basic skills.
8. IT Technician will meet with teachers and administrative staff throughout the year to assess goal progression and offer training and support as needed.
9. The school provides clear guidelines on policies and procedures as well as support in working with technology in the classroom and other technology-rich environments of the school and we have an Acceptable User Policy.

**Administrative Staff:**

10. Staff will use technology to collect and report crucial data to the state education office and the school community and share important information with the school community [students, parents, teachers and staff].
11. Staff will use technology to research and procure grants and donations from state and federal government, companies, private parties, organizations and foundations.

**Students:**

12. Students will become adept in the use of current technologies [computers, software, video and digital still cameras, handheld devices, etc.] in the learning process.
13. Students will not only use technology to learn but will demonstrate responsible and ethical use of technology and realize the impact on and role of technology in society.
14. Students will use computer and internet to perform research, solve problems, study and develop their knowledge and skills.
15. Students are allowed to demonstrate their knowledge and skills through authentic projects and activities as teachers integrate technology into their courses to support performance-based learning.

3) What is your school's evaluation process to enable the school to monitor progress toward the specified goals and make mid-course corrections in response to new developments and opportunities as they arise?

Pacific Heritage Academy annually reviews the Technology Plan to assess and respond

to ongoing feedback and to incorporate new ideas and opportunities. As part of this assessment, the following points of EVALUATION are covered to monitor progress toward goals.

Evaluation of Goal 1: Documents articulating the school's educational vision and the school improvement plan specifically address technology.

Evaluation of Goal 2: Learning expeditions, learning targets, and other learning plans and performance goals outline authentic use of technology and development of skills.

Evaluation of Goal 3: School activities reflect efforts to educate, involve, and solicit support for the school's vision and plan for technology from all stake holders.

Evaluation of Goal 4: Calendars, meeting minutes, and training schedules show evidence of training and support for all users.

Evaluation of Goal 6: The IT Technician is responsible to monitor yearly progress and make recommendations for revision of the technology plan and reports to the executive and administrative levels.

Evaluation of Goal 7: Evaluation plans part of the technology and school improvement plans and are reviewed annually.

### *Technology Plan Highlights*

- The Pacific Heritage Academy Technology Plan is based on values of practicality and economy and a belief that any investment in technology should be with an eye to future and the guarantee of change and improvement. We choose to be conservative and realistic in our planning and purchases.
- Our plan is to use wireless technology as much as possible because of its cost effectiveness. Although the use of desktops would be slightly less expensive they use 150 watts versus our choice of laptops which use 70 watts. Using laptops will save us in utility costs as well as enable us to make an environmentally sensitive choice as we conserve the use of electricity in our building. We also highly value the fact that there is almost no difference in power (speed) when using laptops over desktops. For networking equipment, 8 wireless access points will be used and strategically placed throughout the building, 1 server and 1 switch will be used for the first three years of operations. Additional switches will be purchased if needed.
- The portability of the laptop (and the wireless printers) will support our implementation of 21<sup>st</sup> century learning and teaching methods which strive for active learning and engaged responses by students in the classroom setting.

These models highly encourage students leaving the school building for field work and community service, as well as extended travel learning.

- Based on recommendations of our IT Consultant, CPR Computer Solutions, we will use a Windows platform to prepare learners to function in a real-world work environment. Our consultant estimates that Windows is used by 90% of all computer users, with 9% using Macintosh and 1% using other platforms.

### *Inventory by School Space*

*Classrooms:* Each classroom community will have one desktop computer and 1 phone. Desktop computers are primarily teacher workstations but may also be used by students.

*Community Learning Areas:* Classrooms will be grouped physically in multi-grade communities (i.e.- K-2, 3-5, 6-8) and share a common area for community gatherings and learning times. These areas will each be supplied with 1 multi-function copy machine, 1 60-inch LCD TV (laptops will be used as DVD players), 1 projector, and 1 Ironwood Laptop Storage (LSC)/Technology Cart which will carry 24 Dell laptops and 1 wireless printer on each cart. Dell has been chosen for having an ideal warranty and quality customer service. Each of the 3 mobile carts will serve 6 classrooms with 24 students each. (See picture illustration)



*Ironwood Laptop Storage for 24 laptops*

*Learner Support Office:* Each of our Community Learning Areas include a private office/classroom called a Learner Support Office. These 3 offices contain teaching aids, resources, supplies, and 1 desk-top computer with any assistive/adaptive devices or

special needs equipment. This area serves as a space for students with special needs, as a teacher prep area, and for small learning groups, meetings, and student assessment.

*Our Front Office or School Administrative Area:* Will contain the central phone system, 1 leased Multi-Purpose Machine (copy/scanner/printer), 1 desktop computer for school operations/secretary, and 3 laptops with docking stations for administrative personnel.

**Inventory/Assessment of telecommunication services, hardware, software, and other services.**

	Mobile Lab	Classrooms	Community Learning Center with Learner Support Offices	Admin. Office	Faculty Workstation	Planned Future Acquisitions			
						Planning Year	Year 1	Year 2	Year 3
<b>Laptop Computers</b>									
A. Less than 4 yrs old	<b>24 laptops x 3 carts = 72</b>			<b>3</b>		<b>3</b>	<b>24</b>	<b>24</b>	<b>24</b>
B. Greater than 4 yrs									
<b>Desktop Computers</b>									
A. Less than 4 yrs old		<b>17 (1 in each classroom for faculty workstation)</b>	<b>3</b>	<b>1</b>	<b>(see classrooms column)</b>	<b>9</b>	<b>10</b>	<b>1</b>	<b>1</b>
B. Greater than 4 yrs									
<b># of above</b>	<b>72</b>	<b>17</b>	<b>3</b>	<b>4</b>		<b>12</b>	<b>3</b>	<b>2</b>	<b>2</b>

<b>computers that are Internet capable</b>								<b>4</b>	<b>5</b>	<b>5</b>
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	Mobile Lab	Classrooms	Community Learning Center with Learner Support Offices	Admin. Office	Faculty Workstation	Planned Future Acquisitions				
						Planning Year	Year 1	Year 2	Year 3	
<b>Peripheral Devices</b>										
A. Printers (Wireless)	<b>3</b>						<b>1</b>	<b>1</b>	<b>1</b>	
B. Scanners (Multi-purpose Machine, will be leased)				<b>1</b>			<b>1</b>			
C. Copier (Will be leased)			<b>3</b>	<b>1</b>		<b>1</b>	<b>1</b>	<b>2</b>		

D. Assistive/Adaptive Devices (PACKAGE: VisionBoard2 VB2W Computer Keyboard, Designer Appliances E-Quill-AirO2bic - mouse, Multi-purpose Assistive Listening Deluxe Package ALD-40, SmartNav 3 Assistive Technology Package), Read:OutLoud, Simon S.I.O., Co:Writer Software			1 package					1	
E. TVs capable of receiving digital signal	3							1	2
F. DVD Players (laptops will be used as DVD players)									
G. LCD Projectors			1					1	
H. Laptop Cart (Ironwood Laptop Storage Cart, LSC)	3							1	1 1

	Current	Planned Future Acquisitions		
		Planning Year	Year 1	Year 2

<b>Network Equipment</b>					
A. Hubs: Hubs are obsolete.					
B. Routers: Internet router will be included with the service provider. Wireless routers will not be used. Wireless access points will be used and strategically placed throughout the building.			8		
C. Servers: Dell Precision T1500			1	1 [Dell Power Edge T105 Server 2008 Standard]	
D. Switches: Dell Power Connect, model #5448 48-port Gigabit Ethernet Switch.			1		
<b>Total Classrooms</b>			17		
<b>Number of classrooms wired for internal connections</b>			17		

	Current	Planned Future Acquisitions			
		Planning Year	Year 1	Year 2	Year 3
<b>Telecommunication Links</b>					
A. Gigabit Ethernet: Dell Power Connect 5448, 48-port			1		
B. Multiple T1s or T3					
C. Microwave					
D. Comcast: Comcast Business Plan includes: 50 megabits down, 10 megabits up; 15 mailboxes; internet service; webpage and hosting; email; vpn; firewall; basic cable.			1		
<b>Total School Buildings</b>			1		

	Current	Planned Future Acquisitions
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		<b>Plannin g Year</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
<b>Acquisition Plan Budget</b>		<b>\$15,000. 00</b>	<b>\$35,000. 00</b>	<b>\$15,000. 00</b>	<b>\$15,000. 00</b>

*"Technology is transforming society, and schools do not have a choice as to whether they will incorporate technology but rather how well they use it to enhance learning."  
(North Central Regional Educational Laboratory 1995)*

The tech plan was reviewed by Paul Crawford and Rick Gaisford. The following feedback was given by Rick Gaisford, Educational Technology Specialist:

*I would like to thank you for writing such a good technology plan. It was well thought out, concise and easy to understand. I only wish all the other districts and charter schools had such good plans. With your permission I would like to share the good work that you have done.*

*I don't see the need for any additional changes. This is a very good technology plan. I wish you success as you move forward. Let me know if there is anything I can do to assist you.*

*Rick*

Rick Gaisford  
Educational Technology Specialist  
Utah State Office of Education  
250 East 500 South  
P.O. Box 144200  
Salt Lake City, Utah 84114-4200  
801-538-7798





