

CHARTER SCHOOL PERFORMANCE CERTIFICATE

This Performance Certificate ("Certificate") is executed on December 14, 2023, by and between the Idaho Public Charter School Commission (the "Authorizer") and American Classical Schools of Idaho, Inc. (the "Charter Holder") for the purpose of operating North Idaho Classical Academy LLC (the "School"), an independent public school organized as an Idaho nonprofit corporation and established under the Public Charter Schools Act of 1998, Idaho Code section 33-5201 *et seq.*, as amended (the "Charter Schools Act"). The parties of this Certificate may jointly be referred to as "Parties."

RECITALS

WHEREAS, American Classical Schools of Idaho, Inc. is a non-profit entity incorporated with a board of directors; and

WHEREAS, on December 14, 2023, the Authorizer approved a petition of the School's charter for a five-year term of operations to begin July 1, 2025 and end on June 30, 2030;

NOW THEREFORE in consideration of the foregoing recitals and the mutual understandings contained herein, the Authorizer and the Charter Holder agree as follows:

SECTION 1: TERMS OF AUTHORIZATION

- A. **Establishment of School.** The Charter Holder is hereby authorized to implement at the School the program described in the Charter, attached to this Certificate as Appendix C and incorporated herein by this reference. Any significant changes to any section of the Charter, including the educational program, facilities plan, financial plan, or the management plan, during the School's pre-operational period or first operational term shall be treated as an amendment to this Certificate and potentially the Charter in accordance with the Authorizer's policy.
- B. **Term of Certificate.** The School's operational term under this Certificate shall be from July 1, 2025 to June 30, 2030. Subsequent certificates may be issued by the Authorizer in accordance with Idaho Code and Authorizer policy.
- C. **Renewal Conditions.** The School is conditionally approved to operate. Applicable conditions are attached as Appendix B and incorporated by reference. If all renewal conditions have been completed by the School to the satisfaction of the Authorizer by the stated due date within the conditions in Appendix B, the School is authorized to continue operations through the remainder of the current Certificate term. In the event that renewal conditions have not been completed to the satisfaction of the Authorizer by the stated due date within the conditions in Appendix B, the Authorizer may revoke the School's Charter at its next regularly scheduled meeting.

SECTION 2: EDUCATIONAL PROGRAM

- A. **School Mission.** The mission of the School is as follows:

The mission of North Idaho Classical Academy is to train the minds and

- improve the hearts of students through a classical, content-rich curriculum that emphasizes virtuous living, traditional learning, and civic responsibility.
- B. Grades Served.** The School may serve students in grades Kindergarten through 12.
- C. Design Elements.** The School shall implement and maintain the following essential design elements of its educational program:
- i. Teach reading and correct spelling through an explicit phonics program that gives children a systematic understanding of English orthography. This shall be verified by classroom observation, curriculum and/or teacher discussions.
 - ii. Require memorization of math facts, practice mental math, and explore the larger concepts behind mathematical operations. This shall be verified by classroom observation and/or teacher discussions.
 - iii. Impart a mastery of language through teaching formal grammar, word origins in order to build vocabulary, and Latin. This shall be verified by classroom observation, curriculum and/or teacher discussions.
 - iv. Cultivate citizenship and historical knowledge through an intensive study of our American heritage, often using primary sources. 8th grade is a major transition point where students take the full sequence of questions on the U.S. citizenship test. This shall be verified by reviewing test results of 8th grade citizenship test.
 - v. Build character in young people through explicit training in the moral virtues combined with the study and emulation of good character found in history and literature. This shall be verified by feedback obtained from parents via survey, classroom observation, and/or teacher discussions.
- D. Standardized Testing.** Students of the School shall be tested with the same standardized tests as other Idaho public school students.
- E. Accreditation.** The School shall be accredited as provided by rule of the State Board of Education. The School shall be accredited or appropriately credentialed by Cognia. All reports issued to the School from the accrediting agency shall be submitted to the Authorizer within five days of receipt.

SECTION 3: SCHOOL GOVERNANCE

- A. Governing Board.** The School shall be governed by a non-profit board of directors (the “Board”) incorporated by the Charter Holder. The Board shall serve as public agents authorized by the Authorizer, in a manner that is consistent with the terms of this Certificate, so long as the Board operates in accordance with state and federal laws, rules and regulations. The Board shall have final authority with respect to the School’s operation, and shall have the responsibility of overseeing academic achievement, financial stability, and operational management of the School. The Charter Holder shall also be responsible for maintaining and enforcing Board compliance and providing stewardship over the Board.
- B. Articles of Incorporation and Bylaws.** The articles of incorporation and bylaws of the Charter Holder shall provide for governance of the operation of the School as a nonprofit corporation and a public charter school, and shall at all times be consistent with all applicable laws, rules, regulations, and this Certificate. The Charter Holder shall notify the Authorizer of any

modification to the articles of incorporation or bylaws within five business days of the modification's approval by the Charter Holder.

- C. **Charter Board Composition.** The composition of the Board shall at all times be determined by and consistent with the articles of incorporation and bylaws, and all applicable laws, rules, regulations, and policies. The Charter Holder shall notify the Authorizer of any changes to the Board composition and provide an amended School Leadership Roster within five business days of the change taking effect.

SECTION 4: AUTHORIZER ROLE AND RESPONSIBILITIES

- A. **Oversight Allowing Autonomy.** The Authorizer's role shall be to evaluate the School's performance outcomes according to this Certificate and the Performance Framework, and shall be to provide compliance oversight. The Authorizer shall comply with the provisions of the Charter Schools Act and the terms of this Certificate in a manner that does not unduly inhibit the autonomy of the School.
- B. **Charter School Performance Framework.** The Charter School Performance Framework ("Performance Framework") is attached and incorporated into this Certificate as Appendix A. The Performance Framework shall be used to annually evaluate the School's academic achievement, Board stewardship, operational management, and financial stability. The specific terms of the Performance Framework are determined by the Authorizer and shall be binding on the School.
- C. **Separate Academic Evaluations.** The academic performance outcomes of the K-12 on-site programs operated by the School shall be aggregated across all grades for purposes of reporting.
- D. **Identified Comparison Group.** For purposes of evaluating the School against the metrics and measures established in the Performance Framework, the School's comparison group shall be identified as described below and the School's comparison group shall be established for the length of the Certificate term.
- i. The comparison group for the School's K-12 on-site program shall be Boundary County School District 101
- E. **Authorizer to Monitor School Performance.** The Authorizer shall monitor, review, and report on the School's progress in relation to the indicators, measures, metrics, and targets set out in the Performance Framework. A formal report of the School's academic, financial, and operational performance ("Performance Report") shall be provided to the school and the public by the Authorizer annually. Data necessary to conduct this evaluation will be collected throughout the year. Additional monitoring and reviewing of information may be necessary if compliance concerns arise.
- F. **School Performance.** The School shall meet "standard" on all measures of the Performance Framework. The Authorizer shall renew any charter in which the School meets "standard" or above on all the terms of its Certificate, including all Certificate appendices, at the time of renewal.
- G. **Performance Framework as Basis for Renewal of Charter.** The School's performance in relation to the Performance Framework shall provide the basis upon which the Authorizer shall decide whether to renew the School's Charter at the end of the Certificate term.

- H. Required Reports.** The School shall prepare and submit reports in accordance with the Authorizer's policy.
- I. Authorizer's Right to Review.** The Authorizer maintains the right to request and review additional documentation if such becomes necessary in the course of regular oversight duties or to investigate the validity of a compliance concern. The Authorizer shall conduct its reviews in a manner that does not unduly inhibit the autonomy granted to the School.
- J. Site Visits.** The Authorizer may conduct School site visits in accordance with the Authorizer's policy. Reports from any School site visit shall be made available to the School and shall be included in the School's annual Performance Report.

SECTION 5: SCHOOL OPERATIONS

- A. In General.** The School and the Charter Holder shall operate at all times in accordance with all federal and state laws, rules, regulations, local ordinances, and applicable Authorizer policies.
- B. Maximum Enrollment.** The maximum number of students who may be enrolled in the School, across all programs, shall be 390.
- C. Equitable Enrollment Procedures.** The School shall make student recruitment, admissions, enrollment, and retention decisions in a nondiscriminatory manner and without regard to race, color, creed, national origin, sex, marital status, religion, ancestry, disability or need for special education services. In no event may the School limit admission based on race, ethnicity, national origin, disability, gender, income level, athletic ability, or proficiency in the English language. If there are more applications to enroll in the School than there are spaces available, the School shall select students to attend using a random selection process that shall be publicly noticed and open to the public.
- **Calendar.** The School shall operate on a traditional nine-month calendar in which the last day of the regular term shall fall on or before June 30
 - The School will offer a summer school session for the purpose of acceleration and/or credit recovery.
- D. School Facilities.** The School shall operate at the following location(s): 378 Emerson Ln, Bonners Ferry, ID 83805. The School, upon request of the Authorizer, shall provide facilities documentation, including occupancy permits, fire marshal reports, building inspection reports, and health department reports for any facility newly occupied by the School, and any remodeling or construction project for which such documentation is necessary in accordance with Authorizer policy and in accordance with law, rule, regulations, and authorizer policy.
- E. Attendance Area.** The School's primary attendance area, as defined in §33-5206(1), shall be used for the purposes of determining applicability of this enrollment preference category, as defined in §33-5206(13).
- The School's on-site programs shall have a primary attendance area as follows:
 - NICA is located in the Bonners Ferry community, six miles from downtown Bonners Ferry. The intent is for the entire Bonners Ferry and surrounding communities to be included in the primary attendance area.
 - The boundaries of the primary attendance area of Boundary County begin east of the Idaho/Montana border and south of the US/Canadian border at 49.000, -

- 116.049 and extend along the US/Canadian border until 49.000, -116.56489.
- From the US/Canadian border the primary attendance area continues east in a line to 48.88879, -116.44694, near Copeland, and continues along the points of 48.79841, -116.4181 and 48.69897, -116.41114 to include the communities along this route.
- The boundary continues to 48.62642, -116.4112 and then to 48.60406, -116.45523 to include the communities of Bonners Ferry, Moravia, and Burns.
- The boundary continues south to 48.45829, -116.543 to 48.31258, -116.58694 and then to 48.30139, -116.58955 to include the communities of Emira, Samuels, Colburn, and Bronx. From here the boundary follows Gooby Road for 0.8 miles.
- The boundary continues in a straight line from Gooby Road to the shore of Lake Pend Oreille at 48.28753, -116.54569 to include the area north of this line.
- The primary attendance zone then follows the shoreline until 48.32322, -116.44008 to include the communities of Ponderay, Kootenai, Boyer, and Culver.
- The boundary then follows the Colburn Culver Road for 5.84 miles to 48.40774, -116.44016 and includes the area north of this line.
- The boundary continues in a straight line to 48.5166, -116.36725 and then to the Idaho/Montana border at 48.60387, -116.04924 and includes the area east of this border.
- The boundary continues along the Idaho/Montana border until it meets up with the US/Canadian border at 49.00084, -116.049 to include the communities of Moyie Springs and Good Grief.

- F. Staff.** The School's instructional staff shall be certified as required by the State Board of Education. The School shall ensure that all full-time staff members are included in and covered by the Public Employee Retirement System of Idaho, federal social security, unemployment insurance, worker's compensation insurance, and health insurance.
- G. Alignment with All Applicable Law.** The School shall comply with all applicable federal and state laws, rules, and regulations. In the event any such laws, rules, or regulations are amended, the School shall be bound by any such amendment upon the effective date of said amendment.

SECTION 6: SCHOOL FINANCE

- A. General.** The School shall comply with all applicable financial and budget laws, rules, regulations, and financial reporting requirements, as well as the requirements contained in the School's Performance Framework.
- B. Financial Controls.** At all times, the Charter Holder shall ensure that the School maintains appropriate governance, managerial procedures, and financial controls, which shall include, but not be limited to: (1) following commonly accepted accounting practices and the capacity to implement them; (2) maintaining a School-dedicated checking account; (3) adopting and maintaining adequate payroll procedures; (4) adopting and maintaining procedures for the creation and review of monthly and quarterly financial reports, which procedures shall specifically outline the identification process to select the individual who will be responsible for

preparing such financial reports in the following fiscal year; (5) adopting and maintaining internal control procedures for cash receipts, cash disbursements and purchases; and (6) maintaining asset registers and financial procedures for grants, all in accordance with state and federal laws, rules, regulations, and Authorizer policy.

- C. **Financial Audit.** The School shall submit audited financial statements from an independent auditor to the Authorizer no later than November 1 of each year.
- D. **Annual Budgets.** The School shall adopt a budget for each fiscal year prior to the beginning of the fiscal year. The budget shall be in the Idaho Financial Accounting Reporting Management Systems (IFARMS) format or any other format as may be reasonably requested by the Authorizer.

SECTION 7: TERMINATION, NON-RENEWAL AND REVOCATION

- A. **Relinquishment.** Should the Charter Holder choose to relinquish its Charter before the expiration of this Certificate, it may do so upon written notice to the Authorizer. In such a case, the Authorizer's closure protocol shall begin immediately following written notification.
- B. **Nonrenewal.** The Authorizer may non-renew the Charter at the expiration of the Certificate if the School failed to meet one or more of the terms of its Certificate, including the Performance Framework. The Charter Holder may appeal the Authorizer's decision to non-renew to the State Board of Education.
- C. **Revocation.** The School's Charter may be revoked as provided by Idaho Code section 33-5209C. In such an event, the Authorizer shall consider whether to revoke the School's Charter at a Revocation hearing. The decision shall be made at that time. The Charter Holder may appeal a decision to revoke directly to the State Board of Education.
- D. **Closure.** The Authorizer's closure protocol shall begin immediately after a decision to relinquish is made by the Charter Holder, or a decision to revoke or non-renew or is made by the Authorizer. Closure protocol shall begin regardless of whether the Charter Holder appeals the decision. In the event that closure protocol begins, the School shall cease operations no later than the following June 30. Closure protocol shall only cease if the State Board of Education overturns the Authorizer's decision.


SECTION 8: MISCELLANEOUS

- A. **No Employee or Agency Relationship.** None of the provisions of this Certificate will be construed to create a relationship of agency, representation, joint venture, partnership, ownership, or employment between the Parties.
- B. **Additional Services.** Except as may be expressly provided in this Certificate, as set forth in any subsequent written agreement between the Parties, or as may be required by law, neither Party shall be entitled to the use of or access to the services, supplies, or facilities of the other.
- C. **No Third-Party Beneficiary.** This Certificate shall not create any rights in any third parties, nor shall any third party be entitled to enforce any rights or obligations that may be possessed by either party to this Certificate.
- D. **Amendment.** This Certificate may be amended by agreement between the Parties in accordance with Authorizer policy. All amendments must be in writing and signed by the Parties.

IN WITNESS WHEREOF, the Parties have executed this Performance Certificate to be effective
December 14, 2023.



Chairman
Idaho Public Charter School Commission


Marvin Lasnick (Feb 13, 2024 10:23 MST)

Chairman
North Idaho Classical Academy LLC Governing Board

Appendix A: Performance Framework

Appendix B: Conditions

Appendix C: Charter

Appendix D: IPCSC Closure Protocol

Appendix A: Performance Framework



PERFORMANCE FRAMEWORK GUIDANCE: ACADEMIC MEASURES

Adopted 8/13/2020

Revised 4/14/2022

Idaho Public Charter School Commission

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Alan Reed, Chairman

Jacob Smith, Director

ACADEMIC MEASURES

All School Measures

1. Math Proficiency
2. ELA Proficiency
3. Math Growth
4. ELA Growth
5. Literacy Proficiency
6. College and Career Readiness

Comparison Group: Specific to school.

1. MATH PROFICIENCY

Proficiency Rate: The IPCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Math and ELA Proficiency Rubric	
Exceeds Standard	The school's proficiency rate is greater than one standard deviation above the mean of the identified comparison group, OR The school's proficiency average is in 90 th percentile of all Idaho schools.
Meets Standard	The school's proficiency rate is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group.
Approaches Standard	The school's proficiency rate falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The school's proficiency rate is more than one standard deviation below the mean of the identified comparison group, OR the school has been identified for comprehensive or targeted support for three consecutive years as per the Idaho Consolidated Plan.

2. ELA PROFICIENCY

Proficiency Rate: The IPCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Math and ELA Proficiency Rubric	
Exceeds Standard	The school's proficiency rate is greater than one standard deviation above the mean of the identified comparison group, OR The school's proficiency average is in 90 th percentile of all Idaho schools.
Meets Standard	The school's proficiency rate is equal to the mean OR Falls between the mean and one standard deviation above the mean of the identified comparison group.
Approaches Standard	The school's proficiency rate falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The school's proficiency rate is more than one standard deviation below the mean of the identified comparison group, OR the school has been identified for comprehensive or targeted support for three consecutive years as per the Idaho Consolidated Plan.

3. MATH GROWTH

Growth Rate: The IPCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Growth Rubric Math	
Exceeds Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency is greater than one standard deviation above the mean of the identified comparison group, OR The school's growth rate is in the 90 th percentile of all Idaho public schools.
Meets Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group, OR The growth rate increased by at least 10% over the previous year.
Approaches Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment made adequate growth toward proficiency is more than one standard deviation below the mean of the identified comparison group.

4. ELA GROWTH

Growth Rate: The IPCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Growth Rubric ELA	
Exceeds Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency is greater than one standard deviation above the mean of the identified comparison group, OR The school's growth rate is in the 90 th percentile of all Idaho public schools.
Meets Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group, OR The growth rate increased by at least 10% over the previous year.
Approaches Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment made adequate growth toward proficiency is more than one standard deviation below the mean of the identified comparison group.

5. LITERACY PROFICIENCY

Literacy Proficiency Rate: The IPCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Literacy Proficiency Rubric	
Exceeds Standard	<p>One of the following is true:</p> <ul style="list-style-type: none"> The school's proficiency rate on the spring administration of the statewide literacy assessment is greater than one standard deviation above the mean of the identified comparison group; the school's proficiency rate on the spring administration of the statewide literacy assessment is at or above 90%; <p>OR</p> <ul style="list-style-type: none"> The fall to spring change in proficiency rate is 20% or greater.
Meets Standard	<p>The school's proficiency on the spring administration of the statewide literacy assessment is equal to the mean or within one standard deviation above the mean of the identified comparison group; OR The school's fall to spring change in proficiency rate is between 10%-19%.</p>
Approaches Standard	<p>The school's proficiency on the spring administration of the statewide literacy assessment falls within one standard deviation below the mean of the identified comparison group.</p>
Does Not Meet Standard	<p>The school's proficiency rate on the spring administration of the statewide literacy assessment is more than one standard deviation below the mean of the identified comparison group.</p>

6. COLLEGE AND CAREER READINESS

Adjusted Cohort Graduation Rate (ACGR): Alternative schools will be evaluated based on their 5-Year ACGR. All other schools will be evaluated based on their 4-Year ACGR.

Graduation Rate: The IPCSC will use either the 4-Year ACGR as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

C&C Readiness Rubric	
Exceeds Standard	The school's 4-Year ACGR is greater than one standard deviation above the identified comparison group, OR The school's ACGR is 90%.
Meets Standard	The school's 4-Year ACGR is equal to the mean OR Falls between the mean and one standard deviation above the mean of the identified comparison group.
Approaches Standard	The school's 4-Year ACGR falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The school's 4-Year ACGR is more than one standard deviation below the identified comparison group.

OPERATIONAL MEASURES

BOARD STEWARDSHIP

1. Governance Structure
2. Governance Oversight
3. Governance Compliance

OPERATIONAL MANAGEMENT

4. Student Services
5. Data Security and Information Transparency
6. Facility and Services
7. Operational Compliance

BOARD GOVERNANCE

1. Governance Structure Rubric

Data Sources: Board bylaws, articles of incorporation, and any courtesy letters or notifications issued to the school by entities responsible for oversight or enforcement.

Governance Structure Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<ul style="list-style-type: none"> • Board Bylaws are compliant with ID law. • Articles of Incorporation are current. • No investigations were conducted into either ethical behavior or conflict of interest regarding any board director. • The board did not experience an Open Meeting Law violation that needed to be cured this year.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

2. Governance Oversight Rubric

Data Sources: Board meeting minutes, school policies, continuous improvement plan (or other strategic planning evidence if submitted by the school), and verification of submission of annual administrator evaluation.

Governance Oversight Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<ul style="list-style-type: none"> • The board reviews academic data in a timely and thorough manner. • The board reviews financial reports in a timely and thorough manner. • The board maintains compliant policies. • The board engages in strategic planning. • The board conducts a compliant annual evaluation of their school leader and/or management organization.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

3. Governance Compliance Rubric

Data Sources: If applicable, courtesy letters/notifications of concerns, investigation, or findings issued to the school by entities responsible for oversight or enforcement, and any documentation of correction provided by the school.

Governance Compliance Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	The IPCSC did not issue any courtesy letters or notify an external investigative body of compliance concerns this year.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

OPERATIONAL MANAGEMENT

4. Student Services Rubric

Data Sources: If applicable, any notifications or courtesy letters issued by the SDE or SBOE which required corrective action with regard to the school's ELL, SPED, or College and Career Readiness programs, as well as any documentation submitted by the school evidencing correction.

Student Services Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	All of the following are true: <ul style="list-style-type: none">• The school's English Language Learner program is in good standing;• The school's Special Education program is in good standing; The school's college and career readiness program is in good standing; and• The school's federal programs are in good standing.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

5. Data Security and Information Transparency Rubric

Data Sources: periodic desk audit of school website, and any formal notifications regarding data security or public records compliance.

Data Security and Information Transparency Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<ul style="list-style-type: none"> • The school's website is compliant with I.C. 33-133(7) (data collection, access, and security policy); I.C. 33-320 (continuous improvement plan); and I.C. 33-357 (expenditures updated monthly, contracts, performance reports, and annual budgets). • The school did not experience any issues involving data security this year. • The school did not experience any compliance issue regarding public records requests this year.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

6. Facility and Services Rubric

Data Sources: Verification of meal service program and transportation services via public documents and/or school website, and any notifications of concerns regarding occupancy or safety issued to the school by entities responsible for oversight or enforcement.

Facility and Building Services Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<ul style="list-style-type: none"> • The school's occupancy certificate is current. • The school maintains current safety inspections and drills. • The school provides daily transportation to students in compliance with Idaho Code. The school provides a compliant lunch program.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

7. Operational Compliance Rubric

Data Sources: Periodic observation of enrollment lottery, and if applicable, any corrective action plans issued by the SDE not related to special education, ELL, or college and career readiness (as these are captured elsewhere), or formal notification of late reports or enrollment violations.

Operational Compliance Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<ul style="list-style-type: none">• Required reports are submitted accurately and on time.• The school maintains a compliant enrollment process.• No correct action plans were issued by the SDE this year.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

FINANCIAL MEASURES

NEAR TERM HEALTH

1. Current Ratio
2. Unrestricted Days Cash
3. Default
4. Enrollment Variance

SUSTAINABLE HEALTH

5. Total Margin and 3Yr Aggregated Total Margin
6. Cash Flow and Multi-Year Cash Flow
7. Debt Service Coverage Ratio
8. Debt to Asset Ratio
9. Financial Compliance Rubric

NEAR-TERM HEALTH

1. Current Ratio

Calculation: Current Assets divided by Current Liabilities

Data Source: Annual Fiscal Audit Report

Current Ratio Rubric	
Exceeds Standard	The school has a current ratio of more than 1.5
Meets Standard	The school has a current ratio of at least 1.1 (or between 1.0 and 1.1 with a 1-year positive trend)
Approaches Standard	The school has a current ratio of between .9 and 1.0 (or between 1.0 and 1.1 with a 1-year negative trend)
Does Not Meet Standard	The school has a current ratio of .9 or less.

2. Unrestricted Days Cash

Calculation: Unrestricted Cash and investments divided by ((Total Expenses minus Depreciation Expense) / 365)

Data Source: Annual Fiscal Audit Report

Unrestricted Days Cash Rubric	
Exceeds Standard	The school has more than 60 days cash on hand
Meets Standard	The school has 60 days cash OR Between 30- and 60-days cash and one-year trend is positive. *Note: Schools in their first or second year of operation must have a minimum of 30 days cash.
Approaches Standard	The school has between 15-30 days cash OR Between 30-60 days cash, but one-year trend is negative.
Does Not Meet Standard	The school has fewer than 15 days cash on hand.

3. Default

Calculation: No calculation.

Data Source: Annual Fiscal Audit Report, Terms of Debt, Other Formal Notifications Received by School.

Default Rubric	
Exceeds Standard	The school has met standard for at least 3 consecutive years, including the most recently completed school year.
Meets Standard	The school is not in default of any financial obligations and did not experience any instances of default during the fiscal year. Financial obligations include, but are not limited to, making payments to vendors and utility services on time, complying with all loan covenants, filing any reports required for maintenance of grants or philanthropic funds, meeting all tax obligations, and operating without financial judgements or property liens.
Approaches Standard	The school experienced one or more instances of minor default during the fiscal year (such as making late payments); however, the school is not currently in default of any financial obligations.
Does Not Meet Standard	School is currently in default of financial obligations.

4. Enrollment Variance

Calculation: Actual enrollment as of the first Friday in November (drawn from ISEE) divided by enrollment projections as submitted directly to the IPCSC in July.

Data Source: ISEE and direct school report

Enrollment Variance Rubric	
Exceeds Standard	The school has met standard for at least 3 consecutive years, including the most recently completed school year.
Meets Standard	Enrollment variance is equal to or greater than 95%.
Approaches Standard	Enrollment variance was between 90% and 95%, OR The enrollment variance was less than 90% and the school provided a mid-year amended budget evidencing at least a break-even budget based on mid-term enrollment and any resulting revenue adjustments.
Does Not Meet Standard	Enrollment variance was less than 90% and the school did not provide evidence of mid-year budget amendments or operational changes evidencing at least a break-even budget based on mid-term enrollment and any resulting revenue adjustments.

SUSTAINABLE HEALTH

5. Total Margin and 3Yr Aggregated Total Margin

Calculation:

Most Recent Year Total Margin: 2019 Net Income divided by 2019 Total Revenue.

3-Year Aggregated Total Margin: (2019 Net Income +2018 Net Income +2017 Net Income) divided by (2019 Total Revenue +2018 Total Revenue +2017 Total Revenue)

Data Source: Annual Fiscal Audit Report

Total Margin and 3-Yr Aggregated Total Margin	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<p>Aggregated 3-year Total Margin is positive and the most recent year Total Margin is positive</p> <p>OR</p> <p>Aggregated 3-Year Total Margin is greater than -1.5 percent, the trend is positive for the last two years, and the most recent year Total Margin is positive.</p> <p>*Note: For schools in their first or second year of operation, the cumulative Total Margin must be positive.</p>
Approaches Standard	Aggregated 3-Year Total Margin is greater than -1.5 percent, but trend does not "Meet Standard".
Does Not Meet Standard	Aggregated 3-Year Total Margin is less than or equal to -1.5 percent OR The most recent year Total Margin is less than -10 percent.

6. Cash Flow and Multi-Year Cash Flow

Calculation (example years are included as reference):

Most Recent Year Cash Flow: 2020 Cash and Investments minus 2019 Cash and

Investments Previous Year Cash Flow: 2019 Cash and Investments minus 2018

Cash and Investments Multi-Year Cash Flow: 2020 Cash and Investments minus

2018 Cash and Investments

Data Source: Annual Fiscal Audit Report

Cash Flow and Multi-Year Cash Flow	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<p>Multi-Year Cumulative Cash Flow is positive, and Cash Flow is positive in the most recent year is positive,</p> <p>OR</p> <p>Multi-Year Cumulative Cash Flow is negative, but documentation identifies this as a result of a one-time, planned purchase (such as a facility remodel).</p> <p>*Note: Schools in their first or second year of operation must have positive cash flow.</p>
Approaches Standard	Multi-Year Cumulative Cash Flow is positive, but Cash Flow is negative in the most recent year.
Does Not Meet Standard	Multi-Year Cumulative Cash Flow is negative, and no documentation identifies this as a result of a one-time, planned purchase.

7. Debt Service Coverage Ratio

Calculation:

If school owns its facility or if the school leases its facility and the lease is capitalized:
 (Net Income + Depreciation Expense + Interest Expense) divided by (Principal + Interest + Lease Payments)

If school leases its facility and the lease is not capitalized: (Facility Lease Payments + Net Income + Depreciation Expense + Interest Expense) divided by (Principal + Interest + Lease Payments)

Data Source: Annual Fiscal Audit Report

Debt Service Coverage Ratio Rubric	
Exceeds Standard	The school's debt service coverage ratio is 1.5 or greater OR The school operates debt-free.
Meets Standard	Debt Service Coverage Ratio is between 1.1 and 1.49
Approaches Standard	The school's debt service coverage ratio is between .9 and 1.09
Does Not Meet Standard	Debt Service Coverage Ratio is less than .9

8. Debt to Asset Ratio

Calculation: Total Liabilities divided by Total Assets

Data Source: Annual Fiscal Audit Report

Debt to Asset Ratio	
Exceeds Standard	The school has met standard for 3 consecutive years, including the most recently completed school year., OR The school operates debt-free.
Meets Standard	The school's Debt to Asset Ratio is less than 0.9
Approaches Standard	The school's Debt to Asset Ratio is between 0.9. and 1.0
Does Not Meet Standard	The school's Debt to Asset Ratio is greater than 1.0

9. Financial Compliance Rubric

Calculation: Total Liabilities divided by Total Assets

Data Source: Annual Fiscal Audit Report, Desk Audit of Policies, Other Formal Notifications Received by School

Financial Compliance Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<ul style="list-style-type: none">• Accounting Practices: finances are managed in compliance with GAAP.• Financial Transparency: expenditures and contracts are posted on the school's site.• Internal Controls: the school's internal controls are compliant.
Approaches Standard	The school was informed of non-compliance with accounting practices, financial transparency, or internal controls, and prompt action to correct is in evidence.
Does Not Meet Standard	The school is operating under a notification of fiscal concern or a notification of possible or imminent closure OR The school was informed of non-compliance with accounting practices, financial transparency, or internal controls and the issues were not corrected within 30 days.

Appendix B: Conditions

Appendix B: Conditions

- 1. Condition 1: Charter holder provides the IPCSC with documentation confirming that the senior loan (as it is described in the petition included in the IPCSC's December 14th meeting materials) is fully executed, and that the anticipated grant funds (as they are described in the petition included in the IPCSC's December 14th meeting materials) are received by the school by June 30, 2024.**

Appendix C: Charter

AN AMERICAN CLASSICAL SCHOOLS
OF IDAHO PETITION



K-12
Opening 2025

PO Box 734
Bonners Ferry, Idaho 83805

September 14, 2023

Point of Contact:
Dr. Jacob Francom
jfrancom@nicak12.org

Board Chair:
Marvin Lasnick
mlasnick@acs-id.org

North Idaho Classical Academy does not discriminate on the basis of race, religion, color, national origin, sex, or disability in providing education services, activities, and programs including vocational programs, in accordance with Title VI of the Civil Rights Act of 1964, as amended; Title IX of the Educational Amendments of 1972; and Section 504 of the Rehabilitation Act of 1973, as amended. Any variance should be brought to the attention of the administration through personal contact, letter, phone, or email.

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EXECUTIVE SUMMARY

This Petition outlines the plan to open North Idaho Classical Academy (NICA) in the Bonners Ferry community in time for the 2025-2026 school year. NICA will serve students from Boundary and Bonners Counties in the northern part of Idaho including, but not limited to Bonners Ferry, Moyie Springs, Naples, Samuels, and Ponderay. NICA will open as a K-6 school in August 2025 and will add an additional grade each year, growing to serve up to 390 students (30 per grade) in grades K-12 by the 2032/2033 school year.

NICA is an American classical school and a Hillsdale K-12 Candidate Member School. American classical education is a variant of classical education that blends an intensive focus on the development of literacy and numeracy in the early years with a rigorous liberal arts and science curriculum that students grow into as they advance in grade level. The American aspect of the model refers to elements that distinguish it from other types of classical education, including a comprehensive civics program that students participate in throughout their K-12 education and an emphasis on character development, informed by the Western philosophical tradition. NICA's curriculum is provided free of cost through its partnership with the Office of K-12 Education at Hillsdale

College. In addition to curricular resources, Hillsdale K-12 also provides leadership and instructional training to administrators and faculty at member schools. American classical education has proven successful in Fruitland, Idaho and throughout the United States.

The mission of NICA is to train the minds and improve the hearts of students through a classical, content-rich curriculum that emphasizes virtuous living, traditional learning, and civic responsibility. NICA will be governed by the board of American Classical Schools of Idaho (ACSI). ACSI is a 501c-3 organization and accompanying foundation (for philanthropic purposes). ACSI will also function as a School Support Office (SSO). This SSO operates exclusively for benefit of NICA, Idaho Novus Classical Academy (INCA), and Treasure Valley Classical Academy (TVCA), to create economies of scale for services such as business management, food service, transportation, and instructional support.

ADDITIONAL INFORMATION REQUESTED BY CHARTER COMMISSION STAFF

The Charter Commission staff requested additional information about a School Support Office and how this differs from an Educational Management Organization (EMO), Educational Services Provider (ESP), etc.

American Classical Schools of Idaho (ACSI) is the School Support Office (SSO) for NICA and other ACSI-member schools. ACSI is an innovative and adaptive entity designed to provide tailored support and assistance to ACSI-affiliated schools. The SSO's operating philosophy is rooted in a collaborative and responsive approach, wherein its primary focus is to fulfill the specific needs and preferences of school leaders. This means that the SSO does not operate on a pre-defined set of responsibilities, but rather it dynamically evolves in response to the requirements of individual schools within the ACSI network.

The central tenet of the SSO is to function as a service-oriented resource for school leaders. It aims to empower and assist school administrators by aligning its activities with their goals and priorities. This approach is different from conventional models, as it seeks to align with school leader priorities, allowing them to take the lead in shaping the support they receive so they can focus on academic leadership and day-to-day operations.

ACSI services and support are dedicated solely to schools affiliated with the ACSI network, reinforcing a strong sense of commitment and partnership within this community. The costs of the support provided by the ACSI SSO will be no more than 10% of each school's general budget.

INTRODUCTION

North Idaho Classical Academy (NICA) is proposed as a tuition-free, open enrollment, public charter school available to families who reside within Boundary and Bonners Counties, Idaho. NICA will provide an American classical education which is based on a disciplined, classical curriculum grounded in the civic traditions and history of the United States.

One aspect of the legislative intent noted in Idaho Code § 33-5202 is to “Provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system.” The founding group has collected information from families who intend to enroll their children at NICA through the school website and social media. This data (fully described in Section IV) illustrates the interest, support, and desire within northern Idaho for expanded choice and access to American classical education.

The founding members of NICA live in Boundary and Bonners Counties, and most have children or grandchildren who attend or have attended the area school districts. The founding members are seeking educational alternatives that would provide a more rigorous and traditional form of education. The founding

group has diverse backgrounds, experiences, and training (outlined in Section III). Their efforts are supported by external entities that are recognized as leaders in their respective fields, including BLUUM and Hillsdale College. American Classical Schools of Idaho (ACSI) seeks to meet the demand for greater access to American classical education in northern Idaho by opening NICA for the first time at the beginning of the 2025-2026 school year.

NICA will collaborate with Hillsdale College's Office of K-12 Education in the design and execution of the educational program, as evidenced by the letter of intent included in Appendix Series H. There is no other school in the proposed attendance area that uses this model. Further, the school will grow to serve students from kindergarten through 12th grade. Such a model reinforces the school's mission by laying a solid foundation of classical learning in the elementary years, then building on that foundation with robust inquiry into both the human and natural world—with the arts—that exceeds what many colleges and universities accomplish in the liberal arts and sciences. Thus, NICA will provide the parents of Boundary and Bonner Counties with an exceptional option among the educational opportunities available to their children. Hillsdale College has collaborated with dozens of other classical schools in multiple states to implement an American classical curriculum and their model has shown success across a wide variety of student and community backgrounds, regardless of geographic location. This includes the IPCSC-authorized Treasure Valley Classical Academy (TVCA) in Fruitland, Idaho. The curriculum is characterized

by a strong emphasis on language, rich content in a core curriculum of traditional subjects, and a focus upon the American historical, literary, and civic inheritance.

MISSION STATEMENT

The mission of North Idaho Classical Academy is to train the minds and improve the hearts of students through a classical, content-rich curriculum that emphasizes virtuous living, traditional learning, and civic responsibility.

NICA will partner with families to shepherd their children through the development of character and knowledge. These efforts hinge on both curricular and extracurricular offerings, to nurture the child's humanity with constant consideration of who they may become. As detailed in Section I of this Petition, NICA will develop within its students the intellectual and personal habits and skills upon which responsible, independent, and flourishing lives are built, in the firm belief that such future citizens are the basis of a free and just society. The time-honored liberal arts and science curriculum and classical pedagogy direct students toward mastery of the fundamentals of literacy and numeracy, exploration of the arts and sciences, and understanding of the foundational tenets of the American heritage. The curriculum by purpose and design includes a survey of American intellectual and cultural traditions as they have been developed and refined over centuries.

The classical content of the curriculum refers to those traditional works of literature, history, and philosophy that embody perennial truths of the human

soul and which remain compelling because they present these truths in memorable or beautiful ways. These classics are admired not because they are old; rather they are admired because they are timeless and the lessons they offer transcend the popular culture of a given generation. The classics provide the most thoughtful reflections on the meaning and potential of human life. The Great Books include students in a conversation which spans millennia and seeks to address the enduring questions of the human heart and mind.

To help implement this mission, NICA will make use of its growing partnership with the Hillsdale Office of K-12 Education. As such, NICA will be able to utilize startup training, ongoing professional development, and curricular materials developed by Hillsdale K-12 staff, all at no cost to NICA. Additionally, the partnership with Hillsdale College provides an outlet for professional collaboration with dozens of similar schools in the rapidly growing Hillsdale K-12 network.

VISION STATEMENT

The vision of North Idaho Classical Academy is to form future citizens who uphold the ideals of our country's founding and promote the continuation of our American experiment—through a classical, great books curriculum designed to engage the student in the highest matters and the deepest questions of truth, justice, virtue, and beauty.

NICA will educate students who will be stewards of the American traditions that established the pillars of our free society. Participation in the Great Conversation is essential for the perpetuation of these traditions. Therefore, the aim of NICA is to provide a classical liberal arts and science education that focuses on the highest matters and the deepest questions of truth, justice, virtue, and beauty. Where possible, we must engage those ideas and principles in the original texts, which have both intrinsic value and beauty and are worthy of study and contemplation. We also find a clear expression of this legacy in the founding documents of the United States as an experiment in self-government under law based on the literary and scientific education of the founders themselves. As they sought to avoid the problems of pure democracy as seen in Athens and of a republic that gave way to an empire in Rome and despotism in Europe, we too must engage with those ideas to have a citizenry that understands the perils of each. NICA will provide students the benefit of a content-rich, classical, great books curriculum that assists them in understanding, examining, and fostering an appreciation for America's founding principles.

CORE VIRTUES

The American classical education model involves a school culture centered around classical virtues. Core virtues are incorporated into the curriculum and provide the basis for the high expectations students and staff are held to.

Additionally, all school and classroom rules are connected to these virtues and students receive explicit and ongoing instruction in the meaning and manifestation of virtue in their education and lives. This emphasis on virtuous living is reflected in the mission and vision statements and is a hallmark of American classical education. NICA students will be active participants in implementing their learned virtues as part of their character training. Although an appropriate array of virtues will be taught through the curriculum, faculty and staff will inculcate the following official core virtues in the school's culture: courage, courtesy, honesty, perseverance, self-government, and service.

NICA's aim is to develop the academic potential and personal character of each of its students, regardless of background, socioeconomic status, or innate ability, and to graduate them fully prepared to participate as informed, responsible, and active citizens in their communities. NICA's vision for its students is not limited solely to their academic achievement and scores on standardized tests. Personal responsibility, virtues, and discipline will be modeled and expected. NICA will actively foster a sense of civic responsibility along with a belief in striving for individual achievement in all its students.

GROWTH PLAN

As detailed in Section IV of this Petition, NICA will open as a K-6 school and add one grade per year until the K-12 model is fully implemented. Each grade will enroll 30 students, resulting in an initial enrollment of 210 students

and eventually arriving at a maximum capacity of 390 once the school is fully developed.

SECTION I: EDUCATIONAL PROGRAM

The subsections that follow provide a detailed narrative description of the educational program at NICA. Please see Appendix Series H for a succinct overview of the K-12 program.

MEANS

To accomplish our mission, NICA will employ the following means: (1) teach reading and correct spelling through an explicit phonics program that gives children a systematic understanding of English orthography; (2) require memorization of math facts, practice mental math, and explore the larger concepts behind mathematical operations; (3) impart a mastery of language through teaching formal grammar, word origins in order to build vocabulary, and Latin; (4) teach students to acquire mastery in writing through frequent writing assignments of varying lengths combined with study and imitation of the great writers of our tradition; (5) likewise teach students to speak purposefully,

convincingly, and politely in a variety of settings, as well as to listen to, analyze, and appreciate what others have to say, thus bringing students into an active participation in “the Great Conversation”; (6) study great works of literature through close reading and dynamic Socratic discussion; (7) cultivate citizenship and historical knowledge through an intensive study of our American heritage, often using primary sources; (8) teach both the facts and concepts of the sciences from the earliest grades in order to unveil the story of nature; (9) require daily study of the fine arts in grades K-8 with a focus on the great compositions in music and art, as well as theory and performance; (10) build character in young people through explicit training in the moral virtues combined with the study and emulation of good character found in history and literature; (11) hire subject-matter experts steeped in the liberal arts and sciences to bring this both demanding and inspiring education to young people; and (12) provide a disciplined and dynamic school environment in which students love learning, are active participants in their own education and make lasting friendships.

CURRICULUM OVERVIEW

At a true classical school, content is king. As such, we are very explicit in this Petition about NICA’s planned curriculum. NICA will achieve its mission of providing an American classical education to all its students by adhering to the curriculum below. The elements of this curriculum are time-tested, systematic,

coherent with each other, and accessible to all children. Specifically, NICA will teach the following:

- An explicit phonics program developed by Access Literacy, deriving from the research of Orton-Gillingham;
- Curriculum informed by the *Core Knowledge Sequence* in grades K-8 for literature, history and geography, science, the fine arts, and an overarching cultural literacy;
- *Singapore Mathematics* (the Dimensions series) from Kindergarten through pre-algebra;
- *Art of Problem Solving* (for Algebra I/II) and Weeks & Adkins and Euclid (for Geometry);
- Upper-level mathematics courses featuring textbooks such as *Precalculus* by Michael Sullivan, *Trigonometry* by I.M. Gelfand and Mark Saul, *Calculus: An Intuitive and Physical Approach* by Morris Kline, and *Calculus* by James Stewart.
- Systematic grammar instruction using the *Well-Ordered Language* curriculum from Classic Academic Press and the *Wordly Wise Curriculum* from Educators Publishing Service;
- Systematic writing instruction using the *Structure and Style* curriculum from the Institute for Excellence in Writing;
- Latin, beginning in grade six, through grade nine;

- The upper school curriculum featured by the Hillsdale College charter school partnership and contained in the *Hillsdale K-12 Program Guide: A Comprehensive Scope and Sequence*;
- A separate but allied sequence of ancient history through the twentieth century drawing heavily on the reading of primary sources;
- Required courses in composition, government, economics, and moral philosophy;
- The writing of a senior thesis.

A school, like any other human endeavor, allows for a variety of styles and personalities, particularly in a K-12 setting. Yet whether teaching through interrogative questioning, Socratic discussion, or having students demonstrate mastery of the material as in poetry recitations, spelling bees, or working math problems at the board, NICA will expect classrooms to be led by teachers who are kind-hearted subject matter experts and who deliver well-structured, content-rich lessons.

SOURCES OF EDUCATIONAL PHILOSOPHY

The mission of NICA is derived from the history and philosophy of liberal education beginning with the Ancient Greeks and Romans and progressing through the Renaissance, the Enlightenment, and the American Founding. Currently, traditional classical education is experiencing a Renaissance in this

country after decades of lack of interest. Within this broader reform, NICA will follow the principles and curriculum of what ought to be called American classical education, whose mission encourages the formation of human beings and citizens who will flourish in life and serve their communities and country as mindful and productive citizens. In order to embrace this mission, the school holds certain essays and texts to be informative of our approach in content and pedagogy. Among those are the following:

- E. D. Hirsch, *Cultural Literacy*
- E. D. Hirsch, *The Schools We Need and Why We Don't Have Them*
- E. D. Hirsch, *The Making of Americans*
- C.S. Lewis, *The Abolition of Man*
- William Kilpatrick, *Why Johnny Can't Tell Right from Wrong*
- Robert Maynard Hutchins, *The Great Conversation*
- John Locke, *Some Thoughts Concerning Education*
- George Turnbull, *Observations upon Liberal Education*, ed. Terrence O. Moore
- Benjamin Franklin, "Proposals Relating to the Education of Youth in Pensilvania" (sic.)
- Thomas Jefferson, *Virginia Bill for the More General Diffusion of Knowledge*
- Benjamin Rush, "A Plan for the Establishment of Public Schools"

No school can accomplish its mission while leaving its philosophy on the shelf. As such, an important part of faculty training each year will be a return to first principles through a vigorous discussion of a foundational text as well as a Socratic discussion of a piece of literature taught in the curriculum. The teachers will, no doubt, enjoy and appreciate these conversations. Hence, the school's own "professional development" will model what will take place in NICA classrooms.

DESCRIPTION OF EDUCATIONAL PHILOSOPHY

NICA's curriculum was selected to meet the needs of all students within the planned attendance area, and we expect a population of students from diverse backgrounds and with diverse learning abilities. Our curriculum is time-tested and research-based, and has been successfully implemented for students from academically, socially, and economically varied backgrounds across the United States. It seems worth noting that there are a variety of classical models. One model—which might be termed "high classical"—seeks to duplicate the old world, often parochial, education of the societal elite. This is not the NICA model, which is more aptly referred to as "American classical." The term "American classical" implies a more down-to-earth approach. While strongly reliant on the Great Books and a deep examination of the liberal arts and sciences, the objective is to form future citizens who will be great stewards of our republic. As such, this model is more akin to Thomas Jefferson's "farmers who

have read Homer” rather than Plato’s “philosopher king.” The American classical education NICA will offer is a liberal arts and science education intended to equip students for virtuous, knowledgeable, and happy lives. Our students will become engaged citizens and intellectually rigorous contributors, well qualified for future studies in law, medicine, business, engineering, technology, or any other professional or vocational pursuit.