## Technology Request Form

Please check one: Student \_\_\_ Teacher \_\_\_ Administration \_\_\_

Name(s): \_\_\_\_\_ Date: \_\_\_\_\_

Grade (student): \_\_\_ Subject: \_\_\_\_\_

Check all that applies: Software\_\_\_ Hardware/Peripheral Devices \_\_\_

Web Subscription\_\_\_ Accessories \_\_\_

Title/Name of Software/Hardware/Peripheral Devices/Subscription:

\_\_\_\_\_

Company: \_\_\_\_\_

Platform: PC\_\_\_ Mac\_\_\_ Operating System(s) \_\_\_\_\_

For: Individual Classroom \_\_\_ Network\_\_\_ Learner Support Office\_\_\_ Mobile Cart\_\_\_

Other\_\_\_ Please describe \_\_\_\_\_

Number of Copies\_\_\_\_\_ Funding: Board\_\_\_ PTSO\_\_\_

Please explain how you plan on integrating the requested item(s) into your curriculum (if applicable).  
Use reverse side if needed:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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*For Office Use Only*

Technology Specialist Approval: Yes \_\_\_ No\_\_\_ Explanation:

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Director Approval: Yes \_\_\_ No\_\_\_ Explanation:

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Board Approval: Yes \_\_\_ No\_\_\_ Explanation:

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## SECTION 23

# EXTRA-CURRICULAR ACTIVITIES

Pacific Heritage Academy is a Kindergarten through 8th grade school and as such, will provide no extra-curricular or competitive activities as relates to the Utah High School Activities Association. However, founders of PHA have a wide range of wonderful ideas to enrich, support, and extend classroom learning. Our goal in providing such positive activities is to further develop students to develop a cooperative and unified spirit among each other, strong identity and sound character traits, and to be engaged and contributing citizens of their families and communities in Utah and abroad. These are activities the school will offer in future years, as interest and funding are determined to be available.

PHA's extra-curricular activities will be funded by the school, except as allowed by law and defined in Utah Administrative Code R277-407, which also includes rules on fee waivers. All students will have equal access to the opportunities provided. It is the intent of PHA to begin providing these activities one by one as we are able to do so. It is expected that by the third year of operation some of the activities and programs outlined here will be underway. Essential planning for logistics, finances and staffing has already begun with the organization of committees for several of the ideas proposed here. This needs to continue for each activity or program. The following process with appropriate procedures will help our ideas become realities:



- 1) Committees will be recruited and organized by the Administrative team and will be made up of PHA staff, parents, and community members who are dedicated to and passionate about the activity and possibly have expertise to offer.
- 2) Each committee will be charged with the development of a detailed proposal and action plan for how each program or activity will be accomplished including a list of materials, supplies, staff, researched budget projections and any other requirements for implementation.
- 3) Plans will be proposed to the Board and the Fund Raising Committee for assistance in finding appropriate funding. The work of these committees will allow PHA to seek specific and ideal collaborators, sponsors, grants, donors, and to otherwise raise the needed funds that will enable full success.
- 4) When funding has been secured to enable a program to begin, final approval by the Board of Trustees is obtained.
- 5) Committees will move forward with their implementation plans including notifying students and their families of the opportunity and giving all a chance to participate.

Although providing extra-curricular activities will require additional work and dedication as outlined above we believe strongly and feel committed to these efforts because of how they will extend the influence of the classroom and school and create well-rounded, well-exposed students. The following ideas, although in need of further development, are given here to document and publicly state the intent of the Board of Trustees to these kinds of activities as a high priority of Pacific Heritage Academy.

### **Extra-curricular Programming to be Developed and Implemented**

Pacific Heritage Academy desires to offer a variety of learning activities woven into the standard curricular program. These are seen as educational and beneficial to the development of *Roots and Wings* in our students and their families. These activities will be provided to our community of learners and our target population in the form of unique on and off-site opportunities with community partners in the Salt Lake area as well as partners outside the state and internationally. We have a competitive advantage over other schools in the Salt Lake area by providing these appealing opportunities to our target community. Our wide selection of educational options demonstrate to our students and their family and friends that learning CAN take place any time, any place, using natural and existing resources already available to us. We are a community of Life-long Learners.

These off-campus extra-curricular opportunities assist all students in developing talents and interests, expand vision and experience with new sights, sounds, ideas, and people.

Our business plan and budget (see Sections 7 and 8) clearly demonstrate a high priority we place on providing powerful experiences for our students. Fundraising and Corporate Sponsor support will be earnestly sought to provide strong and ongoing contributions to funding these and other enriching and life-changing activities. All activities will be planned closely with Risk Management to ensure safety of students and staff and to carefully consider plans for unforeseen and unexpected events.

### **Afterschool Programs**

We seek sponsors, collaborators and volunteers as we ask parents and families to get involved in helping to provide 'Roots' through learning cultural dance, music, as well as handicrafts, fine art and tropical horticulture and aquaculture from the Pacific. Equally important are opportunities for students to obtain 'Wings' through exposure to American and World classical art forms such as musical theater, opera, as well as orchestra and piano and other activities of American pastime such as gardening, crafts, and trade skills. Valuable 21st century skills in the areas of technology, entrepreneurship, leadership and citizenship will also be topics and priorities for our learning programs. Our Roots and Wings Programs will include before and after school lessons, excursions to local events and destinations, long distance travel study, guest presenters and performers, concerts, workshops, conferences, and other community events.

### **Sports and Family Fitness**

Our students and their families have an inclination to sports that we support and use to our advantage as we encourage health, fitness and family togetherness.



The school plans for an athletic field and is also fortunate to have easy access to a beautiful city golf course as well as tennis courts, baseball and open fields, as well as the Jordan Park with its generous grassy areas to use as playing fields in our own community back yard!

We will sponsor sports leagues, tournaments, and skill camps as we partner with community organizations and a host of professional athletes from the Pacific Islander community who have a desire to influence and motivate our youth. These partners will assist us in providing instruction and practice in pacific area sports such as cricket and rugby as well as American favorites such as football, volleyball, and basketball. Sports such as golf, tennis and baseball will also be encouraged as our students meet Pacific Islanders who have excelled in these less-practiced sports. We desire to open up many

new avenues of pleasure, skill and social interaction for growing Pacific Islander athletes. We also set the standard for preparing young athletes who are academically prepared and capable of pursuing academic scholarships and avoiding ineligibility issues in high school and college sports because of their strong background in academics from a young age.

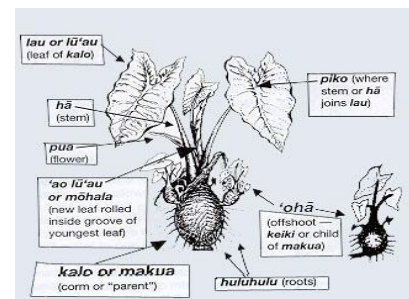
## Camp MANA!

MANA is a powerful weeklong outdoor education school nestled in the quiet village of Hau'ula, 31 miles from Honolulu. Our students find personal growth and strength in many areas as they attend *MANA*, an acronym for the words *Meaning, Achievement, Nature, and Academics* and a Polynesian word that means *Power, Strength, and Spirit*. The



camp is located on the north shore of Oahu in the Hawaiian Islands and includes a 5 acre working tropical farm, a staff and student 'hale' or dormitory, a ropes course and climbing wall, local access to beautiful hiking trails, beaches, and coral reefs with abundant marine life. Just a few miles from the accredited 4-year BYU Hawaii campus and the Polynesian Cultural Center, we have built relationships which will enable our students to be mentored by college students and experience mini-internships at the PCC, a living museum of Polynesian culture.

Integrating multiple disciplines in classroom studies (as Expeditionary Learning does) will enable our students to benefit from continued studies through experiential learning, nature, and adventure. Our own classroom teachers and local counselors create an 'Island Classroom' where they integrate academic subjects into the experiences offered by the unique setting and partnerships at *MANA*. Our professional staff teaches and supervises students 24 hours a day. The experience at Camp MANA is part of the curriculum each year for seventh and eighth graders. We highly value and are committed to making a way for our students to experience island life and feel it is vital to their educational and personal development. This activity is a high priority to us, one that we will make sacrifices to achieve. (See Section 6: Capital Facility Plan where we are considering the most wise and frugal of facility options enabling us to support the priority of Camp MANA and Travel Learning as described below.)



## **Out of State and International Travel Learning**

We are very excited about the development of our travel study program which is tied to and based on our academic program of instruction in the 7th and 8th grade years. We will work closely with Risk Management as we plan for these programs. Our students have opportunities for travel learning that will help develop both Roots (i.e. - Camp MANA on Oahu) and Wings (i.e. - trip to Washington DC to visit historical sites and a home-stay experience with an East coast family.) These trips are extensions of academic study in the classroom where students come face to face with real-world experiences, issues, themes, places, research subjects, and opportunities to implement projects integral to their interdisciplinary exploration. International organizations and contacts in New Zealand and the Pacific countries are anticipating the creation of our school as they desire to help and influence American children who have Pacific Islander ancestry, many of which maintain relations with family across the globe. Student exchange opportunities, home-stay visits, etc. will become worthy projects for our older students and prepare them for high school experiences with a broad view of their world.

## **Adventure & Recreation through Climbing and Canoeing**

Additional exposure to adventurous and recreational activities are offered as we invite students to develop an interest in rock climbing with our indoor climbing trees as well as the traditional skill of canoeing and paddling in the Glendale neighborhood's Jordan River. These efforts will contribute to encourage well-rounded, healthy, physically fit families who enjoy being together and feel connected to activities known to their traditional cultures.

## **Cultural Festivals**

Intertwined with our state core-aligned, culture-themed learning expeditions are a series of cultural celebrations organized by parents, students, and staff. These efforts support learning about the past and present influence of the global community on the history, languages, and cultures of Pacific Rim nations and the world. Celebrations



such as our May Day Festival, Samoan Flag Day, U.S. Independence Day, and New Zealand's Waitangi Day will involve student performances and displays, guests and community experts, as well as memorable activities and contests. The school and wider community will learn about and preserve traditions in food, dance, music, and history through these highly-anticipated events.

## Elk Ridge Day-Ranch

This day-trip education experience gives students regular time away from the city and the school in a laid-back country setting. This 'mini ranch' has a barn and corral with horses and a variety of farm animals as well as fruit trees and a year-round garden that provides hands on experiences for students. The ranch house, pavilion, and meadow serve as a retreat space for students and staff where they extend and reinforce learning from the classroom, are able to play, plan, and prepare. The ranch is a home-away-from-home opportunity that will become familiar to teachers and their students and parents. The ranch is located in Elk Ridge, Utah, 65 miles south of Salt Lake City and is open to Kindergarten through 8th grade classes throughout the year.

## Polynesian Voyaging School

In keeping with the Academy's theme of Voyaging and the special emphasis on Pacific Islander cultures and languages we have partnered with the Hawaiian Civic Clubs of Utah to provide a two day Voyaging School where students learn a variety of seafaring skills and terms, as well as historical and cultural facts related to ancient Polynesian voyaging. Students will have the opportunity to ride and paddle in canoes on Utah lakes and rivers and make a model of a Polynesian voyaging canoe. Teachers and staff will provide 24 hour supervision over the Friday and Saturday Voyaging School. This experience is open to 3rd through 5th graders as well as an advanced experience for 6th through 8th graders.



## Cultural & Fine Arts

We have a number of professionals from the Pacific Islander community who are involved in the world of classical art and music. These include an advisory board member of ours who is a former graduate from the SLCS D and a student at Julliard



School of Music in NYC. This man is a pioneer in the Pacific Islander community in pursuing the study of opera. He is being mentored by the internationally celebrated opera star from New Zealand, Kiri Te Kanawa, a native Maori woman.

Classical pianists and other trained musicians are also to be found within our target community in addition to artists, sculptures, movie makers, and others we have spoken with about our school and it's mission to give 'Wings' to Pacific Islander children. These individuals have expressed a desire to give their time and efforts to provide exposure to





their world of classical music, operas, musical theatre, painting, sculpture, and other fine arts by performing at the school, providing benefit concerts, and holding master classes at our school. We look forward to sponsoring events and hosting guests who will inspire and motivate our students to develop a love for the arts and follow ambitions in these areas if they so desire.



## SECTION 24

# TERMS AND CONDITIONS OF EMPLOYMENT

### TERMS AND CONDITIONS OF EMPLOYMENT

Pacific Heritage Academy is an Equal Opportunity Employer and does not discriminate based on age, disability, race, color, sex, sexual orientation, national origin, or religion per Title VII of the Civil Rights Act, ADEA, and ADA. Pacific Heritage Academy follows all requirements of ADA regarding job application procedures, hiring, advancement and discharge of employees, worker's compensation, job training, and other terms, conditions, and privileges of employment. Pacific Heritage Academy shall provide reasonable accommodations to all disabled employees who can perform the essential job function with or without accommodations.

#### **Employment Processes**

Pacific Heritage Academy makes every attempt to publicize and attract applicants who are qualified and well-suited to perform in our rich learning environment and are passionate about our special mission to serve multicultural students including those with Pacific Islander ancestry. In all cases Pacific Heritage Academy will select its personnel directly and in compliance with all Federal and State rules and regulations. The Board of Trustees is responsible for the hiring, supervision, and evaluation and termination of the school's staff, or the delegation thereof. Pacific Heritage Academy will not discriminate on any terms and conditions of employment.



Included in the Pacific Heritage Academy application of employment will be PHA's At-Will Status and legal compliance stance. Offers of employment are made in writing which, if accepted, are signed and returned to PHA. Accepted offers establish and acknowledge an agreement to an employment relationship between the employee and Pacific Heritage Academy. This agreement outlines the job requirements including the staff evaluation process as well as compensation and benefits. Employment offers may be renewed yearly for all employees including the Director.

### **At-Will Status**

Under Utah State Law, Pacific Heritage is exempt from the Utah Orderly Termination Act. Pacific Heritage Academy employees are at-will employees and have no expectation of continued employment and can be fired without cause and without notice. Likewise, an at-will employee can quit without having to give any notice to Pacific Heritage Academy. Utah courts have three general exceptions to the at-will rule: (1) when the termination violates clear and substantial Utah public policy; (2) when an implied or express contractual term requires dismissal only for cause; or (3) a statute or regulation restricts the employer's right to terminate. In spite of this status, Pacific Heritage Academy desires to dismiss employees only when it is in the best interest of the students at the school.

### **Employee Code of Conduct**

All employees of Pacific Heritage Academy are expected to observe high standards of job performance and professional conduct and professionalism. Specifically, Pacific Heritage Academy considers the following an important, but not exhaustive, list of professional standards:

- Have only appropriate and professional relationships with students.
- Have only appropriate and professional relationships with colleagues.
- Maintain current licenses for any positions held.
- Treat all students fairly.
- Treat others with respect.
- Ensure confidentiality of student information.
- Comply with dress standards.
- Not use, possess or unlawfully distribute illegal or unauthorized drugs.
- Act in accordance with other accepted professional standards.

### **Corrective Action**



Employees are expected to conduct themselves with extreme professionalism. However, should corrective action be needed, the Board shall communicate with the employee and a performance plan shall be established. Certain agreed upon milestones must be met by the employee until performance has improved to the Board's satisfaction.

The following list of reasons for termination or discipline is not all-inclusive. The Board retains the right to terminate employment with or without cause and to determine whether cause for termination or discipline exists, regardless of whether such cause is included in this list.

### **Causes for Disciplinary Action or Termination**

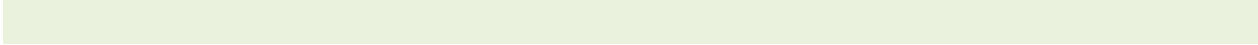
Employment by Pacific Heritage Academy remains at-will. Anyone engaged in a procedure or practice, whether set forth herein or not, is employed at the discretion of the Board of Trustees. Either party may terminate employment at any time, with or without cause, warning or notice.

- Falsification of information supplied to the school, including but not limited to application information, employment data, reports, and testing data;
- Insubordination, which is defined as "Refusal to obey a directive which a supervisor is entitled to give and have obeyed";
- Improper or unlawful physical contact with students;
- Manufacturing, possessing, using, dispensing, distributing, selling, and/or engaging in any transaction or action to facilitate the use, dispersal, or distribution of any illicit (as opposed to authorized) drugs or alcoholic beverages on school district premises or as a part of any school activity;
- Failure to obtain or maintain an appropriate license;
- Theft of school property;
- Inability, incapability, or failure to perform essential job functions despite reasonable accommodations;
- Violation of school policy which is of sufficient gravity to warrant disciplinary action or termination;
- Conviction of a crime which has a rational nexus to education;
- Conduct which is harmful to students and which is of such a negative nature that it warrants disciplinary action or termination;

These terms, including the employee code of conduct, shall be given, in written form, to each employee upon being hired.



Any dispute, claim or controversy concerning employment or the termination of an employee's employment or any dispute, claim or controversy arising out of or relating to any interpretation, construction, performance or breach of the employee contract, shall be settled by arbitration.



## SECTION 25

# EMPLOYEE EVALUATION

### TERMS AND CONDITIONS OF EMPLOYMENT

All employees will be expected to sign an agreement for at-will employment that will establish the relationship between the employee and Pacific Heritage Academy. This agreement will outline the job requirements including the staff evaluation process. It will be renewed yearly for all employees including the School Director. As previously stated, at-will employment means that an employer can fire an at-will employee without cause and without notice. Likewise, an at-will employee can quit without having to give any notice.

Pacific Heritage Academy will select its personnel directly and in compliance with all Federal and State rules and regulations. The Board will be responsible for the hiring, supervision, and evaluation of the school's staff.

Employees are expected to observe high standards of job performance and professional conduct. School employees are expected to conduct themselves in a manner consistent with high standards of personal character and professionalism.

#### **Teacher Evaluation**

Our professional educators are absolutely our most important investment. The whole design of our educational program depends upon the hiring, development, and retention of our human resources. Because of our significant investment in a rigorous training experience for our faculty, we consequently expect a significant return on investment in the form of highly effective teachers. The following are ways and means



of evaluating our professional teachers as we hold them accountable to the trust and investment placed in them.