Classical education upholds a standard of excellence and has proven itself over the course of time. NICA’s high standards and research-based curriculum will provide students with a traditional education that will challenge them to excel not only in learning but also in character development. At NICA, high academic achievement, personal discipline, ethics, and responsibility will be consistently reinforced through the study of subjects in the classical tradition. Students will graduate from NICA as highly literate and virtuous citizens who are well prepared to advance into any life endeavor and to inspire others.

NICA will utilize the *Hillsdale K-12 Program Guide*, which makes use of aspects of the *Core Knowledge Sequence*, to meet or exceed all Idaho State Standards and benchmarks. The goal of Core Knowledge is to develop cultural literacy through a systematic curriculum that eliminates gaps and unnecessary repetition. This sequence was developed to provide a comprehensive order to K-8 education with the intention of training students in the art, literature, science, history, math, and language that form their cultural and intellectual inheritance. *The Core Knowledge Sequence* was first published in 1988 and has been

successfully employed and tested in hundreds of schools throughout the United States.

PARTNERSHIP WITH HILLSDALE COLLEGE

Charter schools assisted by the Hillsdale College Office of K-12 Education adhere to, and are consistent with, the following key characteristics and components:

1. The centrality of the Western tradition in the study of history, literature, philosophy, and fine arts.
2. A rich and recurring examination of the American literary, moral, philosophical, political, and historical traditions.
3. The use of explicit phonics instruction leading to reading fluency, and the use of explicit grammar instruction leading to English language mastery.
4. The teaching of Latin.
5. The acknowledgement of objective standards of correctness, logic, beauty, weightiness, and truth intrinsic to the liberal arts and sciences.
6. A school culture demanding moral virtue, decorum, respect, discipline, and studiousness among the students and faculty.
7. A curriculum that is content-rich, balanced, and strong across the four core disciplines of math, science, literature, and history.

8. A faculty, where well-educated and articulate teachers explicitly convey real knowledge to students using traditional teaching methods.
9. A school that uses technology effectively but without diminishing the faculty leadership that is crucial to academic achievement.
10. A school with a plan to serve grades K through 12.

In a Hillsdale-supported classical school, teachers must possess knowledge (#8), authority (#9), and compassion (#6). These abilities allow for lessons with real weight, classrooms with order and discipline, and instruction with purpose and focus. Classes are conducted in a professional and focused manner, understanding that every minute counts. Teachers must take preparation seriously and be watchful in the classroom so that the needs of all students are met, because the teachers recognize the grand project they have undertaken. Teachers who teach classically take responsibility for student learning in the classroom. They look for student comprehension during instruction.

Teaching classically treats each classroom activity with an appropriate degree and mixture of richness, dignity, wonder, and love of the subject so that those same qualities are cultivated in the student, enabling them to mature into knowledge and self-government so that, in the words of Thomas Jefferson, “[Each] may...work out his own greatest happiness.”

As an outside, independent institution of higher learning committed to the liberal arts at the college level, and to the flourishing of K-12 education, Hillsdale is uniquely qualified to assist the governing board with board training, the school leader with leadership training, and the faculty with teacher training. Such training draws upon the experiences of charter schools across the nation that now form a strong partnership, yet one that does not impede local self-government.

Hillsdale College's K-12 initiative is completely funded by donations to the college for that purpose and all support is provided at no cost to charter schools. Hence this partnership is an important asset for a start-up school both financially and mission-wise since the school does not have to weigh "the cost" when deciding on whether to seek first-rate training and advice.

INSTRUCTIONAL PRACTICES AND CURRICULUM

NICA will provide students with a content-rich, American classical education designed to challenge them to excel in both learning and character. What follows is more detail to elaborate on the academic program outlined above.

In the elementary years, NICA will use three key programs in the curriculum: *Literacy Essentials: The Journey from Spelling to Reading*, *Singapore Math Dimensions Series*, and the *Hillsdale K-12 Program Guide*. These programs are designed to lay the foundations of knowledge in the elementary years, and thereby enable students to acquire greater knowledge and

understanding of the world as they progress in age and advance in their studies. Learning the fundamentals is comparable to being taught to use a map and compass. Being able to “land-navigate,” one can enter into the thickest forests, know where he or she is, appreciate the beauty and complexity of nature, and even reach a precise spot on the map—without fear or confusion but rather with joy and a sense of accomplishment.

In the earliest grades, the curriculum focuses primarily on teaching literacy and numeracy. Both subjects are foundational to a student’s education, so the knowledge and habits of thought formed in each must become permanent. Over time, one may forget some of the details learned in history or science class or even parts of the happy songs sung in youth. Yet no one can afford to forget how to spell words or to marshal numbers or to speak correctly. To teach these foundational subjects, NICA will use the *Literacy Essentials* phonics program to teach literacy and the Singapore Math Dimensions sequence to teach numeracy.

Literacy Essentials: The Journey from Spelling to Reading program is a multi-sensory, neuro-linguistic approach for teaching phonics, spelling, reading, handwriting, and parts of grammar. It shares its pedigree with the Orton-Gillingham and Spalding Methods and is similar to the Riggs Institute program. *Literacy Essentials* teaches the 72 letter-sound (phonogram) combinations used in the English language beginning with the easiest sight-to-sound correspondences, working towards those that are most complex. Syllabication is critical to a proper understanding of letter sound relationships, so syllabication is

taught beginning in kindergarten. While learning phonograms and marshalling them into systematic spelling and a growing knowledge of vocabulary, students are formally taught handwriting, to include cursive in the middle elementary years. Further, as students grasp the basics of English literacy, the program lays a foundation in basic grammar and composition using the *Well-Ordered Language* curriculum from Classical Academic Press, the *Wordly Wise* curriculum from Educators Publishing Service, and the *Structure and Style* curriculum from the Institute for Excellence in Writing.

The *Singapore Math Dimensions* series provides students with a strong conceptual foundation in basic mathematics. Singapore mathematics is a proven and internationally benchmarked curriculum that teaches students how to move from the concrete to the pictorial to the abstract. From the earliest grades, this program emphasizes concepts and mental math while employing both physical and graphical illustrations of underlying mathematical rules and phenomena. The program presents mathematical skill building and problem solving such that students have a better understanding of not simply when to use a particular equation, but why. In other words, the program is designed to build conceptual understanding as well as procedural fluency. NICA will use ability grouping for mathematics so students can learn without being overwhelmed and can progress with similarly placed peers. Hence, ability-level groups will be determined at the beginning of each academic year.

The central position of language in the curriculum continues throughout the elementary and middle-school grades. In grades four (4) and five (5), students will learn Latin and Greek roots of English words. In the sixth grade, students will begin to learn formal Latin and will continue with Latin through grade nine (6-9). Latin is introduced and taught alongside English so that students learn the structural underpinnings of their own language, expand their vocabulary, improve their reading comprehension, and build a bridge to modern foreign languages as well.

As students mature in their facility with language, the academic program transitions more of their time and intellectual energy into content-based (as opposed to skill-based) facets of the curriculum. The order and content of these subjects from kindergarten through grade eight (8) is derived from the *Hillsdale K-12 Program Guide* and influenced by the work of the Core Knowledge Foundation. NICA will employ the Hillsdale K-12 curriculum to meet or exceed all Idaho State Standards and benchmarks. The goal of the *Hillsdale K-12 Program Guide* is to build up knowledge and literacy of the American tradition through a systematic curriculum that eliminates gaps in learning and features “spiraling” wherein students re-encounter subjects they have learned as they reach higher levels of cognition. This sequence was developed to provide comprehensive order to K-8 education in the core subjects of literature, science, history, and the arts that constitute the American intellectual inheritance. The principles of the Hillsdale K-12 curriculum and the school’s philosophy embrace

the idea of teachers becoming masters of their subject and thereby utilizing the scope and sequence to craft their own lessons rather than relying on prefab lesson plans. Treasure Valley Classical Academy (TVCA) uses the same Hillsdale K-12 curriculum in their school to great effect.

Although the rhetoric surrounding a classical school often emphasizes the humanities, the sciences are no less important and will not play a secondary role at NICA. The *Hillsdale K-12 Program Guide* focuses on thematically linked science topics and the biographies and discoveries of great scientists. The coherent order of the scope and sequence allows for regular repetition and mastery of the most important facts and concepts in the sciences, such that students are well versed in the fundamentals by the time they reach the demanding high-school science courses.

In the high school years, the students will attain higher levels of thought and inquiry. In high school, NICA will follow the Hillsdale College recommended course sequence, as currently laid out in the *Hillsdale K-12 Program Guide* (see Appendix Series H for K-8 curriculum maps). This comprehensive K-12 scope and sequence lays out the entire curriculum along with curricular maps, subject outlines, curricular components, and detailed supporting materials (e.g. cross-curricular references, pedagogical suggestions, and additional online and digital teacher resources). The high school component includes four (4) years of history, literature, mathematics, and science; three (3) years of foreign language; a semester of composition; a full year of American government; and a semester of

economics and two years (2.0) of moral and political philosophy. In history, students begin with the Ancient Civilizations and Europe (500-1815) in grades nine and ten (9-10), study American government integrated with the Revolution and Founding period of American history (1607-Present) in grade eleven (11), and finish with a year of modern European history (1815-Present) in grade twelve (12). In literature, students read great works, usually in their entirety, with an emphasis on ancient and classical literature in grade nine (9), medieval and British literature in grade ten (10), American literature in grade eleven (11), and modern literature in grade twelve (12). The required track for science is biology in ninth (9), chemistry in tenth (10), followed by two additional science classes in grades eleven (usually physics) and twelve (usually astronomy). In mathematics, students will follow a sequence based on their ability levels, beginning with Algebra I (which many students will take in eighth grade). That sequence will be Algebra I, Geometry (including Euclidian proofs), Algebra II, Trigonometry/Pre-Calculus, Calculus I, and in some cases, Calculus II. Students who prefer to take another math course (such as Statistics) in their senior year rather than calculus may do so. In foreign languages, students will be expected to take at least one (1) year of Latin in high school and two (2) additional years of a foreign language, whether advanced Latin or a modern foreign language.

The culmination of this comprehensive education will be the senior thesis. Seniors will be required to write a lengthy thesis based on a book or an aspect of one of the subjects they have studied that attempts to answer a question of their

own design—that question somehow being connected in a summative way to their educational experience (broadly, the nature of the human and natural world and the various means of human flourishing). The thesis will be written and then delivered orally to fellow classmates, teachers, and invited guests, including parents, and will thereby serve as a rite of passage to an independent life of informed thought and responsible citizenship.

The schools on which NICA is modelled have all had a full fifty-minute lunch period for the upper school students; NICA plans to follow this model. Thus, NICA students can eat lunch, then play sports or help in one of the younger grades or just relax and converse (and sometimes study) for a half hour in the middle of the day, a break they very much appreciate. NICA will also provide room in students' schedules for at least one elective per year from ninth grade onward. Students will be able to take electives in Leadership, Agricultural Science, Orchestra, Choral Ensemble, Studio Art, Drama and Theater, or other options that align with the academic model, based on student interest and demand. After school, students will be able and encouraged to participate in extra-curricular clubs (examples include Airplane & Rocketry Club, Drama Club, Strategic Games Club, and Outdoor Pursuits Club), the fine arts, and for 7th grade and up, competitive athletics (initially cross country, basketball, and soccer). NICA teachers will receive training on how to make homework both useful and manageable so that students of all grades will have time for these activities and to pursue other interests outside of school.

It is also important to mention that the *Hillsdale K-12 Program Guide* (currently version 3.1) receives regular updates based on availability of resources and teacher feedback. NICA will review and update aspects of the educational program as appropriate when new curricular resources are made available.

Expected Student Outcomes

The board, school leaders, teachers, parents, and the students themselves will know NICA is achieving our mission when high standards of academic achievement and civic virtue provide optimal learning opportunities for all students, maintain a high consistent level of discipline, achieve high acceptance rates into post-secondary educational institutions, and when students demonstrate virtuous behavior through schoolwork as well as school and community behavior.

Strong student academic performance is central to a school's existence. Student performance expectations must be aligned with the mission and the educational plan. The student performance expectations will provide student-centered goals that are SMART:

- **Specific**
- **Measurable**
- **Ambitious and attainable**
- **Reflective of the school's mission**

Time-specific with target dates

Those goals are:

- By the end of NICA’s fifth year of operation, 80% of continuously enrolled students assessed will score proficient or higher on the ISAT ELA and Math sections.
- In years 3-5 of operation, NICA's scores on the ISAT for continuously enrolled students will outperform the identified comparison group, including the Bonners Ferry School District #101.
- Once high school grades are established, NICA will have a 100% graduation rate by its 3rd graduation cohort.
- To measure successful training in character development, NICA will administer and review parent satisfaction surveys at the end of each academic year. Most survey questions will utilize a 5-point Likert-type scale. The measure for this character development goal is a question which asks parents to use the 5-point scale (from strongly disagree to strongly agree) to respond to the following prompt: “The school cultivates a sound culture that fosters the virtues and builds good character.” NICA will achieve a 90% or higher positive rating on this prompt each year of operation.

Testing

The following assessments will be used to monitor student progress:

- IRI (K-3)

- ISAT (Mathematics, ELA, and Science as required)
- NWEA MAP
- WIDA Access (ELL students)
- SAT, PSAT, or CLT (as appropriate)
- Teacher-developed pre and post-assessments
- Teacher-developed rubrics

NICA will administer the MAP test within the first month of opening and each subsequent fall and spring thereafter. The MAP math and language exams offer teachers a way to assess how well their students are learning and retaining the material in relation to national norms.

- Singapore Math assessments will be used as placement tests and to demonstrate mastery of the material taught at each level.
- Starting in grade 8 and repeating as often as necessary in subsequent grades to pass the test, a civics test composed of the one hundred (100) questions used by officers of the United States Citizenship and Immigration Services will be given and a passing grade of 90% expected.
- NICA will participate in all state mandated testing. The school will appoint a test coordinator who will oversee the testing program and ensure the testing process is followed with fidelity for all tests. NICA will work with stakeholders to help them understand the

importance of the assessments and the information that can be gained from them.

Overall, the school will meet the state standards by teaching the curriculum in a classical way. Whereas the standards often call for general areas of mastery, such as being able to analyze literary texts in a certain way, the *Hillsdale K-12 Program Guide* requires mastery of specific subjects and texts that meets or exceeds state standards. For example, in history and literature from Kindergarten through second grade, students will have learned the basic symbols and songs of American history and culture, the ancient civilizations of Egypt and Greece, the stories of the early American settlers, the history of the American Revolution, the framing of the U.S. Constitution, numerous fables from Aesop, classic fairy tales, tall tales, the nursery rhymes of Mother Goose, and even the nature of schools in our history through the novels of Laura Ingalls Wilder. Nor does the classical approach simply look at a particular work for a moment, then set it aside, but rather insists upon mastery and often memorization of it so that students may carry that learning with them throughout their lives and thereby compare what they learn in their early education to new things they learn in school and in their own experience. Thus, our students in these early grades will memorize traditional sayings, jingles, children's verses, poetry, songs, the opening lines of the Declaration of Independence, the Preamble to the Constitution, American and world geography, and so on. Further, many of these lessons will quite naturally take the form of building character through mastering

virtues. For example, reading the tale of John Henry is not simply an exercise in cultural literacy but an invitation to acquire the virtues of self-reliance and perseverance.

If the curriculum does not meet or address a specific standard at a given grade, time will be allotted over the course of the year to give that standard proper coverage. Instruction, to this end, will be provided by the school leader to the faculty as a part of the annual professional development.

Utilizing Student Assessment and Performance Data

Student assessment and performance data will be regularly assessed by teachers and administration to guarantee that all students are receiving the support and instruction necessary for their academic growth. NICA will rely heavily upon well-trained teachers to be constantly aware of individual needs within their classrooms. Teachers and administrators will apply the data gathered to drive the intervention strategies and progress monitoring methods, making sure that each is an efficient use of time and resources.

Teachers and administration will hold routine team meetings to discuss the growth and progress of individual students (faculty-wide and grade-band team meetings will alternate every week). The curriculum allows for differentiation, so teachers will be able to accelerate or reinforce a student's learning. At our middle school levels, by offering accelerated and remedial course work, the school will be able to pace students according to their

instructional needs. In middle school, designated staff members will work closely with students to ensure proper class placement and promotion.

For students who are not at least proficient in reading, writing, mathematics, and/or science, the school, in consultation with the student's parent(s), will develop and implement progress monitoring to assist the student in meeting expectations for proficiency. Strategies may include, but are not limited to academic year tiered interventions, before and after-school tutoring, summer-time tutoring, reading instruction, and other extended services including intensive skills development programs.

It is the intention of NICA to use progress monitoring (based on an in-house academic dashboard as well as NWEA MAP data) unless the student has a disability and receives services through an IEP that would more appropriately address the identified deficiencies. NICA may request that struggling students attend remediation programs held before or after regular school hours or during summer.

If upon subsequent evaluation the documented deficiency has not been remediated, the student may be retained. Each student who does not meet minimum performance expectations for the statewide assessment tests in reading, writing, science, and mathematics will continue remedial instruction or supplemental instruction until expectations are met. Progress monitoring will stay active until a student has made sufficient learning gains to illustrate proficiency.

NICA will utilize a multi-tiered system of support (MTSS) framework aligned with best practices and developed in conjunction with educators at Treasure Valley Classical Academy and Idaho Novus Classical Academy. The school will set up systems and methodologies to address student needs that may include data-based goals, reflection and review of instruction and methodology, differentiation of the instruction and other targeted interventions, as well as formative and summative assessments. MTSS will be deployed to prevent academic failure through early intervention, frequent progress measurement, and increasingly intensive research-based instructional interventions for children who continue to have difficulty. Different frameworks are planned for the elementary school (K-6) and upper school (7-12). Fundamentally, MTSS involves categorizing students into tiers of support and ensuring that needs are met in a systematic manner. Our definition of the tiers is as follows:

- Tier 1 (core instruction and universal supports available to all students): Tier 1 consists of the general academic and behavioral instruction and support that is designed and differentiated for all students in all settings. School-wide progress monitoring and screenings are used to ensure that core instruction is effective and to identify students who may need additional support to be successful.
- Tier 2 (supplemental instruction or intervention provided to targeted groups of students): Tier 2 consists of more focused, targeted instruction or intervention and supplemental supports in

addition to and aligned with the core instruction provided through Tier 1. For instance, an additional 30 minutes per day may be devoted to reading in a small group (3-6 students), with a focus on building phonemic awareness and proficiency in key linguistic skills such as syllabication, decoding and encoding. Adjustments can be made within Tier 2 to increase time on task or decrease student/teacher ratio.

- Tier 3 (intensive individualized intervention and supports provided to individual students): Tier 3 consists of the most intense (increased time, narrowed focus, very small group or individual) instruction and intervention based upon individual student need. Tier 3 supports are provided in addition to and aligned with the core (Tier 1) and supplemental (Tier 2) academic and behavioral instruction, interventions, and supports.

The tiers are not a “set” series of interventions or activities that all students move through. Rather, they are fluid and flexible; students may move from a lower to a higher tier and back again, based on documented need. A student may be successful with Tier 1 supports for behavior and mathematics, require supplemental Tier 2 instruction for reading, and need intensive Tier 3 interventions for writing. As the student progresses and the performance gap with grade level and classroom peers closes, the student may no longer need anything beyond Tier 1 (universal instruction). The MTSS framework is designed for all students, including general education students and those receiving special services. “All students” includes those who struggle, those who excel and

demonstrate needs beyond the core, and those who are English language learners. If the school's student services support team determines that a student is not making adequate progress after the provision of effective Tier 1, Tier 2, and Tier 3 intervention and supports for an appropriate amount of time, or that the services are effective but may require substantial and sustained effort that may include special education and related services in order to maintain progress, the team will refer the student for evaluation for exceptional student education.

Data Collection and Analysis

In the elementary school, MAP will be the primary data source used to inform intervention decisions. Student data displayed in grade level reports will be recorded in a spreadsheet that can be shared with decision-making teams as appropriate. The spreadsheet will use a consistent format across grade levels.

In the upper school, grades in PowerSchool will be the primary data source used to inform intervention decisions. Necessary information will be included in the Grade Tracker, which will be compiled to monitor student progress within and across grade levels.

Student achievement data will be cross referenced with specific early warning indicators to inform intervention decisions. Although these definitions will initially be narrow and utilize specific sources of data, it is expected that the system will expand and incorporate a wider collection of information as the

school grows and MTSS is expanded and refined. The initial early warning indicators are as follows:

Elementary

- Tier 3: 1st-20th percentile OR the lowest scoring 5 students per grade level (whichever is the lower number)
- Tier 2: 21st-40th percentile OR the lowest scoring 10 per grade level (whichever is the lower number)

Upper School

- Tier 3: 62% or below in two or more classes
- Tier 2: 62% or below in one class

Team Structure and Composition

Successful deployment of a comprehensive MTSS requires thoughtful construction of teams. In our variant of MTSS, there will be a minimum of three primary teams constructed with the purpose of enabling effective decision-making processes at the faculty level. The primary teams include: (a) an Elementary Data Analysis Team, (b) an Upper School Data Analysis Team, and (c) an MTSS Leadership Team. More information about each team is provided below.

The Data Analysis Teams consist of the principal, deans, director of student services, and faculty chairs from within the elementary or upper schools. The purpose of these teams is to analyze schoolwide data and provide actionable

information and tier recommendations to faculty. Elementary faculty and student services personnel will then form smaller decision-making teams to plan and deliver interventions.

The MTSS Leadership Team exists to monitor the implementation of the MTSS framework, engage in process improvement, plan for the expansion of MTSS, and arrange professional development for the faculty. Members of the MTSS Leadership Team include the principal, deans, and director of student services.

MTSS Timeline, Cycle of Analysis, and Process

MTSS will follow a defined timeline and cycle at NICA. The information that follows describes this process for the elementary school and upper school.

Elementary Timeline and Cycle

- The whole Elementary School Data Analysis Team will meet three times per year (in alignment with MAP benchmarks).
- The fall and winter benchmarks will inform categorization of students into support tiers.
- The spring benchmark will be utilized to develop an understanding of schoolwide growth and inform decisions related to the summer reading program.
- Department/grade band teams (referred to previously as decision-making teams) will meet monthly to plan and follow-up on interventions.

Elementary School Process

- Meetings will occur within 7 days of the end of MAP administration to ensure that there is adequate time to complete make-up testing.
- The team will utilize MAP grade level reports to analyze data grade-by-grade and categorize students into support tiers using the early warning indicator criteria.
 - During this process, the team will decide whether to apply the percentile or lowest scoring student metric on a grade-by-grade basis.
- As decisions are made, a designated member of the team will update the tiers spreadsheet.
- Data will be summarized and provided to faculty within 48 hours of the meeting.
- Faculty decision-making teams will review the data and begin to plan interventions at the next grade band meeting or within two weeks.

Upper School Timeline and Cycle of Analysis

- The whole Upper School Data Analysis Team will meet four times per year (in alignment with report cards).
- Quarters 1-3 inform categorization of students into support tiers.
- Quarter 4 will be utilized to develop an understanding of schoolwide outcomes and inform credit recovery needs.

- Faculty teams (referred to previously as decision-making teams) will meet at the midterm and end of each quarter.

Upper School Process

- Faculty will review student grades and update the Grade Tracker (based on the early warning indicators) at the midterm and end of each quarter.
- The quarterly meeting will occur within 7 days of the date that grades are due.
- The team will review the Grade Tracker and categorize students into support tiers grade-by-grade.
- As decisions are made, a designated member of the team will update the tiers spreadsheet.
- Data will be summarized and provided to faculty within 48 hours of the meeting.
- Faculty decision-making teams will review the data and begin to plan interventions at the next grade band meeting or within two weeks.