### *Portfolios that Reflect Professional Development & Contributions*

At the beginning of each year, a preliminary conference between the Teacher and Director will occur at which time the Teacher and Director will outline professional goals for the year. A general outline of that year's expeditions will be presented, discussed, and set. Expeditions will be standards-based investigations of compelling topics and are built by teachers in collaborative teams. Each year all teachers will plan and provide three to four learning expeditions with at least one learning expedition being directly related to a Pacific Islander cultural theme or topic. Teachers will develop and maintain a portfolio containing their expedition designs, including lesson plans, and other project outlines, certificates of training, and other material evidence of professional experience and development. This portfolio provides a model for students and a reference for professional evaluation by the Director and the Board of Trustees.

### *Observation*

At Pacific Heritage Academy, the Director will conduct frequent "observational walk-throughs" on a regular basis and utilize the quick "Observational Check-lists" provided by ELS. In addition, ELS staff will provide model instruction, guided practice for the teachers, and observational feedback on a regular basis. For first and second year teachers, the Director will conduct a minimum of two formal observations (one each semester). The observation protocol includes access to the lesson plans in advance, a pre-observation conference between the Director and teacher, the observation, and then a follow-up debrief and written response. For staff with three or more years teaching at Pacific Heritage Academy, formal observations and feedback will be conducted on an annual basis.

Observational indicators will include Learning Expedition design, integration of content standards, use of active pedagogy and instructional strategies, classroom climate and culture, incorporation of heritage language and culture, knowledge of and passion for teaching the content, formative and summative assessments, and implementation of the core practice benchmarks.

### *Professional Goals, Timelines, Objectives, Rubrics*

At Pacific Heritage Academy professional growth and development for teachers occurs in much the same way it does for students. Goals and objectives, targets and timelines



are set and referred to as efforts are made by the individuals. Teachers use rubrics for self assessment and to push performance and make mid-course corrections. Teachers appreciate the support and structure of this kind of professional development and deepen their understanding and empathy for the learning process of their students. Indeed, the culture of learning at PHA happens at all levels and to all stakeholders.

### *Corrective and Supportive Action*

At Pacific Heritage Academy we love and support our teachers. They are the lifeblood of our learning process! When a teacher demonstrates deficiencies, Pacific Heritage Academy offers support and time to correct and develop through a plan for improvement with specific professional growth goals and timelines. Teachers are encouraged and expected to respond to these efforts.

### *Entry Years Enhancements (EYE)*

Entry Years Enhancements (EYE), is an organized support program for Level 1 educators as they complete the requirements for a Level 1 Utah Educator License. As described in the Utah Professional Teacher Standards (UPTS), all Pacific Heritage Academy teachers will have at least a Level 1 Utah Educator License [or higher], and must complete the EYE requirements applicable to their area(s) of concentration by the end of their Level 1 expiration and have completed three years of experience as required by EYE. Educators who have three years of teaching experience in Utah, and out-of-state educators who are applying for a Utah Educator License and who have three or more years of experience from another state, may be endorsed for a Level 2 Utah Educator License after one year of service with Pacific Heritage Academy, two professional evaluations and a recommendation from the Director and/or Board of Trustees of Pacific Heritage Academy.

Pacific Heritage Academy requires all General Education and Special Education teachers to have the following eight EYE requirements:

1. Hold a Level 1 Utah Educator License.
2. Complete a professional portfolio.
3. Work with a trained mentor for three years.
4. Complete any additional district (charter)/school requirements.
5. Receive a district (charter)/school recommendation for upgrade to Level 2 Utah Educator License.
6. Receive two successful professional evaluations per year for three years in a Utah public or accredited private school.





7. Achieve NCLB/HQ (No Child Left Behind/Highly Qualified) status in at least one licensure area. Pacific Heritage Academy requires all Special Education teachers must be HQ in one area of licensure in order to apply for a Level 2 Utah Educator License.
8. Achieve a score of 160 or better on the *Praxis II: Principles of Learning and Teaching* test at the appropriate level of educational preparation: *Praxis II (0521)*, *Praxis II (0522)*, *Praxis II (0523)*, *Praxis II (0524)*.

Pacific Heritage Academy requires that educators in the Return to License program who have two or more years of service and have not completed EYE, must include the completion of EYE in their Professional Development plan. Those returning who previously held a Level 2 or 3 license shall be issued a Level 1 license during the first year of employment at Pacific Heritage Academy. Upon completion of USOE requirements and a satisfactory charter school evaluation PHA will recommend reinstatement of licensure at a Level 2 or 3. (*Returning Educator Relicensure, R277-502-6*)

Educators with Prior Experience must meet the following six EYE requirements:

1. Hold a Level 1 Utah Educator License.
2. Complete any additional district (charter)/school requirements.
3. Complete one year of service in a Utah public or accredited private school.
4. Receive a district/school recommendation for upgrade to Level 2.
5. Achieve NCLB/HQ (No Child Left Behind/Highly Qualified) status in at least one licensure area. Pacific Heritage Academy requires all Special Education teachers must be HQ in one area of licensure in order to apply for a Level 2 Utah Educator License.
6. Receive two successful professional evaluations in a Utah public or accredited private school.

Additionally, educators coming to Pacific Heritage Academy through the state's Alternative Routes to Licensure program are required to complete the EYE to advance to a Level 2 License.

Alternative Routes to Licensure Programs include: USOE Alternative Routes to Licensure, Applied Technology Education/Alternative Preparation Program (ATE/APP), Foreign Credentialed Educators, Utah Transition to Teaching Alternative Program (UTTAP), Troops to Teachers (TTT), and others. (*Returning Educator Relicensure, R277-502-6, Definitions R277-502-1*)

## SECTION 26

# EMPLOYMENT OF RELATIVES

### EMPLOYMENT OF RELATIVES POLICY

#### Definitions

“Relative” means a father, mother, husband, wife, son, daughter, sister, brother, uncle, aunt, nephew, niece, first cousin, mother-in-law, father-in-law, brother-in-law, sister-in-law, son-in-law or daughter-in-law.

“Appointee” means an employee whose salary, wages, pay, or compensation is paid from school funds.

“School officer” means a person who holds a position that is compensated by school funds; or who holds a position on the Pacific Heritage Academy Board of Trustees.

#### Policy

No school officer may employ, appoint, vote for or recommend the appointment of a relative in or to any position or employment, when the appointee will be directly supervised by a relative, except as follows:

- a. the appointee will be employed for a period of 12 weeks or less;
- b. the appointee is a volunteer.



No school officer may directly supervise an appointee who is a relative, except as follows:

- a. the relative was appointed or employed before the school officer assumed his position, if the relative's appointment did not violate the provisions of this policy in effect at the time of his appointment;
- b. the appointee will be employed for a period of 12 weeks or less;
- c. the appointee is a volunteer.

No appointee may accept or retain employment if he is under the direct supervision of a relative, except as follows:

- a. the relative was appointed or employed before the school officer assumed his position, if the relative's appointment did not violate the provisions of this policy in effect at the time of his appointment;
- b. the appointee is employed for a period of 12 weeks or less;
- c. the appointee is a volunteer.

When a school officer supervises a relative as allowed above, the officer shall make a complete written disclosure of the relationship to the Pacific Heritage Academy Board of Trustees and the school officer who exercises authority over a relative may not evaluate the relative's job performance or recommend salary increases for the relative.

## SECTION 27

# INSURANCE

Pacific Heritage Academy realizes the importance of being properly insured and has taken the steps to be covered through the state's division of Risk Management. These insurance expenses have been allocated in our budget and will continue to be a priority in the future. This school will acquire adequate insurance before the opening of Pacific Heritage Academy and will maintain a certificate of insurance at all times. The following outlines the types and amounts of insurance:

### **Utah State Risk Management A Summary of Coverages and Rates for Charter Schools December 2009**

The following coverages are offered to members of the risk pool, including charter schools, administered by Utah State Risk Management.

Liability Coverage—The amount of coverage varies depending on the situation but is generally sufficient to meet the Utah Governmental Immunity Act damage caps. The current rate for charter schools is \$18 per student with a minimum charge of \$1,000.

Coverages provided are:

General Liability covering bodily injury or property damage caused by an insured;

Automobile Liability covering bodily injury or property damage caused by an insured vehicle;

Personal Injury Liability covering civil rights type offenses;



Errors or Omissions Liability covering wrongful acts, errors or omissions;  
Malpractice Liability covering professional malpractice including that of students engaged in providing services to members of the public in the course of approved health care training programs.

Personal Injury Protection (“PIP”) covering damages arising out of auto accidents on a no fault but limited basis for medical expenses, work loss, funeral expenses and survivor loss.

Vehicle Coverage—Vehicles of an insured, including school buses, are covered for property damage with a deductible of \$500.

Property Coverage—Owned real property and certain personal property is covered on an all risk basis for replacement value, or cash value for certain items such as ATVs or artificial turf fields, including against earthquake and flood. There is a \$1,000 deductible. The rate is dependent upon the declared values in a yearly statement of values. Property coverage is not available for leased buildings. Builder’s Risk insurance is available at an additional cost for new construction if contractually required and the insured discloses the project in advance.

Fidelity Coverage—employee dishonesty is covered by a special crime policy. This covers all employees except the school treasurer who must be separately bonded in amounts established by state law and regulation. There is a \$1,000 deductible.

Loss Control Services—Risk Management also provides a full array of loss control services to minimize liability including a dedicated charter school safety and facility specialist and a human resource specialist, human resource consulting, and building inspections.

Information is provided the Utah State Risk Management. This summary is not intended to reflect all the terms, conditions and exclusions of an actual Policy that will be issued to Pacific Heritage Academy by Utah State Risk Management. This summary is not an insurance policy and does not amend, extend or alter the coverage afforded by any Policy. The actual terms and conditions of an appropriate Policy will be issued and defined at the time coverage is extended for Pacific Heritage Academy, a Utah State Charter School.

**SECTION 28**

**FOR CONVERSION CHARTER  
SCHOOLS**

Section 28 does not apply to Pacific Heritage Academy.

## SECTION 29

# ASSURANCES

### UTAH CHARTER SCHOOLS

**The applicant charter school hereby assures and certifies to the State Superintendent of Public Instruction that:**

- A. The charter school will make provision for such fiscal control and fund accounting procedures as may be necessary to assure proper disbursement and accounting for all funds.
- B. The charter school will maintain a clear, written procedure and process for auditing school finances as per the requirements of the Utah State Office of Education.
- C. The charter school gives the Utah State Office of Education or the U.S. Comptroller General, through any authorized representative, the access to, and the right to examine, all records, papers, or other documents related to all funds, including the submission of reports as may be required.
- D. The charter school will annually maintain written evidence of liability and other appropriate insurance coverages, including a description of the levels of coverage and the relationship of these coverages to local and state agency obligations.
- E. The charter school will make such reports, including reports of evaluations, in such form and containing such information as the State Superintendent of Public Instruction may reasonably require to carry out his legislative functions and to determine the extent

to which funds have been effective in carrying out legislative purposes and project objectives.

F. The charter school will comply with appropriate rules, regulations, and state guidelines except as specifically waived by the Utah State Board of Education or Legislature, and effective control will be maintained over, and accountability provided, for all funds, property, and other assets. The charter school will also adequately safeguard all public property and shall assure that it is used solely for authorized purposes.

G. After settling any outstanding debt, all physical and other assets owned by the charter school become the property of the Utah State Board of Education upon the termination of the charter school.

H. The charter school will comply with the requirements of the Family Educational Rights and Privacy Act of 1974.

I. The charter school will not discriminate in program benefits, participation, employment, or treatment on the basis of race, color, religion or national origin, and will comply with the provisions of Title IX of the Education Amendments of 1972 prohibiting discrimination on the basis of gender.

J. The charter school assures that no otherwise qualified person shall, on the basis of a disability, be excluded from participation in, be denied the benefits of, or otherwise be subjected to discrimination under any program or activity that receives or benefits from local, state, or federal financial assistance.

K. The charter school will not expend program funds for any education program, activity, or service related to sectarian instruction or religious worship.

L. The charter school will function under an open admission policy. If the number of students applying to enroll at any grade level exceeds the capacity of the school or of, classes, or grade levels within the school, then those to be admitted shall be chosen at random from among the applicants, within the allowable mandatory and optional preferences specified in Section 53A-1a-506, Utah Code Annotated.

M. The charter school assures that it will not conduct a program of instruction until such time as:





- (1) The requisite health and safety standards for the school building have been met according to the local fire and health department inspectors;
- (2) Adequate equipment, and materials are available; and
- (3) Conditions are adequate to provide for the economical operation of the school with an adequate learning environment.

N. The charter school will comply with all applicable federal and state laws, rules, and regulations regarding the recruitment, screening, selection, and evaluation of all school employees.

O. The charter school will only employ educators who hold valid Utah Professional Educator Licenses or who meet State Board requirements for alternative licensing routes or Board authorization.

P. The charter school will employ the use of the Utah State Core Curriculum as the foundation for the instructional program for the school.

Q. At the beginning of every school year and prior administering any state assessment, the charter school will review the State Ethics Policy PowerPoint with all teachers who will administer any state assessment during the school year. School test proctors are then responsible to read the *Standard Test Administration and Testing Ethics Policy for Utah Educators* brochure and then sign the *Standard Test Administration and Testing Ethics Policy* document. The signed document must be kept on file at the school.

The charter school will administer the Iowa Test of Basic Skills (IOWA), the Utah State Core Course End-of-Level Tests (Criterion Referenced Test - CRT), the Direct Writing Assessment (DWA), the Utah Basic Skills Competency Test (UBSCT), and the Utah Alternate Language Proficiency Assessment (UALPA), in the grade levels required by U-PASS as a fundamental part of the overall assessment program for the school. Administration of each state assessment will follow all ethical testing procedures including a secure testing site as defined in the *Standard Test Administration and Testing Ethics Policy for Utah Educators*.

The school will administer all required assessments in a secure and standardized manner, and have a process in place to administer criterion-referenced tests (CRTs) via the computer. All test administrations will follow the protocol for submission of school files, ordering and administration of the test in the testing windows for each assessment.



Virtual schools are responsible to secure approved sites where state assessments can be administered and proctored.

R. The charter school assures that resources will be available and a process established to develop a Student Education Plan/Student Education Occupation Plan (SEP/SEOP) for each student.

S. The charter school will operate with a written procedure for student suspension and dismissal, including appeal procedures.

T. The charter school will maintain an active parent/guardian involvement process including some formal mechanism for meaningful involvement in site-based decision making.

U. The charter school will not charge tuition or fees, except those fees allowed by law. Governing Boards will adopt allowable fees annually in an open board meeting.

V. The charter school will operate under the provisions of the Utah Open Meeting Law and adopt bylaws in an open meeting.

W. A copy of the charter will be supplied to interested individuals or groups on request.

X. The charter school will submit an appropriately amended application prior to any material change affecting the purpose, administration, organization, or operation of the school.

Y. A secondary charter school will be accredited or in the process of seeking accreditation.

Z. The charter school will acquire and maintain nonprofit corporate status.

AA. The charter school will follow all state procurement rules.


BB. The charter school will maintain accurate student transcripts.

CC. All governing board members will attend a mandatory human resources training annually.

**The chief administrative officer of the applicant charter school certifies that, to the best of his/her knowledge and belief, the data in this application are true and accurate, and that the applicant will comply with the assurances noted above if this application is approved. Therefore, this application for charter school status and funding is hereby submitted with the full approval and support of the governing body and chief administrative officer of the proposed charter school.**

Name (type): Ofa K. Moeai

Title (type): Chief Administrative Officer

Signature: 

Date: 3-31-2010

### **Admission Procedures**

Admission is not limited based upon ethnicity, national origin, religion, gender, income level, disabling condition, proficiency in the English language or athletic ability. There is no tuition or fees charged for attending Pacific Heritage Academy except those allowed by law.

Pacific Heritage Academy will admit all eligible pupils who submit a timely application. A charter school shall give enrollment preference to children of founding members, pupils returning to the charter school in the second or any subsequent year of its operation and to siblings of pupils already enrolled in the charter school. If, by the application deadline, the number of applications exceeds the capacity of a class, grade level, or building, all applications for that class, grade level or building will be selected for the available slots through a lottery, except that preference as allowed in law shall be given. After the application deadline, pupils for any remaining slots will be accepted in order of their lottery position. If an opening in the school occurs mid-year and no students remain from the original lottery, a notice for applications will be announced and applicants enrolled on the same basis as outlined above.

These admission procedures have been approved in legislation and by the Utah State Board of Education. If you have other administrative details of how you intend to facilitate acceptance of applicants to your school, they should not be in conflict with the language noted above.

### **Proof of Insurance**

Pacific Heritage Academy will acquire and retain a certificate of insurance before the first day of school in its initial year and annually thereafter.

**Electronic Data Submission**

- The Charter School must have an electronic student information system, SIS that can fulfill the following requirements.
  - Produce a complete USOE Clearinghouse file multiple times a year. For details see: <http://www.schools.utah.gov/computerservices/Clearinghouse/Clearinghouse.htm>
  - Submit electronic standardized testing “pre-load” and “all-student” files, for details see: <http://www.schools.utah.gov/computerservices/Testing/Testing.htm>
  - Integrate with the USOE statewide student identification, SSID system. For details see: [http://www.schools.utah.gov/computerservices/SSID/USOE\\_SSID\\_User\\_Manual.pdf](http://www.schools.utah.gov/computerservices/SSID/USOE_SSID_User_Manual.pdf)
  - Integrate with the USOE UTREx system. This system is expected to become operational during the 2010-11 school year and will replace the USOE Clearinghouse. For details see: <http://www.digitalbridgeeducation.com/usoeproject.aspx>
- An electronic fiscal system that can fulfill the following requirements.
  - Provide basic school accounting functions such as budgeting, payroll, accounts payable, account receivable, and personnel management.
  - Produce a USOE specified electronic file for the production of the Annual Financial Report and the Annual Program Report (AFR/APR).
  - Produce a school financial report for publication on the Web for public review. This only applies to schools with budgets that exceed one-million dollars per year.

Pacific Heritage Academy (school name) will have the technology and ability to meet all of the electronic data submission requirements for charter schools

**Nonsectarian Statement**

Pacific Heritage Academy (school name) is nonsectarian in its programs, admission policies, and employment practices and all other operations.

**Special Education/Exceptional Student Services Training**

The principal / director for Pacific Heritage Academy (school name) (or applicant/authorized signer if no principal has been hired) will take a one-day Special Education training class sponsored by the Utah Department of Education subsequent to signing the contract, but prior to the first day of instruction and annually thereafter.