PLAN FOR SERVING ALL STUDENTS

A public charter school, as with any public school, by law, must offer a continuum of services for all students. Hillsdale College has a long, documented history of serving all segments of the population without reserve. NICA will

continue to follow that tradition in the K-12 setting. NICA’s aim is to develop the academic potential and personal character of each of its students regardless of socio-economic status, race, religion, color, national origin, sex, or disability and to graduate them fully prepared to participate as informed, responsible, and active members of their community. NICA’s vision for its students is not limited solely to their academic achievement and scores on standardized tests. NICA will effectively serve all students.

Student Demographics in Planned Attendance Area

School District	Economically Disadvantaged Students	Students with Disabilities	Minority Enrollment	Participation in Free and Reduced Meal Program
Idaho	47%	11.6%	18.3%	27.3%
Boundary County School District #101	26.5%	6.1%	10%	26.5%
Lake Pond Oreille School District #84	28%	6.6%	10%	27.8%

Sections of Boundary County and Bonner County are within NICA’s primary attendance area, which will minimally impact these two districts. The table above shows some of the demographics of students in the planned attendance area.

One of the time-tested instructional approaches of the classical model, ability groupings, provides an example of identifying and supporting any student’s needs. Instructional supports and strategies are most effective with flexible ability groupings in the core subjects of reading and math in the

elementary grades. To best differentiate instruction, providing individualized support for all learners while maintaining the same expectations of outcome, ability groups will enable NICA to tailor instructional techniques and class time to meet the needs of all students. Students may be placed into ability groups upon admission using initial assessments that indicate strengths and weaknesses. Students will move across groups as additional assessments suggest. Students are responsible for mastery of the same skills and concepts and are required to take the same assessments regardless of grouping. Using differentiated instructional strategies will enable teachers to optimize the learning of all students.

Special Education

NICA will adopt and comply with the current Idaho Special Education Manual from the Idaho State Department of Education. The school will use the forms for special education as outlined in the Special Education Manual. NICA will also ensure that all facilities are appropriately accessible for students with disabilities. On the school enrollment form, there will be a question asking, “Does your child have an IEP, 504, or any other support plan?” Until special education personnel are hired, the school leader will answer any questions parents may have about services provided by the school and will have access to expertise in this area through Idaho State Department of Education.

Certified special education teachers will be hired to implement special education programs. Classified teaching assistants will be hired and trained to assist the special education teacher with the teaching and support of students with disabilities. With oversight by the student services director and school leader, child find activities and evaluations will be completed within the appropriate time frame.

A continuum of services will be provided at NICA. IEP (Individualized Education Program) teams will be established as set forth by IDEA (Individuals with Disabilities Education Act) and will, for a given student, include the student's general education teacher, a special education teacher, an administrative representative, the parents, other team members as appropriate, and the student himself or herself whenever appropriate, particularly when the student is older.

Student Services Director

NICA's staffing plan and budget include hiring a student services director as early as possible so that incoming existing IEPs can be reviewed. What follows is a sample job description for the student services director and a blueprint for what will eventually become the director of student services as the size of the school and student services department increases.

General

The student services director shall:

- Ensure the academic integrity of the school by overseeing the modifications and accommodations for students in specialized programming;
- Oversee the education of students with IEPs or 504 (Rehabilitation Act of 1973, for students that do not qualify for special education) Plans;
- Assist general education teachers to meet individualized educational goals for students with IEPs, 504 Plans, and ALPs;
- Oversee the Title program and support mechanisms;
- Supervise and evaluate classified student services staff; and
- Set budget priorities for student services and have general knowledge of the department's fiscal status.

Ensure the Academic Integrity for Students with Specialized Programming

To maintain the academic integrity of the school, the student services director shall:

- Oversee school-wide practices to ensure they are aligned with the requirements of the Idaho Special Education Manual;
- Remain faithful to the academic curriculum and character education in the school;
- Understand the importance of the defined curriculum;

- Ensure that modifications and accommodations are consistent with students' individualized needs relative to the school's mission and philosophy;
- Stress the importance of continued student progress both academically and in character development;
- Demonstrate mastery as a teacher to students;
- Develop the intellect of each student to the utmost of his or her ability;
- Develop the personal character of every student;
- Participate in annual professional development;
- Oversee mandated educational processes.

To ensure the proper services and support for students who need accommodations or additional supports, as well as to ensure that the school complies with state and federal laws, the student services director is expected to develop and/or oversee:

- Special Education support and services
- Title support and services
- RTI framework
- English learner program
- Section 504 Plans

- Assistance for general education teachers with implementing specialized programming

To ensure the proper services and support for students who need supplemental programming, the student services director shall:

- Educate school faculty and staff regarding students with disabilities;
- Disseminate information regarding IDEA and ADA (American with Disabilities Act), and any changes or updates to these laws;
- Collaborate with teachers to maintain consistent communication regarding student needs;
- Oversee the effectiveness of modifications and accommodations.

Management of Student Services Department

Management of student services includes the following to ensure appropriate direction to supplemental teaching staff and ensure progress for NICA's students:

- Direct supervision of student services staff;
- Collaborative work with the school leader to recruit and hire the best paraprofessionals, special education teachers, and other personnel for positions that will meet the individual needs of students;
- Definition and coordination of contracts for wrap around services (e.g., psychologist, speech therapist, occupational therapist) with the school leader;

- Oversight of the effectiveness of wrap around services;
- Coordination of services and support to align with student needs;
- Management and monitoring of progress-tracking;
- Management and keeping appropriate confidentiality of all student records and school reports;
- Close coordination with the enrollment coordinator regarding services for incoming students;
- Protecting the confidentiality and professionalism of the faculty and staff with regards to students in supplemental programs;
- Coordination of summer school programming.

Minimum Job Requirements

- Master's degree in a brain-based field (e.g., special education, occupational therapy, speech therapy, or school psychology) or an equivalent combination of education and experience.
- Bachelor's degree in a relevant and appropriate field as it pertains to student learning and development.
- Familiarity with special education laws and regulations regarding IDEA.
- A special education license approved by Idaho Department of Education or the willingness and ability to obtain licensure.
- Experience with students who need additional supports and services.

- Management/supervision experience.
- Ability to speak and write clearly.
- Ability to oversee specialized programming.
- Experience in educational management or administration.
- Previous K-12 education classroom experience.
- Ability to adjust to the needs of the changing student population.

Special Education Evaluation Process

The student services director and the IEP team will review and, if necessary, revise current IEPs and consider the students' needs and continuum of placements and related services in order to meet educational needs as soon as possible.

Whether for students with existing or revised IEPs, or new students entering the school who are identified as needing support, individualized plans will be developed to maximize the students' time with peers in the least restrictive environment. A variety of means of support may be made available according to the needs of each student and as outlined in the IEP.

Outside personnel may be contracted to provide the following services based on need: speech-language pathology, occupational therapy, physical therapy, and school psychologist services. Special transportation may be provided for those students whose IEP requires that service. The need for an extended school year, paraprofessional assistance, adaptive technology, and

assistive technology may be considered and provided if deemed necessary in line with the student's IEP.

When a student is suspected of having a disability that requires specially designed instruction, NICA will form a support team comprised of members consistent with the requirements of the Idaho Special Education Manual to consider a student's eligibility for special education. The team reviews information from various sources including, but not limited to, MTSS data, state standardized tests, classroom grades, formal and/or standardized assessments, curriculum-based measurements, and general progress in the grade level or subject. After reviewing all the data, the team will determine if a referral and subsequent consent for evaluation to determine eligibility for special education services is appropriate. If the student meets eligibility criteria, the team will then seek parental consent for the student to receive special education services.

Whenever students do not clearly meet SPED criteria, the team may refer students to other avenues of support, such as the 504 process.

Behavior intervention plans will be utilized if a student has a disability-related behavior that impacts his or her learning and/or the learning of others.

The IEP team will determine the best avenue and least restrictive environment regarding each student's needs. NICA will utilize an MTSS team meeting format to evaluate student response to such intervention, consisting of problem identification, analysis of the problem, appropriate research-based interventions, and progress monitoring.

In its recruiting efforts, NICA will ensure that prospective parents understand that the school is a public school that intends to meet the needs of all students, to include those with learning disabilities. The school will also work to ensure that parent and student rights are protected, to include in the handling of personally identifiable information in student special education records. All records will be kept confidential and secure.

Discipline and IEPs

The guidelines provided by the IDEA (Individuals with Disabilities Education Act) and the Idaho Special Education Manual will be followed with regard to disciplining students with disabilities. If a student currently has a Behavior Intervention Plan (BIP), the plan will be reviewed to determine if intervention and response steps were implemented appropriately in a given disciplinary situation. If a BIP is not in place, the IEP team will meet to determine whether a Functional Behavior Assessment is appropriate. A BIP may be implemented if the special education team determines that the behavior of the student impacts his or her learning and/or the learning of others. This intervention, if deemed necessary, would be included in the IEP.

English Learners

To meet the needs of bilingual and/or students who have limited English proficiency, NICA will follow the guidelines in the State English Learners (EL)

Guidance for Idaho Districts manual. English Learners fall into three categories:

(1) students whose primary home language is other than English, (2) students from heritage language groups needing enrichment and further development of English while maintaining fluency in their heritage language, and (3) any other students needing enrichment and further development of academic English.

NICA will use the required procedures to appropriately serve the language needs of EL students. These procedures may include the following:

- Identification of the primary or home language other than English by administering the Home Language Survey when students are enrolled.
- If the Home Language Survey indicates a language other than English, administer the WIDA Access Placement Test (W-APT) to determine whether the student is proficient or non-proficient in all language domains and will be placed in an appropriate program within 30 days.
- Student progress will be assessed annually until proficiency is attained.
- For EL students, the school may contract with an appropriately certified EL or bilingual teacher who could provide aid within the classroom to the student(s) if needed.

Within the classroom, the EL teacher may provide support to the classroom teacher in the area of scaffolding, which is providing layered instruction to aid in student comprehension of content and objectives. This

includes strategies such as adjusting speech or providing appropriate background information and experiences to assist the students to grasp the content. In addition, other appropriate strategies will be used to transcend language barriers including the use of visuals and demonstrations to communicate content and develop language skills with EL students. The objective will be to enable the EL student to achieve a mastery of English as soon as feasible.

Depending on the demographics, needs, and resources, one or more program models may be implemented (as per State EL Guidance for Idaho Districts manual):

- In the classroom in a “push-in” setting - teachers assist English language learners with differentiated instruction within the classroom so that students may access the curriculum presented; or
- In a “pull-out” setting - students would be pulled out of the general classroom during non-core instructional time to receive intensive English instruction. In the early grades in particular, these pull-out sessions may reinforce, further explain, or offer more practice in the classroom lessons, particularly in the areas of phonics, grammar, and reading.

The curriculum itself is designed to give students a mastery of the fundamentals. As such, a classical school may prove to be the best setting for EL students. Both the phonics program of *Literacy Essentials* and the conceptual nature of Singapore Math are designed to meet the individual needs of all students. Since most students will not have been taught to read or spell using an

explicit phonics method, all students in the elementary school will initially require intensive phonemic training. This includes extensive orthography practice, which could be called the science of correct spelling. The advantage of orthography is that it systematically shows how phonograms work in each word rather than depending on students to simply memorize the word or intuit “the code” of the English language itself with no instruction to that end. As has been revealed in many studies, about a third of children do not intuitively understand English spelling in the way that some of us “are just not good in math.” As such, the phonemic patterns found in the Orton-Gillingham family of research have been used for students who struggle with reading, whether having a different native language, being dyslexic, having suffered physical injury affecting the brain, or simply not having a normal grasp of English spelling.

Our phonics program is a multi-sensory approach. That is, students hear the explicit sounds of the phonograms spoken by the teacher, say the sounds themselves in a choral response, see the teacher writing the phonograms on the board to form words, continue to say the phonograms as they write the words on paper, then see their own written words, marked with a code that enables them to understand what each phonogram is doing in the word (as when the letter O says its third sound, or the letters CH say their second sound). This multi-sensory way of teaching helps all students master and commit to memory what they are learning. Thus, students hear, say, see, and write words whose spelling patterns are explained to them, thereby taking “ownership” of correct spelling.

Gifted and Talented

Classical education, by its very nature, upholds time-tested standards of excellence and is challenging and academically rigorous at its core. Students first encounter Shakespeare in the fifth grade. They first learn about Socrates in the second grade. They will start learning Greek and Latin roots in fourth grade. As such, experience shows that students deemed gifted and talented are genuinely challenged by the demands of classical learning. The classical curriculum is by its nature a gifted and talented program for all students.

Obviously, certain students will excel more than others. Should a student wish to pursue a more demanding level of instruction, the teachers will work to provide such a challenge within the curriculum itself rather than creating an alternative curriculum or program. For example, when second-grade classes are memorizing the Preamble to the Constitution, a more talented or ambitious student could “keep going” and memorize as much of the Constitution as he or she can, or perhaps attempt the Bill of Rights. In the fourth grade, the students read an adapted version of *Robinson Crusoe*. A student wishing to excel further could read Daniel Defoe’s original text, which is written in eighteenth-century prose. In the sixth grade, students encounter philosophy through their study of the Greeks and Romans, followed by the Enlightenment. Students wishing to go beyond the teacher’s lectures introducing the philosophical concepts of “the Cave,” the *vita activa* versus the *vita contemplative*, the “state of nature,” the

division of labor, and so on, could be given actual passages taken from Plato, Cicero, John Locke, Adam Smith, *et alia* to read and report on.

Needs in Mathematics

A classical school seeks to provide students with a mastery of numbers no less than a mastery of words. Realizing how and why students struggle with math shapes both our teaching and our program as we work with students of widely varying abilities.

In the same way phonics offers explicit instruction in the way words work, Singapore Math offers a conceptual approach to mathematics that explains how numbers work. The Singapore Mathematics curriculum comes originally from the country of Singapore, whose students have ranked at the top of international exams for decades (for example, as reflected in the Trends in International Mathematics and Science Study). Its design addresses one of the shortcomings of math instruction in America. Plainly, many students have trouble “seeing” exactly what numbers are and how numbers relate to each other, even when counting beyond a certain number. The Singapore program explicitly teaches students in three stages of math instruction: from the concrete to the pictorial to the abstract. Students in the early grades work with small “manipulatives” (such as popsicle sticks) that allow them to feel what numbers mean and to build number sense. Soon, they move to the pictorial, that is, symbols or bars to represent numbers as they interact, which the students may have to draw

themselves. Then they are prepared to use numbers in the abstract and understand how they relate to each other in various operations.

Use of the pictorial to represent numbers does not stop in the elementary grades, however. Particularly with fractions, and then moving into pre-algebra, students must draw on bar modeling to understand how mathematical equations actually work in concept. For example, with bar modeling students can see visually what a fourth of a half is—as it becomes one-eighth—rather than just following a rote, abstract procedure (multiply the “tops” of the fractions, multiply the “bottoms”) which does not explain why that method works conceptually.

Such a method of teaching math supports students with varying needs. Whenever a student does not understand a particular operation, the teacher can always go back to the concrete or the pictorial representation rather than just stalling on an equation that makes no sense to the student(s).

The school will also differentiate math instruction by ability grouping in all grades beyond the initial years of elementary school (K and 1). Students, particularly those entering a charter school in the first few years, will vary widely in their number sense and mathematical skills. When all students are kept at grade level, the teacher is forced to teach to an artificial middle, which usually leaves at least a third of the students bored and a third confused. After initial evaluation and review, students will be placed according to their ability levels during a common math block in the elementary grades while the upper school will offer a schedule allowing students to take their ability-levelled courses. The

purpose of ability-grouping is not to “hold students back” in math, but rather to give them a solid foundation, remove anxiety, and foster a joy in mathematical thinking. If students do not master the basic operations, then their mathematical reasoning at follow-on levels will be difficult and discouraging.

The school will explain the rationale for ability grouping to the parents and provide a culture in which students go to different teachers during “math time” but are not being demoted or put in “second-grade math” as third graders, for example. Schools that have used this approach have been able to bring students who struggle with math up to their grade level more quickly and to build students’ confidence in their own math abilities as they learn to enjoy the puzzles, patterns, and mysteries of numerical relations. NICA’s sister-school, Treasure Valley Classical Academy, has shown strong academic results (as evidenced in the most recent ISAT) in mathematics using this approach to ability grouping.

Ability grouping in math will also be the school’s approach to challenge students deemed gifted and talented in mathematics. The upper school schedule will be made to ensure classes in pre-algebra, Algebra I, and possibly geometry will be offered during the math block in the elementary school for students who need that level of instruction.

A now seminal 2007 study by Dr. Greg Duncan *et alia* of Northwestern University titled “School Readiness and Later Achievement” concluded that early literacy and math skill acquisition is the greatest predictor of later learning. By choosing sound research-based programs in phonics and mathematics, coupled

with a classical curriculum that, by definition, is a literacy focused curriculum, we propose to provide students with these skills early on to ensure a successful academic future.

PROFESSIONAL DEVELOPMENT PLAN

Professional development in the classical model will be an essential feature of NICA's annual program. Though training and evaluation is continuous, most faculty training will come in the form of book ends to the academic year held in the last week or weeks of summer prior to the start of the school year and for two or more days in the early summer at an annual retreat involving similar schools.

Professional development is essential to NICA achieving its mission. Though some teachers will have a background in classical education, whether in their own K-12 or college experience or in teaching, others will not. While elementary teachers may be very strong and well-trained in their particular academic disciplines, they may not be as well versed in the classical approach as others. Further, even within the classical education community there are different ideas concerning what is both most classical and most effective. Thus, the school's faculty training will bring together all teachers in all subjects and for all grade levels to create a common conversation about what constitutes the school's mission, vision, pedagogy, and means of promoting good student conduct and progress within a vibrant and cheerful school culture.

Within this framework, professional development will take several forms. There will be a significant amount of attention given to the mission and philosophy of NICA's American classical approach, to common features of classroom management and school decorum, and to school policies and practices, all discussed as a whole faculty. Further, teachers will participate in intensive pre-opening and follow-up training for individual subjects: phonics (*Literacy Essentials*), mathematics (*Singapore Dimensions*), grammar (*Well Ordered Language*), vocabulary (*Wordly Wise*), composition (*Institute for Excellence in Writing*), and comprehensive core curriculum (*Hillsdale K-12 Program Guide*). Elementary teachers, who teach multiple subjects, should expect to participate in annual training for phonics, grammar, mathematics, literature, history, and science. While it might seem unnecessary for an experienced teacher to sit alongside a teacher new to the school and to the curriculum (and sometimes experienced teachers will not be required to participate in the introductory phases of training), all these subjects are both rich and complex enough to warrant repeated inquiry. In addition, both the insights and questions of more experienced teachers can be very helpful to newer teachers and to their veteran colleagues.

The largely subject-based training for upper-school teachers will usually be directed only at the teachers who teach those disciplines, with two provisions. First, all teachers will be given at least an introduction to all subjects taught in the school. Knowing what other teachers are doing in other subjects builds

camaraderie, gives teachers a much broader understanding of the school, and promotes cross-curricular instruction. Second, upper-school teachers should be encouraged to attend much of the elementary training in their subject areas, again for several reasons. Doing so builds a strong alliance between upper-school and elementary teachers. It reveals to all teachers what the grade-level expectations of students are, what students will have learned in the earlier grades, and what they should prepare for in the upper grades. In other words, it fosters vertical integration of the curriculum.

Teachers (and school leaders) should practice what they preach. To this end, the faculty and staff will, over time, “read through the curriculum” together to promote summer professional development and discussion during faculty training. Rather than just talking about what “The Great Conversation” should look like, the faculty should participate in or “model” it. Such engagement will give teacher insights into what is expected of them and what they should expect of their students. Here are some examples: Benjamin Franklin’s *Autobiography*; Frederick Douglass’s *Narrative*; Laura Ingalls Wilder’s *Little Town on the Prairie*; Mark Twain, *The Adventures of Tom Sawyer* (not “the model boy” of the village, nor the model student, but like many a young boy who just might end up in your fifth-grade class).

The training detailed above will be provided and orchestrated in a variety of formats. The Hillsdale College Office of K-12 Education holds an intensive two-week curricular and pedagogical training for new member schools. This

training addresses the mission and history of classical education, the teaching of various subjects, and the overarching expectations of a classical school. This initial training is followed up with three to four days of annual training on the Hillsdale campus for teachers at the various grade levels and subjects taught (i.e. early elementary, upper elementary, upper school by subject). Further, Hillsdale curricular experts and teaching staff visit each school at least once per year to provide guidance and follow-up training.

At the annual training at Hillsdale, teachers meet and collaborate with other teachers from across the country, many of whom have been in classical schools for some time. Often the training is led by these more experienced teachers. This kind of training conducted by those who “know the ropes” is very beneficial to teachers: both in offering new ideas for best practices but also in reassuring and guiding them when some things are just hard by their very nature.

Over time, both in-house and in-state training will figure prominently in NICA’s professional development opportunities. After a while, some teachers will no doubt have distinguished themselves as masters of their craft. Such teachers are often informally consulted by their colleagues for advice about what works in the classroom. A school with outstanding teachers does well to use their talents to help lead discussions and train other teachers, particularly those new to the school and new to teaching altogether. This is also a good way to train future school leaders, whether of this school or others. These teachers will be given

opportunities to serve in two-year faculty chair terms in grade bands such as K-2, 3-4, 5-6, and upper school by subject.

Another feature of the growth of the classical schools' movement is an increasing level of collaboration among schools in the same state or region of the country. ACSI will coordinate to capitalize on collaborative opportunities within and among its schools within Idaho.

While the kinds of training needed to achieve the school's mission varies according to grade level and subject matter, certain common elements transcend age and subject. The school will work to ensure teachers have these fundamental ideas of good classical teaching on their minds as they prepare and execute their lessons. Such elements or questions are:

- How does a teacher provide teacher-led instruction that nonetheless engages the students individually and enlivens the class as a whole?
- How does a teacher employ the Socratic method? What does Socratic inquiry look like in different subjects and at different grade levels?
- How does the teacher differentiate within the classroom to engage all students?
- How do more lecture-based classes (history and science) tell the story of the human or the natural world and keep students engaged while doing so?

- How do the arts (visual and musical) appeal to certain models of excellence, and can the modern student imitate or be inspired by these models?
- How does a teacher create study questions, quiz and test questions, and essay questions that engage and do justice to the subject as they inspire the students' minds?
- How does a teacher develop memorable assignments and tests, thus producing cultural literacy, a storehouse of knowledge, and genuine, life-long participation in "The Great Conversation"?
- To what extent can/should modern technology be used in a classical school?

Aside from day-to-day student participation in class discussion, what other forms might the rhetorical component of classical education take? These should include memorizing poetry; brief statements or reports from the front of the class; class debates; mini-lectures on appropriate subjects, such as a work of art, "justifying one's answer" as in a math class, etc. A student's academic journey at NICA will culminate in a senior thesis both written and presented orally to his or her classmates, teachers, and other invited guests.

What constitutes fair and effective grading? The ideal will be a "Golden Mean" between every student easily making straight A's, on the one hand, and most of the students barely scraping by, on the other. In general, grade inflation will be discouraged, with grades assigned according to the following guidelines: A (mastery), B (proficiency), C (sufficiency or basic competence), D (insufficiency),

and F (failing). Grading is particularly important since most students will enter the school without a classical background, and the material being taught is demanding. Over time we should see greater mastery of the curriculum and therefore significant improvement in grades for all.

In addition to training, the *Hillsdale College K-12 Program* and the *Core Knowledge Foundation* have ample resources that help teachers prepare lessons and follow the sequence for any given subject or grade level. *Singapore Mathematics* and *Literacy Essentials* likewise offer such resources. Time will be provided during training to show teachers how to use these materials.

The bulk of professional development will be devoted to the curriculum and teaching. Nonetheless, sufficient time will be given to other essential topics: maintaining good discipline and decorum in the classroom; student services (effective and appropriate interventions, special education, and English language learners); differentiated instruction; effective communication with parents; school policies and procedures, and school information systems (student information system, parent portal, etc.).

Teachers will be instructed in the best techniques and school's policies and philosophy of what is usually called "classroom management." The basic strategy is to combine structured learning wherein students always know what is expected of them with engagement and discussion that keeps students interested and appeals to the best in their nature through an explicit teaching of the moral virtues (of which the school has chosen six "core virtues"). In addition, the school

will have a fair and consistent plan of discipline to correct behavior when it is not appropriate or conducive to learning. This plan will vary according to grade level so as to be age-appropriate, but will throughout the grades require students to acquire what the school will call “self-government.” Though teachers may have different “styles” or “voices” in implementing discipline, as is the case with teaching, all teachers will embrace the school’s philosophy and practices of promoting good behavior.

FACULTY AND STAFF PERFORMANCE EVALUATION

One of the school leader’s primary duties will be to clearly explain to teachers the expectations for their teaching, classroom management, various administrative responsibilities (such as taking attendance in a timely manner, grading, etc.), communication with parents, monitoring students outside the classroom, and the various aspects of school safety.

From the first week, the school leader will be a presence in the halls and in the classrooms to ensure the teachers fully understand and are following the expectations of the school: with the school leader’s understanding being that this is a first-year school, some teachers may be in their first year of teaching, and the school has a very unique mission. Thus, much “on-the-job training” is to be expected. Teachers should feel that they can go to the school leader with questions and to get help in a friendly and productive learning environment. It is the school leader’s job to promote a positive culture of self-improvement.

This culture is best created—at least in the classical community—by what is called “The Conversation.” Teachers should expect the school leader or, eventually, lead teachers to come into their classrooms, to observe, and then to discuss the lesson afterwards. Rather than a highly formal and formulaic evaluation, the school leader or lead teacher should be able to give a teacher advice for improvement as well as comment on the strengths of the lesson—with guidance on the subject itself—through a conversation that includes questions, commentary, and suggestions. Thus, the idea of a conversation which animates the school extends to the evaluation of teaching. The hope is teachers will enjoy the school leader visiting classes and look forward to such feedback rather than dreading a highly formal evaluation. Though this personal approach may seem antiquated, it is most definitely the classical approach to teaching—in this case teaching the teachers. Such observations will be frequent, such that by the end of the year (at the summative appraisal), both the teacher and the school leader will be very familiar with areas of strength and areas that are opportunity for improvement.

Teachers will receive a formal end-of-year appraisal each year, which includes an interview and a written evaluation to be kept in the teacher’s file. The school leader will follow Idaho’s approved Danielson Framework in providing written feedback for both informal observations as well as the annual summative evaluation.

In the case of substandard performance where expected improvement is not forthcoming, the school leader may reassign the teacher to other duties (if such duties exist and if there is a good chance of the teacher's improving) or terminate the teacher's at-will agreement. There are, of course, other reasons for terminating an employee, e.g., lack of professionalism, the use of inappropriate language in class, or a failure to perform assigned duties (such as getting grades in or being chronically late for class).

Members of the office staff or leadership team will be evaluated in a similar manner to teachers, though clearly a different kind of observation will take place. Whereas the faculty will meet regularly to discuss matters related to the classroom, school culture, upcoming events (such as a parents' night), and the like, the office staff will usually meet as a smaller group or individually with the school leader to discuss various administrative functions (e.g., enrollment, finances, or curriculum orders). Often the staff will need to meet prior to introducing something to the faculty. Staff members may be required to attend faculty meetings when needed. It is likely that staff will be able to meet during the school day, whereas faculty meetings will be held after school on a consistent schedule.

TEACHER RECRUITMENT

The ACSI governing board and school leadership recognize that the availability of classically trained educators is limited, and that American classical

education is an even narrower branch of the classical education movement. It is anticipated that NICA may attract a small number of experienced educators from other schools within the Hillsdale K-12 initiative who are interested in living in rural northern Idaho or are seeking opportunities for greater responsibility in an American classical school. However, NICA intends to cultivate its own American classical educators by drawing from the existing pool of new and experienced teachers in Idaho and throughout the region. These efforts will be combined with recruitment of content experts from across the nation. The common threads that will unite successful candidates are: (a) mission alignment, (b) kind-heartedness, and (c) a love of wisdom and a desire to learn. Each teacher employed by NICA will receive ongoing training in the mission, educational program, and character development practices utilized in an American classical school. Details regarding approaches to teacher professional development are provided earlier in this section. Through those efforts the school leader will create a corps of American classical educators for NICA, with assistance and support from Hillsdale College. This process is unfolding across the United States as the classical education renaissance gains momentum and schools work to form the next generation of classically trained teachers.

Sustainable, long-term recruitment strategies are a top priority for NICA and ACSI. Although our plan is to create a corps of American classical educators, we need access to mission aligned professionals with an interest in learning this model. Currently, the groundwork is being laid to create recruiting pipelines

between interested colleges and universities and ACSI schools. These include Baylor University, Hillsdale College, George Fox University, St. Johns College, Templeton Honors College (Eastern University), Torrey Honors College (Biola University), University of Dallas, and Wyoming Catholic College. These relationships are being developed by leveraging connections within the ACSI network and external support for our mission to train the minds and improve the hearts of students. This is only the beginning of our concerted effort to ensure that we can staff not only NICA, but other ACSI schools as they come online in the future.

While many of NICA sister-school's (TVCA) elementary school faculty were recruited from within Idaho, all their upper school faculty are content area experts recruited from across the United States (from New York, Virginia, Texas, Arizona, and California) and 85% of them have either a master's degree or a doctorate. NICA will pursue similar recruitment patterns, with most elementary school teacher recruitment occurring locally or regionally, combined with a national search for upper school teaching candidates. To support Idaho-based recruitment efforts, in-state pipelines will eventually be developed. However, there is strong evidence that talented educators from around the country desire to work in American classical schools and will relocate for the opportunity.

Housing could possibly be an issue in Northern Idaho with the increased costs of real estate and rent. The campus that NICA is pursuing has options for multiple staff family housing units. Further, NICA will work closely with

community leaders and members to find places to rent or purchase for teachers who want to relocate to Bonners Ferry. Often people who rent are seeking for individuals who are responsible, professional, and have a stable job and teachers are often the top of the list of those seeking renters.

ADDITIONAL INFORMATION REQUESTED BY CHARTER COMMISSION STAFF

The Charter Commission Staff requested additional information about remediation programs, the times they are conducted, and which students may participate.

The petition’s statement on page 31, which mentions that “NICA may request struggling students attend remediation programs held before or after regular school hours or during the summer,” applies to all struggling students, including those without Individualized Education Programs (IEPs), Title students, or students with a 504 plan. The request for attendance in remediation programs is not limited to any specific group of students but is open to any student facing academic difficulties.

This request for attendance in remediation programs may be initiated based on various criteria, such as teacher recommendations, test evaluations, or any other assessment methods used to identify students who are struggling academically. The intention is to provide additional support and resources to help any student who may benefit from these remediation programs, irrespective

of their specific educational designation. These support mechanisms may include after school tutoring, summer school, and other types of support that are included within the normal parameters of a school.

The Charter Commission Staff requested additional information about the remediation processes to help all students meet performance expectations.

To assess whether students in remedial/supplemental instruction meet expectations, the school will employ various methods, including benchmark MAP assessments, teacher assessments, and in-school assessments. These methods will be used to gauge the student's progress and proficiency in reading, writing, science, and mathematics.

The frequency of assessment will vary based on the type of assessment used, for example:

- a. Benchmark MAP assessments will be conducted early fall, winter, and late spring, as regular and ongoing assessments.
- b. Teacher-developed assessments will be conducted on an as-needed basis, meaning they will be administered when teachers deem it necessary to evaluate a student's progress.

For students who are unwilling or unable to continue remedial and/or supplemental instruction, the school has a procedure in place. An academic team meeting will be convened, involving school leadership, teacher(s), and parents. The purpose of this meeting will be to determine the next steps to ensure that the

student meets the academic goals. During this meeting, the team will discuss strategies and interventions to support the student's academic progress. This may include providing additional support, both at school and at home, in order to help the student meet the academic expectations. The goal is to find a solution that best addresses the individual needs and challenges of the student in question.

SECTION II: FINANCE AND FACILITIES PLAN

FISCAL PHILOSOPHY AND SPENDING PRIORITIES

NICA is a nonprofit LLC managed under the “Idaho Nonprofit Corporation Act.” Charter schools differ from other nonprofit corporations in several ways. In the case of finances and funding, charter schools are largely publicly funded but may seek and receive some funding through philanthropic sources due to the responsibility of fulfilling the obligations of public schools but on a reduced budget. Not only must the charter school choose its spending priorities carefully, but governing boards and school leaders must have a heightened sense of fiscal accountability and make wise financial choices. In alignment with this perspective, charter school boards must practice robust financial oversight of management.

NICA’s fiscal philosophy is focused on the principle that all money will be prioritized to inculcate excellent knowledge and character in our students and that budgetary decisions will be made with long-term financial sustainability in mind. Our goal is to operate with a budget that will gradually build toward a 60-day cash reserve (minimum) within the first 3-5 years of operation and always maintain at least a 1.2 debt service coverage ratio. The budget will follow a

realistic projection of future operating revenues and uses of funds. Additionally, the budget will be prepared with thoughtful consideration of the mission of our school, and state, federal, and local requirements.

NICA will make every effort to ensure timely payments of all liabilities. Also, all expenditures will be regulated to make certain that sufficient funds are available to cover all financial obligations.

NICA will operate in a transparent and accountable way in all financial matters. The school will continue to communicate with all persons, groups, or organizations that have an interest or concern related to our school. The NICA website and other media outlets will be utilized to ensure that our public financial information is easily accessible (per Idaho statute).

NICA will make every effort to pay fair and competitive wages to its employees. Compensation will be reviewed annually. This is an important tool in attracting and retaining a talented workforce.

NICA values its relationships with all vendors in our local community and throughout Idaho. NICA will routinely review fiduciary relationships to ensure the reasonableness of fees paid and that contractual requirements are being met. These relationships may include, but are not limited to attorneys, auditors, elementary or secondary special education service providers, and facility contractors.

FINANCIAL MANAGEMENT PLAN

The budget is prepared by the school leader and approved by the ACSI governing board in compliance with Idaho Code § 33-801 and policy of the State Board of Education. It will be presented at a public hearing in May (first reading) and June (second reading) of each year and is delivered to the State Department of Education as required on or before July 15th prior to the beginning of the school year. Income sources will include state allocation per pupil, federal grants, private grants, business partnerships, and philanthropic donations. Amended budgets will be submitted to the State Department of Education as necessary pursuant to Idaho Code Section § 33-701(9). As mentioned previously, NICA will build and then maintain an operational reserve, to account for any contingencies.

The accounting records will be kept in accordance with generally accepted accounting principles and standards. The purchasing process will comply with Idaho Code § 33-601. The school leader will be responsible for financial management with the daily monitoring of revenue and expenses and management of cash flow. Per ACSI's bylaws, the governing board must ensure the financial integrity of the NICA budget; therefore, the ACSI governing board exercises fiduciary oversight of the school's finances.

The partnership with Hillsdale College provides critical support in the technical areas of starting a new charter school. Many charter schools are blindsided by a host of issues that are difficult to foresee. The experience,

guidance, and rich network that the Hillsdale K-12 Program provides will be essential to NICA's success. Hillsdale College provides a semi-annual two-day training on board governance principles, including financial oversight.

Another important partnership that NICA has in the area of school finance is the team at BLUUM. Through the agreement between NICA and BLUUM, finance training and resources are provided to the governing board and school leader, particularly in the area of Idaho laws, formulas, and best practices. BLUUM's objective in providing this no-fee support is to empower financial and operational decision-making in those responsible for the development of NICA. The agreement between NICA and BLUUM can be found in Appendix Series H.

The school leader and business management service provider will be responsible for monitoring the school's financial position, i.e., the routine spending decisions, maintaining financial records, making deposits, filing payroll taxes, etc. The ACSI governing board is responsible for the oversight of the school's financial management. The board's responsibility is to ensure that all management responsibilities are properly executed, and that the school's money is reasonably safeguarded from risk.

Dr. Brian Carpenter (2011), from National Charter Schools Institute, believes the following are two of the most valuable financial oversight policies a board can have:

- An internal control policy (segregation of duties). Such a policy helps prevent any individual from having unfettered access to the

school's money. Failing to have such a policy can cost a school dearly.

- An auditor selection policy through which the board takes the lead in selecting the auditor. Among other things, the board should ensure that the auditor is independent from management.

The governing board will also consider guidance for financial management policies per the following guidelines from National Charter School Resource Center:

Financial Health and Sustainability

- Ensure financial literacy
- Proper budgeting and forecasts
- Regular monitoring practices
- Regular risk management
- Identification – using National Association of Charter School Authorizers Checklist
- Near-term measures
- Sustainability measures
- Practice a culture of fiscal accountability
- Set up policies and procedures to ensure transparency and accountability

- Practice proper procurement and contracting
- Limit access to school funds
- Review human resources policies
- Review and maintain accurate records and accounts
- Contract independent financial audits
- Protect and encourage whistleblowing
- Turn on automated controls
- Look for warning signs in financial records, such as sudden drops in profit or cash, no receipts, missing documentation, and large increases in payments or salaries.
- Look for warning signs in a school's fiscal practices, such as the concentration of authority, no transparency, unqualified financial management, no implementation of policies, weak checks and balances, and unresponsive school leadership.
- Upon initial suspicion of a financial issue, clearly document all decisions and designate the appropriate investigative body.
- Conduct a thorough investigation to understand whether the issue should be escalated, or if a crime has been committed.

Source: Carpenter, Brian, L., (2011), BoardWiser™, Navigating the Intersection of Governance and Management Series, 7 of 12. Brian L. Carpenter, Ph.D. & Associates.

DESCRIPTION OF FACILITY NEEDS

As noted in Section I of this Petition, NICA is based on an orderly, traditional, classical education format utilizing the Hillsdale K-12 curriculum. The guiding principle for most K-12 instruction is that instruction be “teacher-centered.” Most of the time teacher-centered instruction will take the form of a short lecture, story, read-aloud, or teacher-led discussion. Teacher-led discussion will help to model inquiry and analysis for students as a way of preparing them to engage in more open Socratic discussions in the upper school. This traditional instruction requires rooms with individual desks and the ability to deploy a layout that focuses attention on the teacher’s instructional location, commonly the front of the class or circulating amongst student desks. This approach can be effectively accomplished with classrooms of approximately 700 square feet. However, slightly larger classrooms of around 850-900 square feet will be necessary for the art and music programs.

Once the school is fully developed, it will serve 390 students, which includes 30 students per grade level. NICA plans to have two classrooms in grades K-1 to accommodate 15 students per class and 30 students in each classroom in 2nd through 6th and beyond.

FACILITY PLAN

With the prescribed instructional requisites from the preceding section as a guiding framework, NICA initiated an exploratory collaboration with design

partners aimed at facilitating the renovation of a facility in Bonners Ferry that used to house a large at-risk youth boarding school. This endeavor commenced by orchestrating distinct consultations with administrators, departmental leaders, and educators from other classical institutions associated with ACSI. The intent was to scrutinize the proposed design blueprints and gather innovative insights unique to the proposed campus. Subsequent to the assimilation of this information, comprehensive deliberations ensued involving various stakeholders.

In tandem with an engineer, a state inspector, fire marshal, designers, and founding group members, potential design and construction partners were actively engaged. This collective effort culminated in the formulation of multiple prospective building layouts. Throughout this intricate process, ACSI's invaluable support and guidance played a pivotal role. Their rich reservoir of experience and expertise was tapped to ensure seamless alignment of the facility plans with the American classical educational program.

The ensuing sections offer detailed insights into NICA's geographical site selection, projected budget, facility specifics, and the financial deliberations underpinning the project.

Facility Location

In September 2023, the ACSI board signed a purchase and sale agreement for the facilities that used to house the Boulder Creek Academy, a former therapeutic boarding school for at-risk youth (available for review in Appendix

Series H). The facilities are located at 378 Emerson Lane, Bonners Ferry, Idaho. The facilities are located about six miles from downtown Bonners Ferry. The current facilities will be remodeled to fulfill NICA's facility requirements. Most of the remodels will include enlarging classrooms and converting living quarters into classrooms. One building will be torn down and a larger building will be constructed that will have eight classrooms for upper grades. Many of the general facility requirements are in place such as a commercial-grade cafeteria, science lab, gathering places, administrative office spaces, and an auditorium. Although the facilities are unique in nature for a traditional school, the remodel plan will ensure that students are safe and the learning environment is conducive to learning.

Facility Needs, Cost, and Funding

Based on the proposed remodel floorplan NICA anticipates a total cost slightly under \$5,900,000. The property acquisition cost will be \$3,500,000 and the single-phase remodel just under \$2,400,000. These estimates are subject to adjustment based on economic conditions (labor and material costs) at the time of construction. Currently, NICA is planning around a cost of \$127 per square foot (total square footage is 46,550) for the purchase and remodel of the facilities. Specific financial details for the costs are included in Appendix Series B, along with site and floor plans and other relevant documents.

The facilities will provide enough space to open as a K-12 school. The total square footage of all the facilities combined is 46,550 square feet. This includes the current facilities and the construction of a new building with eight classrooms.

The list below provides a detailed outline of classroom and facility needs.

- Kindergarten 2
- First Grade 2
- Second Grade 1
- Third Grade 1
- Fourth Grade 1
- Fifth Grade 1
- Sixth Grade 1
- Seventh Grade 1.5
- Eighth Grade 1.5
- Ninth Grade 2
- Tenth Grade 2
- Eleventh Grade 2
- Twelfth Grade 2
- Main Office 1
- Student Services 1

- Resource Center 1
- Art Room 1
- Music Room 1
- Kitchen 1
- Science Lab 1
- Gymnasium 1

NICA is also prepared with a contingency plan for deployment if unanticipated factors prevent the acquisition and/or remodel facilities in advance of the opening year. The school has a contingency plan if the property and current facilities are acquired, but the school cannot afford the remodel. In this case the school will rearrange classrooms and use the facilities as they are with minimal changes during the first few years of operation until funds can be secured to make the necessary changes for the upper grades.

Facility Finance Plan

Similar to other ACSI projects, NICA plans to use a senior-subordinated debt capitalization plan for phase one financing. Building Hope and the Idaho Revolving Loan Fund would cover the subordinated debt (estimated at \$2.065M each or 35% of total project cost) and a senior lender (Umpqua Bank, Mountain West Bank, or Vectra Bank) will be utilized to secure the remaining 30% (approximately \$1.77M). It is anticipated that the total project cost will be

approximately \$5,900,000, resulting in an annual debt service cost of \$191,013 prior to a phase two refinance and transition to long-term bonds. Please note that this is based on a conservative interest rate estimate on the senior debt and that actual costs may be marginally lower.

In order to balance the budget during the initial years of operation and maintain a debt service coverage ratio of 1.2, NICA will utilize a generous grant from the J.A. and Kathryn Albertson Foundation. This grant funding will be gradually reduced throughout the early years of operation until financial sustainability is achieved. The NICA budget has been built out through the 2029-2030 school year, by which time the school will serve 390 students. Starting with that school year, NICA will possess the financial capacity to operate on state and federal funding alone and grant support will no longer be required. These funds will enable the school to operate all aspects of the educational program at full capacity beginning in year one, as reflected in the proposed budget. Support from JKAF will be gradually reduced in subsequent years until it is no longer necessary. Please note that JKAF has discontinued the practice of writing letters of support for inclusion in charter petitions because direct support is provided through Bluum. The letter of support from Bluum (see Appendix Series H), serves as a proxy for JKAF support of this project. These grant funds are available (as documented in the addendum) but cannot be fully committed until NICA is authorized by the Charter Commission.

NICA is working with banking institutions to provide financing options. In Appendix B contains letters from Umpqua Bank, Mountain West Bank and Vectra (Zions Bank) that detail their interest in working with us to finance a facility. Preliminary information about terms and conditions is provided within those documents. Please note that as with the grant support that is available through JKAF, all these relationships are contingent upon successful navigation of the authorization process. Once the Charter Commission authorizes NICA, these school financing options can be discussed in greater depth and actualized.

NICA has already begun to develop the relationships necessary to carry out a thorough and fiscally responsible facility design/remodel process. NICA has been working with the property owners, a local commercial contractor, the state building inspector, and engineers. These different entities have already completed a site walk of the facilities and due diligence work so the project can proceed on schedule once authorized. Currently, NICA plans to start the remodel process on the facility in June of 2024.

See Appendix Series A for the financial summary, pre-operational budget, operational budget, and year three cash flow statement, which reflect phase one construction costs.

ADDITIONAL INFORMATION REQUESTED BY CHARTER COMMISSION STAFF

The Charter Commission Staff requested additional information about multiple housing unit options for staff.

The multiple staff family housing options mentioned in the petition on page 67 will not be funded by NICA. Instead, NICA plans to partner with Boulder Creek Idaho Property, LLC, who has several housing options available. These housing options will be provided to staff members through this collaboration. NICA itself will not be using school funds or resources to finance these housing options. Boulder Creek Idaho Property, LLC, is a supporting partner for North Idaho Classical Academy and will seek to accommodate the school's faculty and staff housing needs with accessible lease rates. To the extent that school faculty and staff enter into lease agreements, these will be private and between the lessor and the lessee. NICA's role is to facilitate and make these options available to staff members.

The Charter Commission Staff requested additional information about JKAF discontinuing the practice of writing letters of support for charter petitions.

The petition statement suggesting that JKAF discontinued writing letters of support for charter petitions because direct support is provided through Bluum is accurate. While there is no formal documentation specifying Bluum's ultimate

authority to authorize funds on behalf of JKAF, the support provided is well-established and collaborative.

Bluum and JKAF maintain a close partnership in supporting public charter schools in Idaho. Bluum acts as an intermediary organization, ensuring that funds and resources are effectively allocated to these schools. While ultimate authority remains with JKAF, the partnership with Bluum streamlines the process and enhances the impact of support.

In addition to JKAF support, Bluum actively assists in securing federal Charter School Program (CSP) grants, which are crucial sources of funding for charter schools. This further demonstrates their commitment to the charter school community in Idaho.

Bluum collaborates with other philanthropic organizations, like the Charter School Growth Fund, to extend support to schools throughout the state. This collaborative effort reflects a collective commitment to improving education in the state. The Bluum report (see Appendix Series B) outlines the support that Bluum has provided since 2015 throughout the state.

The Charter Commission Staff requested additional updated information related to school financing options.

Included in Appendix Series B you will find updated letters of interest from banks wishing to support NICA in its financing needs. An additional financial institution has written a letter of interest, Raymond James Public

Finance Banking Division (included in Appendix Series B). These letters offer a more detailed, updated, and accurate representation of the school's financing options. These letters aim to address the specific concerns raised, ensuring that the financial information is both comprehensive and current. The school plans to build a typical "capital stack" (similar to the capital stack recently completed by Idaho Novus Classical Academy, or INCA). This "capital stack" will include subordinated lenders (Idaho Revolving Loan Fund and Building Hope) and a senior lender (please refer to the two letters of interest). As is standard practice, subordinated and senior lenders are unwilling to commit to capital financing until a charter petition has been approved. However, the process for NICA will follow very similarly to the process used with INCA.