**Assessment**

Pacific Heritage Academy (school name) will name an individual to act as the Assessment Director prior to the first day of instruction, who shall be responsible for ensuring that all U-PASS assessments are administered in a secure and standardized manner, in accordance with information provided during regular Assessment Director meetings and specific assessment trainings.

Ofa K. Moeai  
CAO (please print)

  
CAO's Signature

3-31-2010  
Date

## SECTION 30

# UTAH STATE RETIREMENT

Pacific Heritage Academy will **NOT** participate in the Utah Retirement System, but will provide a flexible, economical, and self-directed retirement plan.

## SECTION 31

# ADDITIONAL INFORMATION

### **Program Summary**

Using a unique program that fuses a cultural studies, a heritage language program, and the proven and cutting-edge 21<sup>st</sup> century learning methods (as used in the Expeditionary Learning model), we have devised a truly unique offering for Utah students. Our program offers students a strong intentional understanding of Pacific Island cultures and languages and a rigorous, engaging curriculum which exceed minimum standards for education. The Academy is proud to be a leader in providing exceptional educational opportunities for Utah families in a safe, academically rigorous, and culturally rich environment of exchange and learning.

Students who attend the Academy develop ROOTS as they deepen their understanding of heritage languages which will preserve and clarify cultural identities within students. Our learners also grow and expand their WINGS as they are exposed to a world of ideas, classes, and experiences designed to teach essential skills, knowledge for the 21st century in America and in our global community.

Pacific Heritage Academy values and instills the concepts of perseverance and strong work ethic, courage and adventure, creativity and ingenuity, honor and respect for authority and law, loyalty to faith and family, and charity and service to others.

Pacific Heritage Academy builds confident and competent learners and leaders prepared for higher education, international entrepreneurship and careers, and service in families and societies of tomorrow.

## APPENDIX A

# HERITAGE LANGUAGE PROGRAM

The mission of Pacific Heritage Academy is to use the power of education, the endurance of language and culture and the virtue of relationships and community to help young people on voyages of discovery. Through thoughtful inquiry, challenging curricula, rigorous requirements and compassionate service students learn who they are and what they can become. We create learning experiences and students find their Roots... and their Wings.

Providing ROOTS through Pacific Heritage Academy's Heritage Language Program to our Pacific Islander students, will allow these students to achieve this mission by working towards competency in their respective heritage language, thus allowing them to pursue their personal goals as well as future professional goals, and in essence giving them WINGS. *Heritage Language Learning [HLL]* is the act of learning a language by someone who has proficiency in or a connection to the culture of that language, such as parents or family heritage and/or have family history relating to that language. English is the predominant language in the K-12 and college education, both public and private. Languages other than English taught at these learning institutions are considered foreign languages and the students are called foreign language learners and are not considered heritage language learners. The majority of Pacific Heritage Academy students will be identified as heritage language learners. These students will have some form of connection to the language through their family and the community they reside in and tend to express some form of proficiency in the language. Pacific Heritage Academy

believes in and has committed to two ideas to help provide ROOTS for its Heritage Language Learners:

1. When a person studies a particular language, the development of vocabulary and language structures inherently require and are tied to basic cultural understandings with meanings and usage steeped in history, legends and myths, belief systems, values, traditions, and politics. We knew that if we wanted our students to understand culture, a language program would not only ensure the teaching of the most valuable cultural knowledge but also efficiently and fittingly do so in our school setting.
2. We discovered and adopted a growing approach to teaching language called *Heritage Language Learning (HLL)*. This approach seems to best fit the goals we have for language learning as well as the learners in our school. The approach recognizes differences between a student studying a 'foreign' language and one who is learning a familiar language that is spoken in his/her home or ethnic community or even already known, to some extent, by the learner. This personal or familial connection to the language requires a different approach to instruction and holds the capacity for a deeper and more meaningful learning experience between language and learner. We desire for our students to have the opportunity to learn the language of their heritage and thereby come to know well and appreciate the culture of their forbearers.

### **Terms, Concepts and Anticipations**

Heritage Language is relatively a new concept first mentioned in the *Standards for Foreign Language Learning* (National Standards in Foreign Language Education Project, 1996). The Polynesian languages are considered heritage languages, an immigrant or endangered indigenous language. Learning a heritage language encompasses learning of traditional customs, activities and values -- culture. Culture, the way and life of the people, cannot exist without a language. We anticipate that a good number of our students are either "passive bilinguals" - meaning, they comprehend the language but are not able to communicate verbally, or are not bilingual in their ancestral language but familiar with the language from family and community exposure.

### **Research Findings**

Our desire to teach heritage languages to our students engaged us in a beginning investigation of the concept of Heritage Language and a search for theories, methods, program models, etc. This inquiry came to a screeching halt as we realized that the development of an effective program of instruction will require much more time than we presently have and would need many more minds to the project. Consequently, this



short narrative is to introduce the idea as an essential component of our comprehensive program of instruction but one that will be progressive and rolled out over time. (See Multi-year Roll-out Plan attached) We realize that we must grow our knowledge and abilities to have a successful program, that we can build it slowly over time, and that a successful program will always have a foundation of research and planning. We therefore propose that the Heritage Language Program of Pacific Heritage Academy will be unique and vitally crucial in serving three intents or purposes: Understanding and Communication; Revitalization and Maintenance; Providing Roots and Wings to our students.

### **Purpose One: Understanding and Communication**

The first purpose in developing a heritage language program is that it allows students to understand their culture and to communicate with other generations. This communication can create stronger connections between the student, their families and community. Research by the Utah Board of Juvenile Justice (2007) shows a higher percentage of family conflicts and other family related issues and does NOT support the assumption that gang involvement and drugs are keeping them from success and academic achievement. Specifically vulnerable are students in the 6<sup>th</sup> grade. The heritage language program aims to help establish better family relationships by increasing and maintaining parent communication and participation in the school and its cultural and language program. It will allow both parent and child to share in a common purpose as they work towards reestablishing their ancestral language as a living language. Barbara Yee et al, mentioned that the “loss of one’s heritage language is an important issue for immigrant and minority families. If parents and children do not share a common language in which both are fluent, family communication problems can arise and possibly threaten the quality of parent-child relationships (Fillmore, 1991). Through a language program students can improve bicultural and bilingual skills and develop a positive ethnic identity. (*University of Hawai’i [UH Family]; Asian American and Pacific Islander Families: Resiliency and Life-span Socialization in a Cultural Context* by Barbara Yee, Barbara Debaryshe, Sylvia Yuen, Su Yeong Kim, Hamilton I. McCubin)

### **Purpose Two: Revitalization and Maintenance**

Another purpose of Pacific Heritage Academy’s Heritage Language Program is to encourage and promote revitalization and maintenance of the language. This is accomplished through effective pedagogical approaches by highly-qualified instructors and parents. Our program development goals include providing an excellent program filled with enriching academic and culture-based activities. A common misconception is that students who enroll in a heritage language fall behind in general academics and/or



English skills. This is false, as studies show those enrolled in a heritage learning program “consistently perform as well or better than their English-only counterparts... students in other multi-language educational programs around the world have similar performance statistics.” (*Aha Punana Leo*)

Having a second language is an advantage our students at Pacific Heritage Academy will have versus the 82% of Americans across the nation, who can only speak English (U.S. Census, 2003). According to the U.S. Department of Education, “bilingual fluency is even higher for AAPI [Asian American Pacific Islander] school age children, at 95% (U.S. DOE, National Center for Education Statistics, 2005). “Thus, many AAPI individuals benefit from the cognitive and social advantages of being bilingual or multilingual. These advantages include enhanced meta-linguistic awareness, or knowledge of the properties of languages; divergent thinking and problem-solving abilities; intercultural awareness and interaction skills; and more employment opportunities.” (*Nancy Cloud et al, 2000*)

### **Purpose Three: Providing Roots and Wings**

*“There are but two lasting bequests we can give our children. One is roots, the other, wings.”*  
(Anonymous quote, part of Pacific Heritage Academy’s mission statement)

The third purpose of Pacific Heritage Academy’s heritage language program is to give each student experiences that help them develop *Roots and Wings*. Pacific Heritage Academy students develop *roots* as they are given the language foundation to develop and nurture their inherent curiosity to know their ancestral culture and traditions. Students in our comprehensive program also grow academically as they are exposed to many topics, skills, ideas, and places they would not otherwise learn about. Our students develop *wings* and become individuals who are productive, responsible, tolerant, and caring in a global world. They are empowered to apply their academic interests to their community, and see the benefits and blessings of being both American and having a Pacific Islander heritage.