The Charter Commission Staff requested additional information about the two facility options.

The presentation of two facility options in the petition, one being a more scaled-down version of the other, for the same facility site is acknowledged as a potential risk due to the existence of an "out-clause" as mentioned on page 151. However, this situation is being addressed in the following ways:

- a. **Execution of the Contract:** The contract for the proposed facility will be executed once the charter is approved, and necessary funding has been secured. This demonstrates a commitment to

moving forward with the chosen facility option once the charter approval process is complete.

- b. **Conditional Approval:** We foresee the possibility that our charter petition may receive conditional approval (similar to INCA), with the requirement of securing the proposed facilities and grants. This would constitute a proactive approach to address the potential risk to taxpayer dollars.
- c. **Letter of Support:** The petition includes (see Appendix Series B) a letter of support from the current owner of the proposed property. This letter expresses the continued interest and support in selling the properties to NICA. This demonstrates a positive and cooperative relationship with the property owners, which can help mitigate the risk associated with the "out-clause."

The Charter Commission Staff requested an updated mobile modular quote.

Included in Appendix Series B you will find an updated Mobile Modular quote.

SECTION III: BOARD CAPACITY AND GOVERNANCE STRUCTURE

DESCRIPTION OF GOVERNANCE STRUCTURE

NICA will be a legally and operationally independent entity (operating as a 501c-3 LLC with ACSI as the sole member), established by the nonprofit corporation's governing board. The governing board will be legally accountable for the operation of the charter school. There will be no less than 3 and no more than 11 members on the governing board. Board officers will include a president, vice president, secretary, and treasurer. Each will be elected at the annual meeting and serve for one year. See Article 6 of the ACSI Bylaws in Appendix Series C for a complete description of the officers' roles.

The president of the governing board shall preside at all meetings and shall appoint committees with approval of the governing board, shall have the right, as other members of the governing board, to make or second motions, to discuss questions, to vote, and may not act for or on behalf of the governing board without prior specific authority from the majority of the governing board to do so. It is the president's responsibility to ensure that governing board members uphold their commitments/responsibilities to the school.

The vice president shall perform the duties of the president in the absence of the president or at the request of the president. In the event a vacancy occurs in the presidency, the vice president will act in the capacity of the president until the office has been filled by a vote of the board membership.

During the foundation period of the school the treasurer may, at the request of the board, deposit or disburse the funds of the corporation or render an account of all transactions as treasurer and of the financial condition of the corporation. The treasurer shall present an operating statement and report, since the last preceding regular board meeting, to the board at all regular meetings. The treasurer shall be familiar with the fiscal affairs of the school and keep the governing board informed if the school's business management service provider is unable to so act and assist the governing board with the oversight of the corporation's financial management as well as assist the Board in the development of financial policies to ensure that performance aligns with policy. The treasurer shall not be a signor on any account nor shall have any authority to approve or authorize transactions or have responsibility for the financial performance of the school.

The secretary shall keep the minutes of the governing board meetings, ensure that all notices are given in accordance with the provisions of the governing board policies and as required by law; shall countersign, when required, all authorized bonds, contracts, deeds, leases, or other legal instruments; and perform all duties incident to the office of secretary. Other

duties may be assigned to the secretary by the governing board from time to time until a clerk of the board is hired.

The governing board may create one or more committees and appoint two members of the governing board, one to act as committee chair. Additional members of the committees need not be directors. Each committee may have two or more members, who shall serve at the pleasure of the full governing board. The provisions of the bylaws which govern meetings, action without meetings, and quorum and voting requirements of the governing board, shall apply to committees and their members as well.

ACSI commits to adhering to all federal and state laws and rules and acknowledges its responsibility for identifying essential laws and regulations and complying with them. This includes Idaho's Open Meeting and Public Records laws.

See Article 2 of the ACSI Bylaws in Appendix Series C for additional details on the membership, authority, and powers of the governing board.

See Article 4 of the ACSI Bylaws in Appendix Series C for details on the governing board meetings and open meeting laws.

THE GOVERNING BOARD

NICA shall be governed by the American Classical Schools of Idaho (ACSI) Board of Directors and managed by a school leader pursuant to the school's charter and duly adopted bylaws. The ACSI organization chart is available for

review in Appendix Series E. ACSI is a Charter Support Organization, a nonprofit external services provider created solely for the benefit of schools governed by the ACSI board. NICA (and subsequent schools) will be set up as separate LLCs with their own charters and will maintain financial independence. There will be absolutely no cross-collateralization between schools; all funding will flow directly to the schools (as outlined in the flow of funds diagram in Appendix Series E). This constitutes a wall of financial separation between the schools, each with its own revenue, financial obligations, and audit processes.

The main purpose of the governing board is to ensure that the school accomplishes the outcome for which the school was chartered within all the pertinent parameters. The governing board will be responsible for adopting policy, overseeing the management of the school, and ensuring financial compliance and responsibility. In addition, the governing board will ensure that the mission and goals of the charter are carried out by engaging in strategic planning. Governing board members will participate in fundraising activities as deemed necessary and appropriate by the board. Governing board members will put the interests of the school first and will refrain from using the position for personal or partisan gain.

The governing board will not be involved in the daily operations of the school, but will hire a school leader, who will be evaluated annually. The governing board hires an Executive Officer of ACSI to act on its behalf. The Executive Officer manages school leaders and will ensure that he/she leads NICA

in accordance with the school's mission and vision and in compliance with all state and federal laws and regulations. The governing board will also perform ongoing assessments of the school and its programs and operations, with assistance from the Executive Officer. The governing board and Executive Officer will serve as liaison between NICA and the school's authorizer.

The governing board will also routinely assess its own performance. Governing board members will participate in and develop short and long-range plans for the school(s). The governing board will monitor the effectiveness of the school's programs and implementation to see if the school has met the goals outlined in the plans.

Recommendations of new board candidates and elections of the governing board will be held in accordance with the bylaws. As new governing board members are added, each will be provided with an information packet, which contains information about the responsibilities of a board member. The packet will include, but is not limited to, governing board member roles, state statute for charter schools, ethical standards, open meeting laws, policies, financial reports, budgets, and other responsibilities. Each governing board member will have on record a signed copy of the Charter School Board Members Code of Conduct. Throughout the year, as decided by the board, there may be a training schedule including, but not limited to, the roles/responsibilities of a governing board, review of the school's charter, review of Idaho school funding and financial audits, the governing board's ethical standards, and state statutes. As

appropriate, the governing board will include other training such as the charter school board training seminars conducted at Hillsdale College. The governing board will attend the Charter School Boot Camp training offered by the Idaho State Department of Education as necessary.

THE SCHOOL LEADER

The school leader will report to the governing board at regular meetings about the school's operations and will be required to attend all governing board meetings. He/she is responsible for building a strong academic program, establishing a virtue-centered school culture, implementing the operational commitments made in the Petition, and ensuring that NICA is a high performing school. The top responsibility of the school leader will be overall instructional and cultural leadership of the charter school, including the discipline of students, and the planning, operation, and supervision of the educational program of the school. The school leader shall have the responsibility for all personnel matters including having the authority and responsibility to hire, discipline, and terminate all school employees. School employees will be periodically evaluated by the school leader in accordance with NICA policies. The school leader and governing board will work together on a periodic evaluation of the school leader's performance. Among all administrators at the school, the school leader retains primary responsibility for developing and maintaining effective community relations. The school leader shall uphold and enforce the charter, governing

board policies, and local, state, and federal laws and regulations. Additional specific responsibilities of the school leader and the school leader evaluation process are outlined in Section V of the Petition.

BUSINESS MANAGEMENT

Business management will initially be provided by a team of specialists at BLUUM, who will assist in preparing, planning for, and presenting an annual school budget to the governing board. A BLUUM representative is also expected to be available for governing board regular meetings to report on the financial status of the school and present pertinent information to the governing board as needed. The BLUUM support staff, in partnership with the ACSI Executive Officer and school leader, will also be expected to keep the governing board apprised of changes in law, regulation, and rules applicable to Idaho public school finances and to ensure that the governing board is made aware of any potential concerns about the school's finances. They will also work cooperatively with the school leader so that both can keep the governing board well informed about the school's long-term financial prospects. Meanwhile, ACSI will actively work on developing a financial management team of its own. During the last fiscal year of business management support from BLUUM, ACSI will assume responsibility for all business management functions and provide those services to NICA indefinitely.

BOARD OF DIRECTORS

The ACSI board currently has five members, who collectively bring extensive school founding and governance experience to NICA. The directors are an exceptional group of leaders with diverse professional backgrounds and experience in charter school governance, classical education, and/or character development. Additional members will be added as more American classical schools come online in Idaho. Brief biographies of the directors are provided in the subsections that follow. Their resumes can be found in Appendix Series D.

Marvin Lasnick

The board chair and a founding board member for Treasure Valley Classical Academy. Professionally, he serves as the Chief Technology Officer of Jobu Vetting, LLC, a privately held software company. He has extensive information technology experience in systems and application programming, business analytics, project and portfolio management, and cloud computing. He has led teams and projects to optimize product lifecycle management, modernize enterprise platforms, as well as to increase the pace of innovation. Mr. Lasnick also held positions responsible for global IT operations and IT compliance. Mr. Lasnick is a graduate of Boise State University with a B.A. in computer and information systems technology. He lives in Fruitland, Idaho with his wife Reegan and three of their four children.

Terry Ryan

The CEO of the Boise-based education nonprofit BLUUM and Board Chair of the Idaho Charter School Network. Ryan is responsible for leading Idaho's effort to double the number of students in Idaho high-performing public charter schools. Ryan leads Idaho's federal Charter School Program (CSP) grant of \$22 million. Ryan was Vice-President for Ohio Programs and Policy at the Thomas B. Fordham Institute/Foundation from 2001 to 2013. He began his career in education as a teacher in Poland and worked with the Polish Ministry of Education and the Foundation for Education for Democracy on education policy and civic education. In the 1990s, he served as research director for the UK-based 21st Century Learning Initiative.

Ryan also served on Idaho Governor Brad Little's "Our Kids, Idaho's Future" education task force. He is a member of the National Alliance for Public Charter Schools Policy Advisory Council. He served as a Commissioner for the CAEP Commission on Standards and Performance. Ryan was a research fellow at the Hoover Institution and was a 2008 Aspen Institute/Pahara Fellow. He has co-authored two books on education. *Ohio's Education Reform Challenges: Lessons from the Frontlines* with Chester E. Finn, Jr. and Michael Lafferty of (Palgrave Macmillan, 2010), and *The Unfinished Revolution* with John Abbott (ASCD Press, 2000).

Ruth David

The parent who originally conceptualized Idaho Novus Classical Academy, a sister-school to NICA, in Avimor, Idaho, brokered the school's land donation, and led the founding community group. Previously, she served on the board of directors for Compass Public Charter School in Meridian, where she worked extensively with parents and staff to promote school spirit and culture, to boost staff morale, and to cultivate relationships within the Compass community. She is a registered nurse by trade and spent around seven years working for St. Luke's. Mrs. David completed a B.S.N. at Boise State University and a B.A. in industrial and organizational psychology at San Jose State University. She lives in Meridian with her husband Raymon and three children.

Stacy Saylor

Mrs. Saylor is a proud board member for Treasure Valley Classical Academy and an enthusiastic supporter of the Hillsdale K-12 initiative. She lives in Payette with her husband and son along with a German Shepherd, and a Siamese cat. Her daughter is a graduate student at Idaho State in Pocatello. Mrs. Saylor, a retired bank executive, and her husband, a retired fire captain, previously homeschooled their son using the Hillsdale Academy's classical curriculum. As a family, they enjoy winter sports, hiking and exploring. Mrs. Saylor and her husband support the school's mission to train the minds and improve the hearts of students while emphasizing virtuous living, traditional

learning, and civic responsibility, and are thankful their son has been able to attend an outstanding American classical school.

John Bassetti

Mr. Bassetti brings two decades of experience in information technology to the ACSI governing board. He began as a helpdesk engineer, was subsequently promoted to IT manager, and ultimately became a director of information technology. Currently, he works as a technology auditor and organizational risk assessor. Prior to his career in IT, he worked as a geologist for an engineering consulting firm serving airline, railroad, chemical manufacturing, and multinational oil and gas clients. One of his professional interests is organizational growth and development and he has approached his role as a member of the founding community group of Idaho Novus Classical Academy with sustainable practices in mind. Mr. Bassetti holds a bachelor of arts in geology from Youngstown State University and a master of sustainable development from Macquarie University in Sydney, Australia. Having seen the positive impact that Treasure Valley Classical Academy has had on his own children, he is eager to support the growth of American classical schools in Idaho.

BOARD ADVISORS

ACSI has also sought out additional advisors to support the board. These advisors are not directors but are instead individuals selected to provide guidance

and recommendations to the board pertaining to their area(s) of expertise. Brief biographies of the current advisors are provided in the subsections that follow. Their resumes can be found alongside the board of director resumes in Appendix Series D.

Major General Mark Dillon

Mr. Dillon, a retired two-star general in the United States Air Force, brings a lifetime of leadership experience to his role as an advisor to the ACSI board. In addition to 33 years of service in the Air Force, he has extensive experience as a leadership consultant and charter school advisor and authorizer. He previously served as a commissioner on the Hawaii Public Charter School Commission and as an advisor to the leadership team of the Hillsdale College Office of K-12 Education. Mr. Dillon is an experienced mentor for school leaders, specializing in leadership, time management, business acumen, organizational culture, fundraising, and human resource management. Currently, he works as the strategic accounts manager of air and space forces for Red Hat, Inc. and operates his own education consulting firm.

Dr. Jon Fennell

Dr. Fennell is a retired professor of education, dean of social sciences, director of teacher education, and chairman of the education department at Hillsdale College. He is an expert on the philosophy of education and a

prominent voice in the classical education movement. Prior to his work at Hillsdale College, Dr. Fennell served as a consultant for management information at the Idaho Department of Education for four years then spent two decades in corporate leadership positions, eventually becoming a vice president of operations. Dr. Fennell holds a bachelor of arts in political science and a master of arts in social foundations of education from the University of California: Davis, and a doctor of philosophy in philosophy of education from the University of Illinois: Urbana.

BOARD TRAINING

One of the services provided by the Hillsdale Office of K-12 Education is training for boards. Board members will receive training related to governance, financial oversight, and procedures for board operation and meetings. This training is provided completely free of cost, and the trainers are available to answer questions or provide advice related to training topics on an ongoing basis.

LEGAL COUNSEL

The governing board will work with Chris Yorgason when legal advice is needed. Mr. Yorgason is the premiere independent attorney in Idaho on matters pertaining to charter school law and has already provided valuable advice to ACSI on a variety of topics related to the NICA project.

TRANSITION PLAN: FOUNDING COMMUNITY GROUP TO GOVERNING BOARD

NICA was conceptualized by a founding group of citizens from the desired enrollment area. The founding community group serves as the critical locus of support for generating interest in the establishment of a new school, in coordination with the ACSI board. Its role is to communicate the mission and vision to a broad array of stakeholders, generate a constituency, and foster the development of a school community. Throughout the charter school development process, the founding community group established an identity for the school (including name, logo, and school colors) and will serve as recruiters to help connect families with enrollment opportunities. ACSI will work to support the founding community group throughout this process. The five founding community group members are:

- Isaac Carey is a local real estate agent who has training and experience in social media marketing, community outreach, and investing. He attended a charter school and is interested in supporting NICA and enrolling his own children.
- Sage Dixon is a local small business owner and a member of the Idaho State House of Representatives. He has experience in start-up businesses and entities.
- Kaite Gorman is a local real estate agent with a Master of Business Administration. She has extensive experience in land acquisition

and is interested in NICA to develop the community and enroll her own children.

- Sheraya Hauck is a paralegal who helps run the operations of a local law office. She has a strong understanding of the legal system and organizing events.
- Seth Kinkaide is an entrepreneur with a Master's Degree in International Studies. He has been the key figure who started the project and is experienced in community promotion, business guidance, marketing, and fundraising.
- Lynsee Leonard is a local homemaker and educator with a Master's Degree in Early Childhood Education. She is experienced in event planning, education, and is involved with the local community groups.

The role of ACSI, through its board of directors, is to govern NICA. Once the charter is approved, the board will assume its responsibilities as a governing entity. The main purpose of the governing board is to provide oversight and ensure that the school accomplishes the outcome for which it was chartered, within all pertinent parameters. The board is not responsible for management of school operations. The school leader is responsible for working toward accomplishment of the operational, academic, and cultural objectives set for NICA. Once ACSI assumes governance of NICA, the founding community group will continue its work in support of startup efforts. After the school opens, one of the founding group members will be invited to join ACSI's board and the other

members will be given the option to join the school's Mission Support Team alongside interested parents so that they can continue to advise the school leader on matters of importance to the community.

ADDITIONAL INFORMATION REQUESTED BY CHARTER COMMISSION STAFF

The Charter Commission Staff requested additional information about the types of fundraising activities the board will be involved in.

The board's engagement in fundraising activities, as outlined on page 85, encompasses a wide array of initiatives aimed at securing essential support and resources for the organization. These efforts are multifaceted and involve various strategies, including sourcing donors, identifying individuals willing to contribute their time, expertise, and materials, as well as organizing diverse fundraising events.

Notably, the board has achieved significant success in fundraising efforts. Two major donors generously contributed \$375,000 each, while a third donor provided \$100,000. Moreover, a fourth donor contributed an impressive \$390,000, resulting in a cumulative total of \$1.24 million raised to date for ACSI. It is important to highlight that these figures exclude grants, indicating the substantial impact of the board's fundraising activities on ACSI's financial support.

Furthermore, it is worth noting that the Charter School Growth Fund (CSGF) has officially approved a substantial \$2.25 million grant in ACSI's SSO. This sizable grant signifies a significant milestone and demonstrates the confidence and support extended to ACSI by the CSGF.

Further, the NICA founding group will be involved in various fundraising activities as part of their comprehensive fundraising plan, please see the document in Appendix Series D.

SECTION IV: STUDENT DEMAND AND PRIMARY ATTENDANCE AREA

ENROLLMENT CAPACITY

NICA plans to open in the Fall of 2025 with grades K-6. One grade will be added each subsequent year as students advance. Full enrollment is forecasted as 390 students if each grade level were filled according to the selected model. Planning and budgeting were conducted based on the assumption that all seats will be filled in grades K-7, and that a minimal amount of student attrition will occur in grades 8-12, as reflected in the table below. Please note that these figures are cautious estimates, and we believe that the likelihood of consistently achieving full enrollment is high.

NICA Enrollment Expectations by Year

GRADE	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
K	30	30	30	30	30	30	30	30	30	30
1	30	30	30	30	30	30	30	30	30	30
2	30	30	30	30	30	30	30	30	30	30
3	30	30	30	30	30	30	30	30	30	30
4	30	30	30	30	30	30	30	30	30	30
5	30	30	30	30	30	30	30	30	30	30
6	30	30	30	30	30	30	30	30	30	30
7		29	29	29	29	29	29	29	29	29
8			29	29	29	29	29	29	29	29
9				29	29	29	29	29	29	29
10					28	28	28	28	28	28
11						28	28	28	28	28
12							28	28	28	28
Total	210	239	268	297	325	353	381	381	381	381

The model establishes 30 students per grade level as an operational goal. NICA will provide two sections for kindergarten and two sections for first grade. The class sizes of kindergarten and first grade will be no more than fifteen students. These smaller class sizes will provide personalized learning, enhanced

peer interactions, and academic foundation building which will support these students as they start their classical education.

For grades two through twelve, the class sizes will be no more than 30. There are several advantages to this approach. A class of 30 students is feasible to teach effectively given several key features of a good classical school: the culture is one of discipline, decorum, and order; the students are self-motivated or strongly encouraged and guided by the teacher and parents to be diligent in their studies; the teacher is focused on fostering a climate of serious academic accomplishment; and the curriculum is rich, robust, and interesting to the students.

Because of the focus of American classical education on school culture and personal development as well as the planned addition of athletics programs, an increasing availability of opportunities at NICA as the school matures, and strict attention to developing the desire of families and students to remain at NICA, the attrition rate should be expected to decrease over time. Decreased attrition rates will enable NICA to exceed the listed enrollment goals. NICA also anticipates an increasing, steady pool of students and families as the school grows in reputation and performance and proves to be an excellent educational choice.

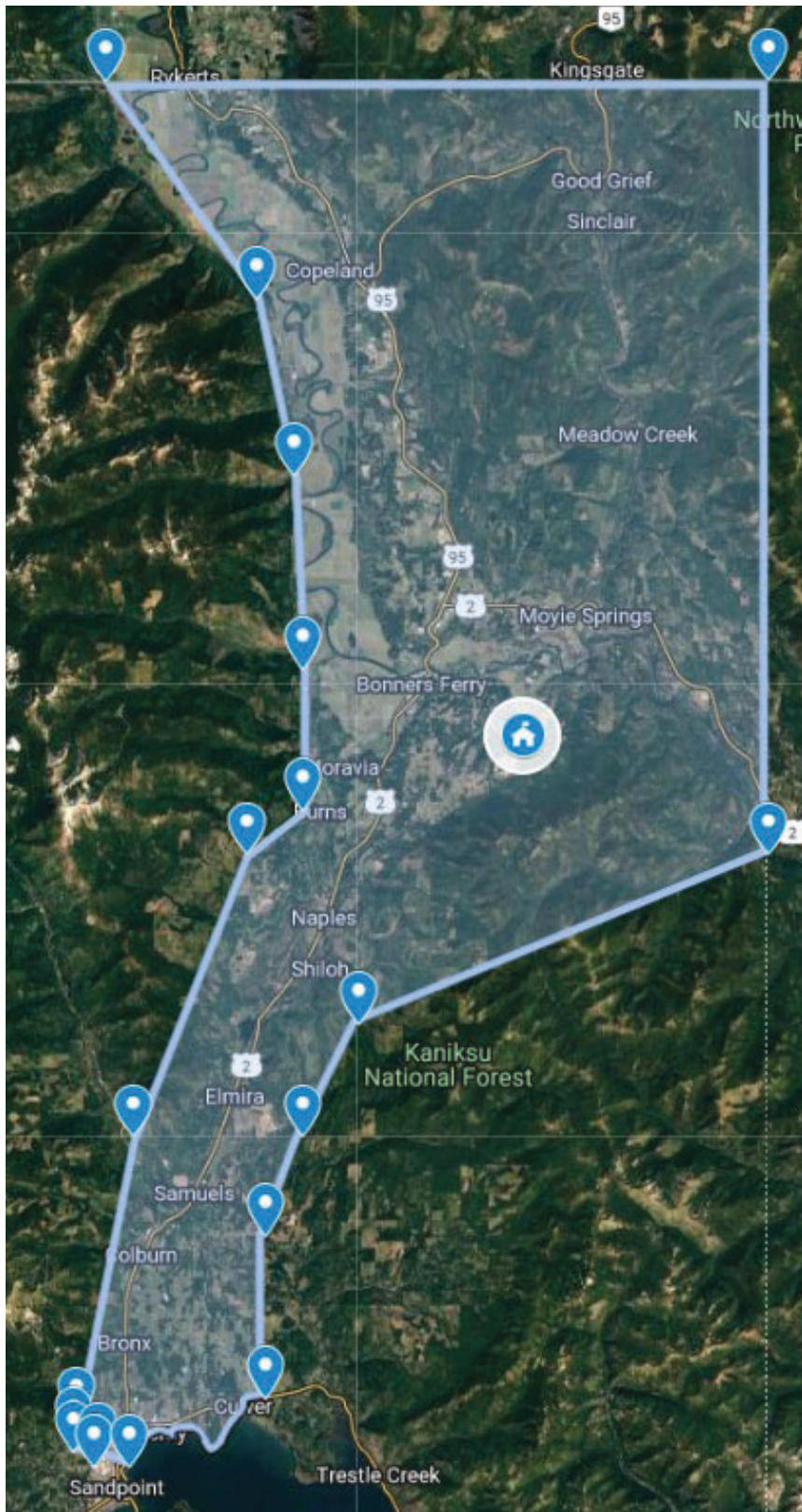
These predictions are based on the experiences of NICA's sister school, Treasure Valley Classical Academy (TVCA), which utilizes the same model in Fruitland, Idaho. Student attrition has remained remarkably low at TVCA and at the same time, their waitlist has gradually increased year after year. During the

2022-2023 school year, TVCA had a 96.9% student retention rate. One grade level transition where attrition frequently happens in charter schools is promotion from eighth grade to ninth, which is in other models the shift from middle school to high school. TVCA introduced ninth grade (the third year of upper school in our model) for the first time this year and 96.3% of their eighth-grade students remained enrolled through the transition. From its inception, student attrition has remained relatively low at TVCA. Due to their extensive waitlist, TVCA has been able to easily fill the limited number of seats that have come open since they began operating. Currently, around 233 students remain on their waitlist.