### **Basic Program Development Vision**

We anticipate our program will have elements common to foreign language programs, for example, direct instruction in classroom settings, use of materials, texts, primers, and other exercises and drills to learn phonetics and phonology as well as syntactic structures. Assessment will likely include oral and written assessment as well as authentic assessment of journals and portfolios as well as presentation and performance using language skills obtained over time in the program. We anticipate ~~and~~ large enrollment of Tongan students, followed by Samoan, and then smaller numbers of Hawaiian, Maori, and perhaps some Fijian students. Tahitian and other island groups will likely not



require curriculum development. Program development will include attempting to create a broad program of general Pacific language concepts. Language-specific curriculum will be determined by a significant enrollment and ensure that all students will have an opportunity to learn a heritage language. Our program policy will allow all students to choose a language to learn and will participate in language learning activities on a weekly basis. Our program methods will likely involve placing speakers of target languages (Language Mentors) in the classroom and throughout the school on a daily basis as well as direct instruction. Language Mentors can be teachers, administrators, staff, teacher aids, parents, or guests who will use target languages with the children. The environment at Pacific Heritage Academy will purposefully involve and invite the use of Pacific languages by anyone, especially in academic discussions. This heritage language approach will enrich our learning environment, inspire a love for language as the basis for cultures and people everywhere, as well as strengthen communications and bonds between the immigrant generations, and demonstrate to learners the wide applicability of heritage languages in the context of academia and in social transactions beyond the home and family.

### **Program Development Guides**

Pacific Heritage Academy will suggest the Leadership Team (Heritage Language Development Committee) consider and implement the following 'Guiding Principles for Dual Language Education' as a guide in developing an educational program and foundations for developing and teaching a Pacific Heritage Language Program.

### **Guiding Principles for Dual Language Education**

*Elizabeth R. Howard, Julie Sugarman, Donna Christian, Kathryn J. Lindholm-Leary, & David Rogers*

2007, Second Edition

Supported by the National Clearinghouse for English Language Acquisition at the George Washington University

The *Guiding Principles for Dual Language Education* is a tool to help dual language programs (two-way immersion, heritage language, foreign language immersion, or developmental bilingual programs) with planning and ongoing implementation.

Based on the New Mexico *Dual Language Program Standards* and grounded in research on effective schools, the publication was developed by the Center for Applied Linguistics in

2005 with an expert panel of researchers and practitioners from across the United States, and revised in 2007.

<b><i>Assessment and Accountability</i></b>	
Principle 1	The program creates and maintains an infrastructure that supports an accountability process.
Principle 2	Student assessment is aligned with state content and language standards, as well as with program goals, and is used for evaluation of the program and instruction.
Principle 3	The program collects a variety of data, using multiple measures that are used for program accountability and evaluation.
Principle 4	Data are analyzed and interpreted in methodologically appropriate ways for program accountability and improvement.
Principle 5	Student progress toward program goals and NCLB achievement objectives is systematically measured and reported.
Principle 6	The program communicates with appropriate stakeholders about program outcomes.

<b><i>Curriculum</i></b>	
Principle 1	The curriculum is standards-based and promotes the development of bilingual, biliterate, and multicultural competencies for all students.
Principle 2	The program has a process for developing and revising a high quality curriculum.
Principle 3	The curriculum is fully articulated for all students.

<b><i>Instruction</i></b>	
Principle 1	Instructional methods are derived from research-based principles of dual language education and from research on the development of bilingualism and biliteracy in children.
Principle 2	Instructional strategies enhance the development of bilingualism, biliteracy, and academic achievement.
Principle 3	Instruction is student-centered.
Principle 4	Teachers create a multilingual and multicultural learning environment.

<b><i>Staff Quality and Professional Development</i></b>	
Principle 1	The program recruits and retains high quality dual language staff.
Principle 2	The program has a quality professional development plan.

Principle 3	The program provides adequate resource support for professional development.
Principle 4	The program collaborates with other groups and institutions to ensure staff quality.

	<b><i>Program Structure</i></b>
Principle 1	All aspects of the program work together to achieve the goals of additive bilingualism, biliteracy and cross-cultural competence while meeting grade-level academic expectations.
Principle 2	The program ensures equity for all groups.
Principle 3	The program has strong, effective, and knowledgeable leadership.
Principle 4	The program has used a well-defined, inclusive, and defensible process to select and refine a model design.
Principle 5	An effective process exists for continual program planning, implementation, and evaluation.

	<b><i>Family and Community</i></b>
Principle 1	The program has a responsive infrastructure for positive, active, and ongoing relations with students' families and the community.
Principle 2	The program has parent education and support services that are reflective of the bilingual and multicultural goals of the program.
Principle 3	The program views and involves parents and community members as strategic partners.

	<b><i>Support and Resources</i></b>
Principle 1	The program is supported by all program and school staff.
Principle 2	The program is supported by families and the community.
Principle 3	The program is adequately funded.
Principle 4	The program advocates for support.
Principle 5	Resources are distributed equitably within the program, school, and district.

Center for Applied Linguistics • 4646 40th St. NW • Washington, DC 20016  
[www.cal.org/twi/guidingprinciples.htm](http://www.cal.org/twi/guidingprinciples.htm)



## **Program Development Resources**

Pacific Heritage Academy will use the following, but not limited to, resources for the development of its Heritage Language Program:

- National Heritage Language Resource Center at University of California Los Angeles.
- College of Languages, Linguistics and Literature at University of Hawai'i.

### **Pacific Heritage Language and Culture Content Implementation Policy**

To assure the effective implementation of our heritage cultural learning objectives for students at Pacific Heritage Academy, the Board of Trustees requires that

- 1) All teachers provide a minimum of one (1) expedition annually on an issue or topic directly related to the Pacific Islands or its people.
- 2) All students participate in language instruction as outlined on a weekly basis.

A set of core knowledge standards will be developed for what we would like to see students learn in the areas of heritage language and culture.



## **Pacific Heritage Academy Heritage Language Initiative**

To demonstrate the commitment of the Board of Trustees to the development of a Heritage Language Program for students attending Pacific Heritage Academy, we will formally extend the following "Heritage Language Initiative".

We the governing Board of Trustees of Pacific Heritage Schools do strongly assert, as an essential component of our mission, the full implementation of a Heritage Language Program by 2017 to teach languages of the South Pacific. The goal of this Initiative is for the gradual roll out or development of a program whereby every Pacific Heritage Academy student will graduate from the school having achieved at least a "Foundational Level" of their chosen Heritage Language Competencies or the appropriate assessment. Graduates will have a basic foundational ability in a Heritage language and a better understanding of the native perspective, culture and history as well as an increased sense of responsibility toward their communities. The competencies to be defined serve as a tool which will, when applied with effort and desire, support each student to discover again and again what it is to be a Pacific Islander. Our challenge is to create authentic native contexts and culturally appropriate assessment tools through which students find meaningful connections. The use of the heritage language with/to the students outside the school is critical. Most parents don't see the merit of using the language with their children due to parents' lack of understanding and education. Changing mentality/perspective takes time and changing habits and perspective is doubly so.

### **Pacific Heritage Language Program 2011-2017 Multi-year Rollout Plan**

#### **Preliminary Study and Organization**

A Heritage Language Development Committee will be established as a school curriculum committee and leadership team for this project and will include parents and community members who have interests, competencies, and/or expertise in the heritage languages of the Pacific Islands. Our survey and research plans will be designed in the planning year (2011-2012) and include the help of local University language departments as well as national organizations who offer networking, support and research in the area of program development for heritage languages. We anticipate drawing significant attention to our efforts due to the innovation and need for such a program both locally



and nationally. The subject of heritage language learning is a new and emerging field that seeks both opportunity and participants for study. During the fall of 2012, concurrent with the first year of enrollment at Pacific Heritage Academy, a Student, Family and Community Heritage Language Survey will be conducted to assess heritage language usage by students and families in their homes, as well as resources for and community use of the target heritage languages.

## **Pacific Heritage Language Program: Multi-year Action Plan Proposal**

Pacific Heritage Academy faculty, students, staff and administrators will have an active role in developing the target language competencies we desire in our students. Research, program development, and discussion for full implementation will include teachers and staff as well as leadership. Heritage Language Committee will recommend a comprehensive program of instruction by the 5<sup>th</sup> year. Program goals will include a year by year implementation plan for components of the eventual program over a multi-year course of action. What is not known at the time of this writing are the skills and competencies our students will have at the time they enroll in the school. The progressive design and eventual program of instruction will depend largely on this unknown element.

### **1. Goal**

Pacific Heritage Academy's goal is to have a fully functioning language competencies implementation by 2017-18. To this end, the program to be designed using best-practices in the language teaching profession as well as the emerging field of heritage language development for the specific language competencies shown in the research survey. The program will be implemented by teachers in the year 2017-18 with focused effort on creating culturally authentic classroom activities and assessment. The program design, to include methods, materials, and resources, will address the various competencies and skills found in our students as well as the needs within the homes and families of our learning and cultural community.

### **2. Process**

The leadership group will work with school administration to develop an inclusive process, being particularly sensitive to the divergent views teachers and staff hold of the Heritage Language Initiative. Research will be shared and discussed to find the most applicable guidance for our program and population needs.

### **3. Multi-year goals**



The leadership group will develop flexible multi-year goals (2011-2017) including thorough research in the areas of theory, methodology, assessment, family and community support, teacher qualifications, establishing baseline understandings, developing competencies, culturally authentic activities, and staff development. Authoritative resources and organizations will be used to develop goals and program structures.

#### **4. Assessment**

- a) The leadership group will develop student self-assessment plan focusing on the personal meaningfulness (i.e. portfolio format) to evaluate competencies acquired through curriculum-related, extra-curricular, community-based and self-initiated activities. This effort needs to be campus-wide to streamline the process K-8.
- b) The leadership group will develop a cumulative record-keeping tool to determine level of competency acquired and also to acknowledge student achievement (i.e.- a certificate program). A natural starting point will be through curriculum mapping.