PRIMARY ATTENDANCE AREAS

The primary attendance zone for NICA is in Boundary County and the northern part of Bonner County. This area includes the communities of Bonners Ferry, Moyie Springs, Naples, Samuels, and Ponderay. This primary attendance zone crosses into the boundaries of the Boundary County and Lake Pend Oreille School Districts. The potential impact of the initial target enrollment of 210 children at NICA on these school districts is low due to the large geographic area of the primary attendance zone. In January 2023, NICA conducted a survey that included 33 families with 107 school-age children in rural North Idaho. These families expressed strong interest in a new charter school. 69% of the children are currently homeschooled (see Appendix G). Based on this survey data, and conversations between the founders and local community members, many of the intent-to-enroll submissions are from current homeschool families who do not participate in a local school district. As a result, NICA expects to have a lessened impact on local school districts. Letters and copies of the Petition were sent to the appropriate leaders on August 10th, 2023, by email. Copies of the letters are provided in Appendix Series G.

The primary attendance zone is represented on the following page was created using Google Maps. It should be noted that a high level of intentionality was applied to the selection of communities within the primary attendance zone and ultimate designation of boundaries to provide educational choice to rural families in northern Idaho.



The boundary is made up of imaginary lines created using coordinates due to the absence of major intersecting roadways on the periphery of our intended primary attendance zone. The blue location markers on the map identify coordinates that define imaginary lines in the boundary. The purpose of establishing the primary attendance zone in this manner is to ensure that all populated areas within a reasonable distance of North Idaho Classical Academy are within the zone. This will maximize access and available educational choice for families throughout the small, dispersed communities that we propose to serve. The definition of NICA's primary attendance zone is as follows:

- NICA is located in the Bonners Ferry community, six miles from downtown Bonners Ferry. The intent is for the entire Bonners Ferry and surrounding communities to be included in the primary attendance area.
- The boundaries of the primary attendance area of Boundary County begin east of the Idaho/Montana border and south of the US/Canadian border at 49.000, -116.049 and extend along the US/Canadian border until 49.000, -116.56489.
- From the US/Canadian border the primary attendance area continues east in a line to 48.88879, -116.44694, near Copeland, and continues along the points of 48.79841, -116.4181 and 48.69897, -116.41114 to include the communities along this route.

- The boundary continues to 48.62642, -116.4112 and then to 48.60406, -116.45523 to include the communities of Bonners Ferry, Moravia, and Burns.
- The boundary continues south to 48.45829, -116.543 to 48.31258, -116.58694 and then to 48.30139, -116.58955 to include the communities of Emira, Samuels, Colburn, and Bronx.
- From here the boundary follows Gooby Road for 0.8 miles.
- The boundary continues in a straight line from Gooby Road to the shore of Lake Pend Oreille at 48.28753, -116.54569 to include the area north of this line.
- The primary attendance zone then follows the shoreline until 48.32322, -116.44008 to include the communities of Ponderay, Kootenai, Boyer, and Culver.
- The boundary then follows the Colburn Culver Road for 5.84 miles to 48.40774, -116.44016 and includes the area north of this line.
- The boundary continues in a straight line to 48.5166, -116.36725 and then to the Idaho/Montana border at 48.60387, -116.04924 and includes the area east of this border.
- The boundary continues along the Idaho/Montana border until it meets up with the US/Canadian border at 49.00084, -116.049 to include the communities of Moyie Springs and Good Grief.

ADMISSIONS

NICA will abide by the admissions priorities per Idaho Code 33-5206 (11) and the lottery procedure in the case where enrollment demand is greater than the enrollment capacity at each academic year. The children of full-time staff and the children of founders shall be in the first enrollment preference category, not to exceed 10% of the total student enrollment allowed for each school year. The second enrollment preference category will include the siblings of current students. Students in the primary attendance area will be included in the third preference category.

NICA founder status will be granted at the sole discretion of the board in consideration of individual material contributions toward the establishment of the school. The minimum threshold to be considered for founder status is 100 volunteer hours dedicated toward school founding efforts. However, volunteerism alone may not constitute designation as a founder. No additional founders will be designated after January 1, 2025.

DEMOGRAPHICS

The following information is a summary of the most recent (2020) population ethnic and financial demographics of the communities that fall within the primary attendance zone. The enrollment zone will include all of Boundary County and the northern part of Bonner County. According to census.gov there are over 3,000 students under 18 years of age in Boundary County and estimated

to be over 5,000 students in the northern part of Bonner County. The area is a rural area with a large population of homeschool students.

Demographics of Communities in Primary Attendance Zone

County/City	Population	White	Hispanic	Native American	Average Income Per Resident
Boundary County	11,966	90.9%	4.6%	1.3%	\$39,204
City of Ponderay	1,224	92.2%	5.3%	1.0	\$26,590

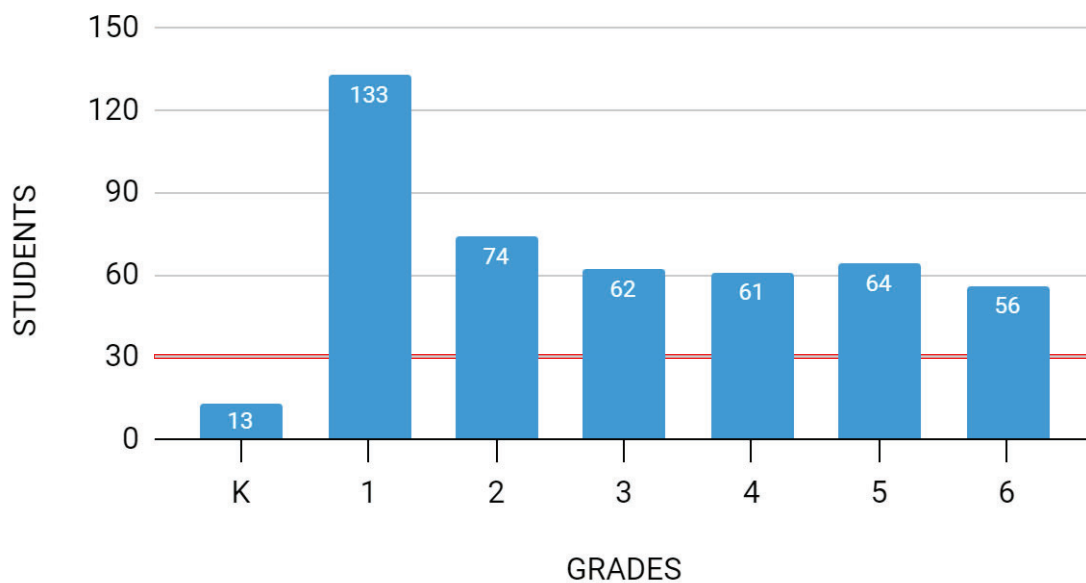
www.bestplaces.net (2020)

COMMUNITY NEEDS AND MARKET INTEREST

NICA’s first targeted digital interest survey within the planned attendance area received a high response rate. During this time an open house at the proposed facilities was held during winter break that included student-centered activities and a presentation on American classical education where over 150 people attended. Two hundred and forty-four (244) intents to enroll were received in November and December 2022 because of this event and the school’s social media campaign. This was the first sign that families in the area desire an American classical education for their children. The numbers have steadily grown and the total intents to enroll are four hundred and sixty-three (463) and growing. The founding community group has facilitated several additional information sessions since then and has established a presence at several

community events. Additionally, Facebook has been utilized for targeted marketing efforts in communities included in the primary attendance zone. These early efforts have contributed to significant interest in NICA, as displayed in the chart below.

Current Intent to Enroll Data

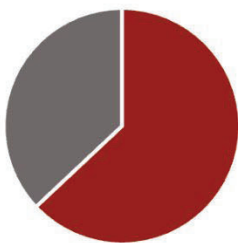


NICA has received intent to enroll documentation for a total of 463 potential students, which is well over the 210 seats that will be available at opening. Of note, the lower kindergarten enrollment figure is due to the recent change in the school's proposed opening date from 2024 to 2025. The change, which was officially announced early summer 2023, caused a requirement to shift all grade levels one year. NICA is confident that kindergarten enrollment will match the numbers in the other grades since our outreach and marketing efforts will continue over the next two years before the projected opening. In the coming

months, as we continue to reach major milestones, marketing and recruitment efforts will increase significantly to generate additional interest in our school model throughout the primary attendance zone.

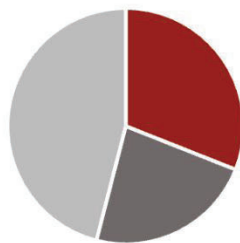
In January 2023, NICA conducted a survey that included 33 families with 107 school-age children in rural North Idaho. Of those, 69% of the children are homeschooled and 91% of respondents expressed frustration with the lack of education options (see Appendix G). 75% communicated that character formation is a fundamental expectation from a school. Poor academic performance, safety, behavioral concerns, and a lack of character formation in local schools are the primary motivations for homeschooling. All families expressed interest in new educational choices.

Educational Choice



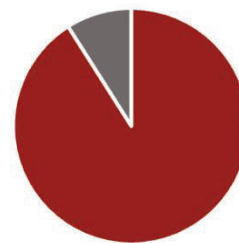
69% Homeschool

Parent Education



31% Advanced Degrees
23% Bachelor Degrees
46% Other

Satisfaction Level



91% are dissatisfied with available K-12 education options

The American classical education model selected for NICA utilizes primary source documents to provide a comprehensive K-12 civics education. Section I of the Petition provides a detailed description of the educational program. This is a

compelling aspect of American classical education for many families, and we are unaware of any other model utilized within the primary attendance zone that offers a civics education of comparable scope. Since there is no other school in the proposed attendance area that follows this model, the establishment of NICA will provide families within Boundary and Bonner Counties with expanded school choice options.

One of the primary duties of the school leader will, especially in the early years, be marketing and public education programs covering the unique educational and personal development benefits of American classical education. Founding community group members will assist the school leader with various public outreach events in all the communities in the attendance area to introduce and explain how the model, through NICA, will provide an exceptional, classically inspired, traditional education to admitted students. In addition to outreach and educational seminars, the school leader will also be engaged in a media and marketing campaign to share the curriculum and opportunities offered by NICA to underserved families in the primary attendance zone. The marketing plan will include discussions with area preschools, homeschool organizations and co-ops, as well as civic and cultural organizations.

TRANSPORTATION PLAN

Transportation to any school can be an important factor for attendance. All NICA planning and budgets include offering bus transportation to students

beginning with the first year of operation. This commitment to providing transportation is to ensure that distance will not be a barrier to attendance for disadvantaged students. Bus routes and potential localized pickup points will be determined once enrollment is finalized and modified annually as the student population grows. However, all communities within the primary attendance zone will have access to transportation services. At the appropriate time, NICA will follow the transportation bidding process per Idaho Code § 33-1510 or develop its own transportation infrastructure. It is also important to note that ACSI is currently exploring options to establish and develop a transportation system that would be shared between TVCA, NICA, and subsequent schools.

SCHOOL LUNCH PROGRAM

Nutrition is an essential part of successful learning. No one can focus on learning on an empty stomach. NICA will offer a federally compliant school lunch program. ACSI is currently exploring options to establish and develop a food service system that would be shared between TVCA, NICA, and subsequent schools. This program will be based on the successful model currently in place at TVCA. See Appendix Series H for a letter from the food services provider utilized by TVCA regarding their intent to expand the program to NICA.

Information to obtain free and reduced lunch will be gathered during the enrollment and registration process. Appropriate documentation will be collected annually to meet the program requirements. Once NICA joins the

National School Lunch Program, NICA will adopt all policies required by the program, including a wellness policy and guidelines regarding meals and snacks served at the school or school events.

STRATEGIES FOR ENROLLING UNDERSERVED FAMILIES

NICA intends to reach out to underserved families through information booths at community and local events, targeted advertising on Facebook, community, and household presentations, posting at local businesses, preschools, grocers, and banks, as well as radio and/or television advertisements. Many of these marketing methods are already underway through the efforts of the founding community group. Ongoing promotional efforts will emphasize that NICA offers a free public education that is open to all, with bussing and a nutrition program.

One of the primary reasons that NICA has chosen the proven model developed by Hillsdale College is the rich, classically informed, traditional curriculum and methodology. American classical education has the potential to provide a superb education to any child regardless of their socioeconomic or cultural background. It is an education built on a classical understanding of human nature and therefore timeless and universally applicable. There are some private schools that provide variants of classical education in the State of Idaho, but they are not universally accessible. Through the growing opportunity for school choice in Idaho and American classical charter schools specifically, every

child who is enrolled at NICA will participate in a model of education that has in recent decades been largely reserved only for those who can afford it. American classical charter schools change that dynamic and ensure that cost is not a barrier to accessing an education built on the tripart foundation of virtuous living, traditional learning, and civic responsibility. We look forward to working alongside our partners to actualize the plans for NICA and increase the availability of an excellent, tuition-free, American form of classical education in the Boundary and Bonner Counties.

ADDITIONAL INFORMATION REQUESTED BY CHARTER COMMISSION STAFF

The Charter Commission Staff requested additional information about the attrition rate of 3-7% proposed.

The attrition rate of 3-7% is low for what is normally expected for charter school students entering grades 8-12 and NICA provided this figure was for several reasons:

- a. **Local Interest:** The fact that there has been a significant local interest with nearly 500 intent to enroll submissions for 210 seats is a strong indicator. This suggests that parents and students in the area are actively choosing this charter school, which indicates a higher likelihood of commitment and lower attrition rates.

- b. **Comparative Data from TVCA:** When we examine the attrition rates at TVCA, we see that the attrition rate is around 8.3% for 9th-grade students and 7.8% for 10th-grade students. These rates are not significantly higher than the 3-7% attrition rate being proposed. It indicates that the charter school in question (NICA) is in line with the attrition rates observed in similar schools.
- c. **Budget Adjustments:** Based on detailed financial budget analysis provided by Bluum, the school has the ability to adjust expenses by 5-10% annually depending on enrollment results. NICA's financial planning demonstrates flexibility and adaptability. The ability to adjust expenses by 5-10% annually reflects the school's responsiveness to changing enrollment figures. This flexibility is vital because, in the realm of education, enrollment numbers can fluctuate from year to year. By having the capacity to modify expenses in response to these changes, NICA can ensure that its financial stability is maintained. The 5-10% range allows the school to make necessary adjustments without compromising the quality of education it provides to its students.
- d. **Conservative Budget:** Based on detailed financial budget analysis provided by Bluum, NICA's budgeting process is characterized by prudence and a conservative approach. The school recognizes the importance of fiscal responsibility and sustainability.

By adopting a conservative stance in budgeting, NICA aims to ensure that it has the financial resources necessary to provide students with a secure and conducive learning environment while being prepared for any unforeseen financial challenges that may arise. This demonstrates a commitment to the long-term success and stability of the school.

The Charter Commission Staff requested additional information about survey information from 33 families who live outside the primary attendance area.

The participation of 33 children hailing from areas outside the primary attendance region in this survey underscores a significant demand for the educational offerings at NICA. This data serves as an invaluable gauge of the community's specific educational needs.

The school will make every effort to transport students within the primary attendance zone. Parents of students residing outside of the primary attendance zone may drive their children to the nearest bus stop located within the primary attendance zone.

The Charter Commission Staff requested additional information about the intent-to-enroll survey with a large amount of families that do not provide a city of origin.

The issue highlighted regarding the absence of city of origin data in the intent to enroll survey (page 254) has been addressed by gathering and updating families' demographic information (see Appendix Series H). This updated information provides a more accurate and aligned depiction of the anticipated enrollment, as it closely corresponds with the primary attendance zone.

It is noteworthy that the mitigation of this issue was achieved by reaching out to parents who initially hesitated to disclose personal information. By proactively contacting and engaging these families, the dataset was enriched with crucial information, contributing to a more accurate representation of the families' locations and their relation to the primary attendance zone.

The Charter Commission Staff requested additional information about the number of eligible students in the primary attendance zone.

According to data from census.gov, in Boundary County, individuals under the age of 18 constitute 23.7% of the county's total population, which stands at 13,345, translating to 3,162 individuals.

Similarly, census.gov data for Bonner County reveals that those under 18 years old make up 19.4% of the county's 51,414 population, accounting for 9,974 individuals.

According to datacommons.org:

- The City of Ponderay reports 175 enrolled students, while 941 students are not enrolled.

- The City of Kootenai reports 240 enrolled students, while 872 students not enrolled.

Furthermore, as per idahoschools.org, Northside Elementary School, a local rural school in the northern part of Bonner County, serves 175 rural students spanning from kindergarten to sixth grade.

The area primarily consists of rural residences, making it challenging to accurately ascertain the number of school-aged children within the region. There is no complete data on the number of students from the small towns of Elmira, Colburn, Brox, and Samuels all located in the primary attendance zone of northern Bonner County. It is anticipated that there are many more homes and small communities that are not included in this calculation from the northern part of Bonners County.

The school's current intent-to-enroll list of 487 demonstrates robust interest in the 210 seats available at the school's projected opening.

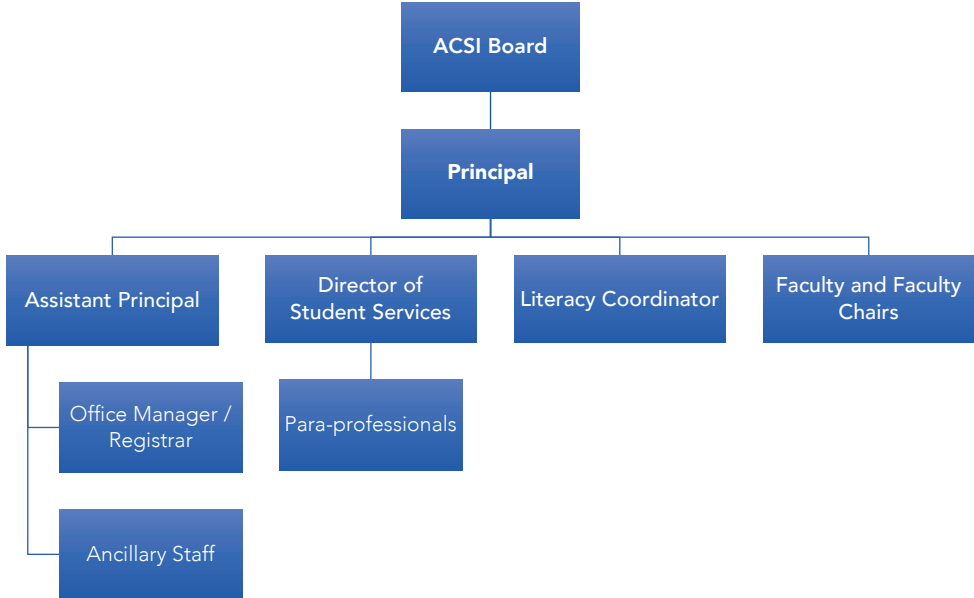
SECTION V: SCHOOL LEADERSHIP AND MANAGEMENT

LEADERSHIP TEAM

The subsections that follow provide an outline of the administrative structure upon opening as a K-6 school in addition to the anticipated structure once the school is fully developed as a K-12 school. The final administrative structure once all grades are served is subject to change, but the framework provided is a clear representation of the direction that NICA will work toward through the early years of operation.

Please note that business management will initially be provided through the partnership with BLUUM and eventually transition to a permanent support framework whereby ACSI will provide financial, accounting, and payroll services to NICA and other American classical schools.

Initial Leadership Framework (K-6)



Principal

The principal reports to the governing board at regular meetings about the school’s operations and will be required to attend all governing board meetings. The principal is charged with providing high quality leadership in all areas of school function and accomplishing the outcome for which the school was chartered. The principal serves as the head teacher of NICA and will be responsible for overall instructional leadership at the charter school, including character development efforts, and the planning, operation, and supervision of the educational program. The principal shall uphold and enforce the charter, NICA governing board policies and local, state, and federal laws and regulations. Additionally, the principal is chiefly responsible for community relationships and will establish and maintain an effective community relations program.

The principal shall have the responsibility for all personnel matters including having the authority to hire, discipline and terminate all school employees. The principal will present for board approval a proposed slate of employees at the July board meeting (in advance of the new academic year). The principal will periodically evaluate NICA employees as provided for by NICA policy. The ACSI Board of Directors will evaluate the principal. Personnel under the immediate supervision of the principal include the assistant principal, student services director education, and all teachers.

In the classical tradition, administrators at NICA are expected to preserve a direct connection to the instructional program. After the first year of operation, the principal will maintain an annual course load of one full-year course or two semester courses indefinitely. The principal will not teach a course during the first year so that their focus remains entirely on establishing the school.

Please note that the founding principal for NICA has already been selected. Dr. Jacob Francom is local resident within the proposed school's primary attendance zone and is on a fully funded Idaho school leader fellowship from BLUUM. The fellowship is designed to provide him with the time and capacity to launch NICA with fidelity to the model and to receive robust training on all aspects of charter school leadership in Idaho. Part of Dr. Francom's fellowship includes observation and collaboration at TVCA for additional training regarding how American classical education has been implemented in Idaho. Dr. Francom's resume is available for review in Appendix Series E.

Assistant Principal

The assistant principal reports to the principal. The assistant principal serves as director of operations and dean of students. The assistant principal is responsible for

student discipline, supervision of non-academic programs, facilities management, and management and supervision of ancillary staff. Routine duties of the assistant principal include enforcement of school policies and procedures for behavior, dress code, and attendance. Recurring responsibilities include overseeing and administering standardized testing, facilitating extracurricular programs including athletics, and managing the school security and emergency response plans.

The assistant principal will be evaluated by the principal. Personnel under the immediate supervision of the assistant principal include the office manager/registrar, custodians, and all ancillary services staff. The assistant principal will also be responsible for maintenance of relationships and management of contracts with external service providers (such as food service and transportation).

In the classical tradition, administrators at NICA are expected to preserve a direct connection to the instructional program. After the first year of operation, the assistant principal will maintain an annual course load of one full-year course or two semester courses.