#### **5. Staff Development**

- a) Curriculum-wide staff development: Staff development will need to align with curriculum development (e.g. alignment among teachers by grade level, in shared teaching, etc.) As a formal part of teacher staff development plan, an annual review will be incorporated. The role of the administrative leader and the leadership team is pivotal.
- b) School-wide staff development: teachers and staff will take the initiative to participate in staff development activities sponsored by the leadership group to experience authentic Pacific Islander cultures and Heritage. Language instruction and environmental learning in the school will be utilized to reach our goals. Teachers and staff will make use of resources provided by the school to develop authentic language-learning activities and assessment.
- c) Individual and Small-group Staff Development: There has been much discussion on how to provide staff development without breaking the budget. Self-initiated staff development is growing in popularity and can be used for our purposes in the following ways:

##### **1) Teachers seeking colleagues to provide the needed support**

- a) Staff members who are willing to share their expertise more formally and more substantially may qualify those hours as partial/full replacement time for homeroom/supervisory duties
- b) Teachers might welcome a colleague into their classrooms for a year-long commitment

## **2) Teachers seeking support from community experts**

### **3) Teachers seeking individual enrichment** by taking university courses, etc. on their own

- a) Professional advancement credits will be given as an
- b) Partial tuition reimbursement may be available

**4) Teachers seeking support from advanced heritage language students**, particularly for language support advanced heritage language students can identify school service projects related to language learning that they can use to assist faculty and to satisfy personal requirements [e.g.] 1) a musically talented student could lead an 'ukulele group and teach the basic songs that are considered "classics" of a target heritage language. 2) a dancer could teach dance and 3) those with language skills could focus on leading a small faculty group and also do peer tutoring, an especially worthwhile opportunity.

### **5) Teachers providing staff development opportunities** for faculty as well as teachers providing opportunities for students to acquire competencies:

- a) Already occurring staff development opportunities utilize existing resources such as: Kalei A'arona-Lorenzo's Hawaiian Language courses, the Samoan Word Book and CD, Hawaiian early readers, a 'ukulele class
- b) Possible student opportunities to acquire competencies are listed above in #4
- c) Resources: The preliminary needs assessment on resources is part of the initial survey and important to all stake holders. Resources will be needed throughout the roll out years prior to a fully implemented program.

## **6) Impacts**

The real effects of implementing and Heritage Language Program are unknown until we begin the actual teaching process with the faculty and the staff. We also cannot predict certain program design choices because we don't know the outcomes of the survey or the results of research on theories and methods, etc. and the understanding we will gain about how to best assist students in developing heritage language competencies.

However, it is safe to say that the following areas will be impacted:

- a) Program (defined systems, methods, and resources for us in the school, increase in language use by students as program methods are employed, involvement of

parents and community members eager to participate and support the project of language learning.)

- b) Master Schedule and Bell Schedules (shorter Wednesdays to create staff development/student competencies acquisition needs, etc)
- c) Advisory programs and
- d) School Calendar with language learning activities and events
- e) Core Knowledge Standards
- f) Staff Development
- g) Resources: technology, supervision, community resources
- h) Facility usage
- i) Public Relations [management of student, parent, community perceptions, questions, concerns...]

### **7) Committee Recommendations**

Leadership Team will be well informed to create a comprehensive program of Heritage Language Instruction and recommend it to the Pacific Heritage Academy Board of Trustees for full implementation by Fall 2017.

### **8) Collaboration between Leadership Team and Administrator**

- a. The Heritage Language Program Leadership Team will meet with the administrator to review the Pacific Heritage Academy Multi-Year Rollout Plan, develop goals for program development, implementation, and proceed with implementation plan.
- b. The Leadership Team, under the guidance of the Administrator, will identify resources and staff development needs so that faculty can develop the culturally appropriate and authentic classroom activities and assessment.
- c. Administrator and Leadership Team will assume responsibility for assessing formal teacher staff development needs as they relate to the language teaching competencies.
- d. Faculty members will initiate a voluntary internal support for Staff Development needs.
- e. Leadership Team to identify a network of heritage language evaluators
- g. The Leadership Team, faculty and staff will seek cultural organization support to identify and utilize community resources
- h. Leadership Team will work with the administration to create faculty incentive programs, e.g. professional development credits

### **9) Program Adjustment**

Pacific Heritage Academy Administration will conduct a systemic examination of the heritage language program, standards, operational effects, advisory program and



support structures and appropriate assessment of these and other areas to ensure a comprehensive approach to improvement.



1060 South 900 West • Salt Lake City, UT 84104 • University Neighborhood Partners - [www.partners.utah.edu](http://www.partners.utah.edu) - Office-801-972-3596 • Fax-801-972-3628

Utah State Charter School Board  
250 E. 500 S. SLC, Ut 84114

Dear Members of the Board:

I am writing to you to support the public charter school application for Pacific Heritage Academy. The goals of the Academy are well matched to University Neighborhood Partners' (UNP) mission to develop reciprocal relationships between institutions of higher education and west side youth, families, and community partners. Located in Glendale, UNP currently supports 25 partnerships in 21 west side locations, 15 of these partnerships are located in K-12 public and charter school locations. UNP bridges the University of Utah with ethnically and culturally rich Salt Lake City neighborhoods. Campus-community partnerships are focused on increasing opportunities for access to higher education; building the capacity of neighborhoods in the areas of health, housing, employment; creating initiatives that expand community leadership; and overcoming barriers of race, ethnicity, religion, socio-economic status and geography.

While these issues are complex, one of the critical areas that continues to surface in every partnership is the need for providing more space that embraces, teaches, and preserves the rich cultural diversity and heritage of the many communities that make up Salt Lake. All too often in the past, we have made the repeated mistake of insisting that successful acculturation required diverse communities to minimize their cultural heritage. We continue to live with the many levels of damage and pain that this oppression has caused. The Pacific Heritage Academy is an opportunity to rebuild and teach the strong cultural heritage and the traditions of the Pacific Islander communities to youth, families, allies, and the community at large.

The unique teaching method at the Pacific Heritage Academy will use a project-based, hands-on, experiential learning style to teach the required curriculum, as well as, Polynesian languages and culture. With a strong emphasis on parent involvement, community leaders, parents, and extended family members are active participants in the educational process. We anticipate the Academy will not only provide strong support to the multiple Pacific Islander communities, but because if it focus on cultural preservation, it will also grow to be a valued cultural heritage site for the city and the state.

The Pacific Heritage Academy provides the much needed space where diverse voice and identity can grow strong and are valued, and where parents return to their primary role of teacher. We are excited about this growing educational partnership and offer our full support. We will continue to work with the Academy to develop university-school-community partnerships support *unity in diversity*.

Sincerely,

Rosemarie Hunter, PhD  
Special Assistant to the President for Campus-Community Partnership  
Director, University Neighborhood Partners





State of Utah

GARY R. HERBERT  
*Governor*

GREG BELL  
*Lieutenant Governor*

**Department of Community and Culture**

Palmer DePaulis  
*Executive Director*

**State Office of Ethnic Affairs**

Jesse M. Soriano  
*Director*

March 30, 2010

Dear State Charter School Board,

I am writing to acknowledge the hard work of the founding committee of Pacific Heritage Academy and to offer my support of their proposal for a new charter school for Salt Lake City. The Pacific Islander community is a significant citizen group that contributes to the vibrant culture of Utah but is also at-risk. They are comprised of large families who are concerned about the education of their children, some of whom feel uncomfortable to approach and partner with the school system. The vision for this school will give these parents a community to belong to, a place to learn and to be intimately involved and supportive of their children's education.

I assure you, the community of Glendale and Pacific Islanders across the state, will joyfully welcome the news of an educational institution dedicated to cutting-edge learning methods to help their children enjoy learning. I anticipate an overwhelming level of support for this school by the community. Of special significance to Pacific Islanders will be the opportunity to have their children and grandchildren, most of whom were born in the USA, learn their native languages and the culture of the islands. What a valuable service this school will give to Utah's Polynesians!

Sincerely,

Fotu Katoa  
Director of Pacific Islander Affairs



Van Turner  
Council Member-District Two

**SALT LAKE CITY CORPORATION**  
OFFICE OF THE CITY COUNCIL

March 31, 2010

Mr. Brian Allen, Chair  
State Charter School Board  
Utah State Office of Education  
250 East 500 South  
P.O. Box 144200  
Salt Lake City, Utah 84114-4200

Dear Mr. Allen,

I am pleased to express my support for the Pacific Heritage Academy, a proposed charter school. I have met with Richard Kafusi and his group with regards to their plans for the Academy. We discussed the history of the Glendale community, including the City's long-term plans for this area. I feel that the Academy would contribute greatly to Salt Lake City as well as to the Glendale neighborhoods.

I understand that the focus of the Academy is to assist and educate members of the Pacific Islander community. The Academy anticipates 450 students including kindergarten through eighth grade. This school will be an asset to our community, and I recommend that the Board approve this proposal. I would be happy to discuss this with you in further detail; my phone number is (801) 535-7656.

Best wishes,

Van Turner  
Salt Lake City Council Member  
District Two

VT/sr

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