Director of Student Services

The Director of Student Services reports to the principal. The individual employed in this position will be a teacher who is provided with release time to manage all aspects of the special education program. The anticipated percentage of release time during the first year of operation is 25%. The student services director is responsible for ensuring the integrity of the special education program. Duties associated with this position are described in detail in Section I of this Petition. However, the position is

broadly responsible for oversight and management of the special education program to ensure compliance with law and best practice in supporting students with disabilities.

The director of student services will be evaluated by the principal. Personnel under the immediate supervision of the director of student services include classified teaching assistants/paraprofessionals. The director of student services will also be responsible for maintenance of relationships and management of contracts with external special education service providers.

In the classical tradition, administrators at NICA are expected to preserve a direct connection to the instructional program. The student services director will initially spend 75% of their time supporting students in the classroom setting.

Office Manager/Registrar

The office manager/registrar reports to the assistant principal. This role includes responsibility for managing the day-to-day operations of the school office, filtering incoming workflow to the appropriate administrator, facilitating the school enrollment process, registering students for classes, tracking and validating student attendance, maintaining updated cumulative files for every student, and management of the PowerSchool information system. From time-to-time, this individual may also assist administrators with light clerical work. Importantly, the office manager/registrar will meet many students and families and is responsible for serving as a goodwill ambassador to the school community.

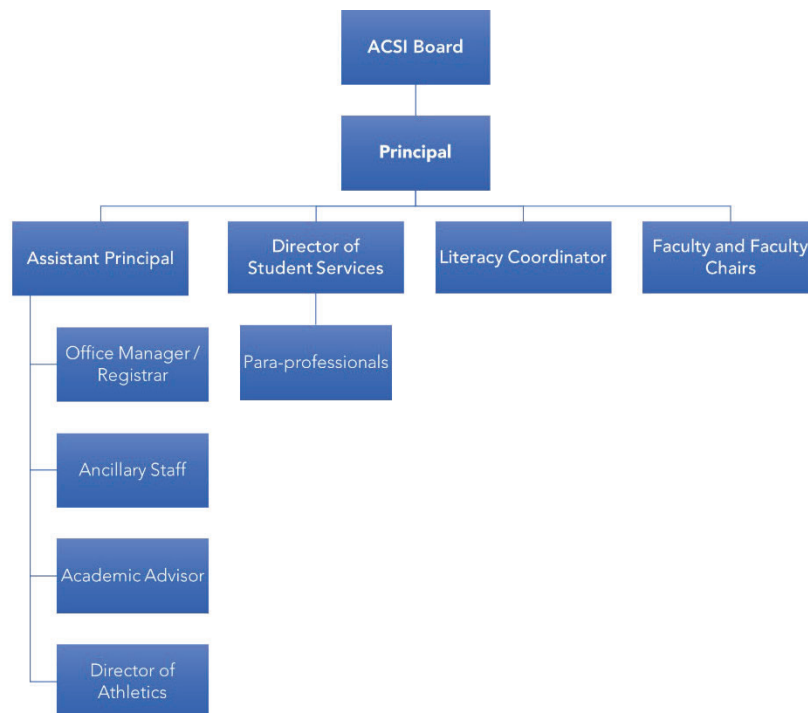
The office manager/registrar is a classified position with no instructional responsibilities.

Target Leadership Framework (K-12)

Over the first several years of operation, student enrollment at NICA is anticipated to grow rapidly. While student enrollment expands, the administrative structure of the school will change alongside it. Key changes in the administrative structure that will occur gradually between years one and seven include:

- Addition of an academic advisor to assist students with secondary planning and transition beyond graduation.
- Identification of a director of athletics to facilitate growing extracurricular programs.
- Introduction of faculty chairs to provide day-to-day support to colleagues and advise the dean of academics on curricular matters.

The organizational chart below outlines the target leadership framework as the schools moves towards grades K-12:



The subsections that follow describe the new positions included in the target leadership framework. Detailed job descriptions will be developed as positions are gradually introduced over the first seven years of operation.

Academic Advisor

This position will report to the Assistant Principal. The academic advisor will ensure that every upper school student in grades 10-12 and their family receives support planning for and pursuing their post-secondary transition goals.

The academic advisor is envisioned as a teaching position with release time to provide advisement services to students. Once the first cohort reaches tenth grade, the academic advisor position will be established and provided with 25% release time to begin building the program and develop relationships with students and their families.

Faculty Chairs

Excellent faculty will be identified to serve as leaders among their colleagues. In this capacity, they will assist the dean of academics with onboarding of new staff, serve as a resource, participate in academic decision-making processes for their designated area, and contribute curricular and instructional feedback as necessary. Possible chairs include grade bands K-2, 3-4, 5-6, and upper school.

Director of Athletics

Over the first few years of operation, extracurricular programs are expected to grow. Athletics represent a significant component of student activities and necessitates

the establishment of a role responsible for ensuring the integrity, effective implementation, and mission alignment of new and expanding programs. The director of athletics will be selected from among the faculty and provided with release time to complete duties associated with oversight of the athletics programs.

NOTE ABOUT JOB DESCRIPTIONS

NICA will maintain a job description for each position in the school. These job descriptions are subject to change as the school grows and improves over time. The school leader may reallocate the responsibilities among available personnel and create new positions as necessary. All employees—faculty, office staff, and administrators—are responsible for the education of students at NICA, which includes setting an example of high moral character and embracing the virtues of a free and just society.

BOARD OF DIRECTORS' EVALUATION OF THE SCHOOL LEADER

Throughout the school year, there will be an ongoing conversation about the progress of the school between the board of directors and the school leader. The board will inevitably have questions about how certain practices or policies are being implemented and any challenges the school faces, along with signs of success. At the end of the academic year, the board will conduct a formal evaluation of the school leader, drawing on several sources: an annual parent survey, an annual employee survey, school visits, as well as observation of faculty training, classes, standardized testing results, enrollment numbers, the school's budget, and the school leader's self-

evaluation. The Executive Officer of ACSI will facilitate this process in support of the board's evaluation of the school leader.

In order to evaluate the school leader with the mission of the school chiefly in mind, the following questions will be considered. The school leader will be required to answer these questions in a self-evaluation and given some opportunity to explain answers in a short narrative, rather than just a survey format. The Board should realize that the school leader's evaluation of teachers and staff takes the form of a conversation very much in keeping with the philosophy of the school and, further, that the start-up year is a very demanding and eventful effort wherein not everything will run smoothly.

Key Evaluation Questions

- Over the past year, did the school accomplish its mission?
- Are the teachers overall competent (preferably masters) in their disciplines, capable in their teaching and leading children, committed to the mission of the school, eager to improve, and friendly?
- Did the school leader provide adequate training of and direction to the faculty?
- Did the school leader visibly act as the academic and intellectual leader of the school, both for teachers and for students?
- Have the students made substantial academic progress over the past year?
- Have they improved in character?
- Have they participated in and enjoyed school activities outside the school day?

- Did the school leader visibly act as a leader in promoting the school's virtues and cultivating good character in the students?
- Did the school leader lead the way in shaping school culture and discipline? Is that culture and discipline evident in a simple "walk through the halls"?
- Did the school leader communicate with parents, to include supervising weekly notices of events, holding occasional talks on the mission and nature of the school, act as a presence during carpool, meetings, etc.?
- Is the school's office staff helpful, competent, and friendly? (This responsibility may be given directly to the assistant school leader, though the school leader is always accountable.)
- Does the school leader clearly support the learning of all students? (Including those with disabilities and from disadvantaged backgrounds.)
- Were various "issues" handled with an appropriate amount of prudence and care?
- Is the overall morale of the school high? That is, do students enjoy going to school and the faculty enjoy teaching?
- Is the overall parent satisfaction with the school high? Are parents largely happy with the school, re-enrolling their children for the next year, and telling others about the school?
- Has the school stayed within budget in its operations and met financial goals?
- What is the enrollment projection for the coming year?
- What is the attrition rate of students? If rather high, why?

- What is the attrition rate of faculty and staff? If higher than expected, why?

Considering these and other questions, the board's evaluation should take the form of both a written document and a discussion during the executive session of a board meeting, preferably in the summer. If, however, the board finds the school leader lacking in performance, the board will address all issues as soon as possible rather than waiting for the end of the academic year.

ADDITIONAL INFORMATION REQUESTED BY CHARTER COMMISSION STAFF

The Charter Commission Staff requested additional information about ACSI's Executive Director's role and responsibilities.

ACSI's Chief Executive Officer serves as the senior leader of the network of member schools and leads the SSO's day-to-day operations. The CEO's main responsibilities are to:

- Provide leadership and guidance for the overarching success of schools and SSO.
- Ensure adherence to ACSI's mission and vision.
- Foster a mission-aligned school member network culture.
- Oversee planning and growth for new member schools and a mission aligned SSO.
- Maintain and building stakeholder partnerships.

- Assess risks and provide mitigation strategies for member schools.
- Promote philanthropic and donor relations.

Of note, the ACSI SSO serves two primary functions: (1) to provide core support services to ACSI member schools, and (2) to support the startup of new ACSI member schools.

The Charter Commission Staff requested additional information about the school leader's evaluation tool and process.

NICA will follow the State Department of Education adopted Danielson Framework evaluation process and includes the following domains for effective evaluation:

1. Planning and Preparation
2. The Classroom Environment
3. Instruction
4. Professional Responsibilities

The evaluation process includes a robust 360-degree midyear evaluation and a detailed end-of-year summative evaluation that is backed up by survey data and is benchmarked on both the Danielson Framework as well established executive feedback frameworks.

The evaluation takes the form of a conversation signifying the interactive and developmental nature of the evaluation process. The evaluation process is an ongoing coaching process that promotes continuous growth over time focusing on targeted support for school leader.

Both the principal as well as faculty evaluations have been sampled and reviewed by the State Department of Education and have been found compliant with the state code. NICA will be using the same evaluation templates as TVCA for the principal and the faculty.

APPENDIX SERIES A: FINANCIAL PLAN

IDAHO PUBLIC CHARTER SCHOOL COMMISSION

APPENDIX A: BUDGET TEMPLATE



School Commission
te 303

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Director

This page will auto-populate as you complete the Pre-Operational and Operational Budget tabs.

Scenario:		148	210	230	268
	Pre-Operational Budget	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget
Resources	\$0.00	\$0.00	NA	NA	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	5,900,000.00	\$0.00	\$0.00	\$0.00	\$0.00
	1,287,087.00	\$643,233.00	\$643,233.00	\$495,000.00	\$267,000.00
	NA	\$357,005.00	\$450,098.00	\$568,529.00	\$693,666.00
Cost	NA	\$790,425.00	\$996,539.00	\$1,267,781.00	\$1,591,426.00
	NA	\$119,202.00	\$119,202.00	\$121,866.00	\$124,611.00
	\$0.00	\$206,000.00	\$206,000.00	\$241,481.00	\$278,906.00
	\$0.00	\$238,521.00	\$238,521.00	\$265,981.00	\$284,276.00
	NA	\$156,960.00	\$189,946.00	\$256,015.00	\$291,882.00
REVENUE TOTAL	7,187,087.00	\$2,511,346.00	\$2,843,539.00	\$3,216,653.00	\$3,531,767.00
	Pre-Operational Budget	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget
	\$241,937.00	\$1,751,768.00	\$1,914,238.00	\$2,199,065.00	\$2,413,733.00
	\$141,050.00	\$149,333.00	\$149,333.00	\$178,697.00	\$195,614.00
	\$54,100.00	\$60,050.00	\$60,050.00	\$75,650.00	\$68,750.00
	\$400,000.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$27,750.00	\$27,750.00	\$28,298.00	\$28,862.00
	\$5,900,000.00	\$234,524.00	\$234,524.00	\$240,047.00	\$241,697.00
	\$450,000.00	\$69,188.00	\$69,188.00	\$70,049.00	\$70,936.00
	\$0.00	\$206,000.00	\$206,000.00	\$241,481.00	\$278,906.00
	\$0.00	\$12,733.00	\$13,900.00	\$14,200.00	\$14,509.00
EXPENSE TOTAL	7,187,087.00	\$2,511,346.00	\$2,674,983.00	\$3,047,487.00	\$3,313,007.00
OPERATING INCOME (LOSS)	-	\$0.00	\$168,556.00	\$169,166.00	\$218,760.00
PREVIOUS YEAR CARRYOVER		-	\$0.00	\$168,556.00	\$337,722.00
NET INCOME (LOSS)	-	\$0.00	\$168,556.00	\$337,722.00	\$556,482.00

**Additional Commission
Additional Budget**

Revenues, expenditures, and Full-Time Equivalencies (FTE) anticipated during the pre-operational year. Insert rows as necessary throughout the budget to start-up costs (details, sources, etc.) in the Assumptions column.

	Budget		Assumptions / Details / Sources
		5,900,000.00	
		1,287,087.00	
REVENUE TOTAL		\$7,187,087.00	

Operating Revenues:

Expenditures

	Budget		Assumptions / Details / Sources
	FTE	Amount	
	-	-	
	-	-	
	-	-	
Full-time Teacher Subtotals	0.0	-	
	FTE	Amount	
	0.50	32,500.00	Bringing in special education director in advance of opening.
	-	-	
Special Education Subtotals	0.5	32,500.00	
	FTE	Amount	
	1.00	93,800.00	One year salary funded by JKAFF grant, or CSP grant.
	1.00	91,000.00	One year salary funded by JKAFF grant, or CSP grant.
Certified Staff Subtotals	2.0	184,800.00	
CERTIFIED STAFF TOTAL	2.5	217,300.00	

	Budget		Assumptions / Details / Sources
	FTE	Amount	
	-	-	
	-	-	
	-	-	
CERTIFIED STAFF TOTAL	0.0	-	

	Budget		Assumptions / Details / Sources
	Rate	Amount	
	11.94%	-	
	7.85%	14,137.00	
		10,500.00	
	0.00%		
BENEFITS TOTAL		24,637.00	

CLASSIFIED STAFF TOTAL	217,300.00	
STAFF & BENEFITS TOTAL	241,937.00	

Program

	Budget		Assumptions / Details / Sources
PROGRAM COSTS			
		-	
		-	
ing, HR,		-	
		-	
		-	
PROGRAM TOTAL		-	

	Budget		Assumptions / Details / Sources
		73,150.00	Based on costs at TVCA
Consumables		-	
ular Materials		-	
(e assumptions)		-	
PROGRAM TOTAL		73,150.00	

	Budget		Assumptions / Details / Sources
		28,800.00	Based on costs at TVCA
Consumables		39,100.00	Based on costs at TVCA
lar Materials		-	
(e assumptions)		-	
PROGRAM TOTAL		67,900.00	
GRAND TOTAL PROGRAM TOTAL		141,050.00	

ing Educational

Additional Budget		
	Budget	Assumptions / Details / Sources
	-	
	-	
	-	
	28,500.00	MacBook Airs for staff use
	25,600.00	Chromebooks and carts for student use
Document cameras,	-	
TECHNOLOGY TOTAL	54,100.00	
Additional Technology		

Capital Outlay		
	Budget	Assumptions / Details / Sources
	400,000.00	CSP Funds to be used to acquire furniture for school.
(salad bar, etc.)	-	
When small wares,	-	
CAPITAL OUTLAY TOTAL	400,000.00	
Additional Non-Facilities		

Additional Budget		
	Budget	Assumptions / Details / Sources
	-	
	-	
(etc.)	-	
	-	
ADDITIONAL BUDGET TOTAL	-	
Additional Board of		

consistent with facilities template)		
	Budget	Assumptions / Details / Sources
	3,500,000.00	See Facility Section.
able)	2,400,000.00	See Facility Section.
	-	
. snow removal,	-	
)	-	
y)	-	
FACILITIES TOTAL	5,900,000.00	

	Budget	Assumptions / Details / Sources
	450,000.00	CSP Funds used to acquire 3 busses, assuming \$150,000 each bus.
ld trips, etc.)	-	
	-	
SPORTATION TOTAL	\$450,000.00	

	Budget	Assumptions / Details / Sources
	-	
	-	
OTHER TOTAL	-	

	Budget	Assumptions / Details / Sources
	-	
	-	
OTHER TOTAL	-	

Commission Budgets					
	148	210	230	268	
	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
	\$0.00	\$0.00	NA	NA	
	-	-	-	-	
	-	-	-	-	
	643,233.00	643,233.00	495,000.00	267,000.00	JKAFF Support Grant, CSP Grant
	357,005.00	450,098.00	568,529.00	693,666.00	See attached M&O revenue template, all state revenues were computed based on 2023-2024 funding spreadsheets and budgeting documents provided by the Idaho State Department of Education.
	790,425.00	996,539.00	1,267,781.00	1,591,426.00	Same as above.
	119,202.00	119,202.00	121,866.00	124,611.00	Calculated as 75% of cost based on experience at Treasure Valley Classical Academy.
	206,000.00	206,000.00	241,481.00	278,906.00	Based on TVCA per-pupil revenue.
	30,000.00	30,000.00	35,167.00	40,617.00	Based on TVCA per-pupil funding levels, assuming similar student demographic mix.
	7,700.00	7,700.00	9,026.00	10,425.00	Based on TVCA per-pupil funding levels, assuming similar student demographic mix.
	-	-	10,000.00	10,000.00	Fixed amount, not available year 1.
	34,750.00	34,750.00	40,735.00	47,048.00	Based on TVCA per-pupil funding levels, assuming similar student demographic mix.
	166,071.00	166,071.00	171,053.00	176,186.00	Estimated based on TVCA's experience.
	54,760.00	77,700.00	88,430.00	99,160.00	Computed based on Idaho State Department of Education guidance document, "Special Distributions".
	-	-	-	-	
Training	6,600.00	6,600.00	6,600.00	6,600.00	
	-	-	-	-	
	-	-	-	-	
	5,083.00	7,500.00	7,500.00	7,500.00	
	-	-	-	-	
	14,440.00	14,440.00	15,820.00	16,004.00	
	-	-	4,218.00	4,524.00	
Mentors	-	-	-	9,000.00	
	35,377.00	39,306.00	41,143.00	42,980.00	
	40,700.00	44,400.00	79,200.00	91,200.00	
	-	-	-	-	
	-	-	13,104.00	14,914.00	
REVENUE TOTAL	\$2,511,346.00	\$2,843,539.00	\$3,216,653.00	\$3,531,767.00	

	Break-Even Year 1 Budget		Full Enrollment Year 1 Budget		Year 2 Budget		Year 3 Budget		Assumptions / Details / Sources
	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
	9.00	462,021.00	9.00	462,021.00	9.00	487,818.00	9.00	514,746.00	Average classroom size: 15 students per class in grades K and 1 followed by 30 students per class in all subsequent grades.
	-	-	-	-	3.00	154,914.00	3.00	177,840.00	
	6.00	272,751.00	6.00	272,751.00	6.00	287,566.00	6.00	303,023.00	
Teacher Subtotals	15.00	734,772.00	15.00	734,772.00	18.00	930,298.00	18.00	995,609.00	
	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
	1.00	65,000.00	1.00	65,000.00	1.00	66,950.00	1.00	68,959.00	
	-	-	-	-	-	-	0.40	20,000.00	
Education Subtotals	1.00	65,000.00	1.00	65,000.00	1.00	66,950.00	1.40	88,959.00	Anticipated % Special Education Students: 10%
	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
	1.00	96,614.00	1.00	96,614.00	1.00	99,512.00	1.00	102,497.00	
	-	-	1.00	93,730.00	1.00	96,542.00	1.00	99,438.00	
Staff Subtotals	1.00	96,614.00	2.00	190,344.00	2.00	196,054.00	2.00	201,935.00	
ED STAFF TOTAL	17.00	896,386.00	18.00	\$990,116.00	21.00	\$1,193,302.00	21.40	\$1,286,503.00	

	Break-Even Year 1 Budget		Full Enrollment Year 1 Budget		Year 2 Budget		Year 3 Budget		Assumptions / Details / Sources
	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
	1.00	12,920.00	3.00	38,760.00	3.00	39,924.00	6.00	89,001.00	
	7.00	136,952.00	7.00	136,952.00	7.00	141,061.00	7.00	145,294.00	
	2.00	25,840.00	2.00	25,840.00	2.00	26,616.00	2.00	27,414.00	
	4.00	113,438.00	4.00	113,438.00	4.00	116,841.00	4.00	119,910.00	
	2.00	70,720.00	2.00	70,720.00	2.00	72,841.00	2.00	75,026.00	
	4.00	53,314.00	4.00	53,314.00	4.00	54,912.00	4.00	56,559.00	
ED STAFF TOTAL	20.00	413,184.00	22.00	439,024.00	22.00	452,195.00	25.00	513,204.00	

	Break-Even Year 1 Budget		Full Enrollment Year 1 Budget		Year 2 Budget		Year 3 Budget		Assumptions / Details / Sources
	Rate	Amount	Rate	Amount	Rate	Amount	Rate	Amount	
	15.04%	158,485.00	17.38%	172,738.00	17.38%	198,527.00	17.38%	216,909.00	PERSI Rates as disclosed by PERSI for future years.
	7.85%	101,713.00	7.85%	110,860.00	7.85%	127,411.00	7.85%	139,207.00	6.2% FICA, 1.45% Medicare, .2% Work Comp
	\$ 6,500	182,000.00	\$6,500	201,500.00	\$ 6,695	227,630.00	\$6,896	257,910.00	\$6500 per FTE based on Current TVCA plan +10%, 3% increments following years
	0.00%								Suspended for multiple years by PERSI
ED STAFF TOTAL		442,198.00		485,098.00		553,568.00		614,026.00	
ED STAFF TOTAL	37	\$1,309,570.00	40	\$1,429,140.00	43	\$1,645,497.00	46	\$1,799,707.00	
ED STAFF TOTAL		\$1,751,768.00		\$1,914,238.00		\$2,199,065.00		\$2,413,733.00	

ITEMS	Break-Even Budget	Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
		38,700.00	38,700.00	40,356.00	42,095.00	Local training and conference travel costs
		-	-	-	-	Types of anticipated SPED Contractors:
		2,000.00	2,000.00	2,000.00	2,000.00	ISBA, Chamber of Commerce, etc.
		8,000.00	8,000.00	9,000.00	10,000.00	
HR,		-	-	-	-	
		1,500.00	1,500.00	1,500.00	1,500.00	Advertising and outreach tools
		11,000.00	11,000.00	11,000.00	11,000.00	Hardware, Software, Physical Supplies (e.g. ink, paper, etc.)
PROGRAM TOTAL		61,200.00	61,200.00	63,856.00	66,595.00	

	Break-Even Budget	Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
		15,593.00	15,593.00	18,279.00	21,112.00	Based on costs at TVCA
Supplies		9,900.00	9,900.00	57,727.00	65,399.00	Based on costs at TVCA
Materials		-	-	-	-	
(assumptions)		5,000.00	5,000.00	5,090.00	5,183.00	
PROGRAM TOTAL		30,493.00	30,493.00	81,096.00	91,694.00	

	Break-Even Budget	Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
		24,640.00	24,640.00	21,505.00	24,838.00	Based on costs at TVCA
Supplies		33,000.00	33,000.00	12,240.00	12,487.00	Based on costs at TVCA
Materials		-	-	-	-	
(assumptions)		-	-	-	-	
PROGRAM TOTAL		57,640.00	57,640.00	33,745.00	37,325.00	
PROGRAM TOTAL		149,333.00	149,333.00	178,697.00	195,614.00	

educational

	Break-Even Budget	Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
		18,500.00	18,500.00	18,500.00	18,500.00	Based on costs at TVCA
		12,180.00	12,180.00	12,180.00	12,180.00	Include details.
		23,320.00	23,320.00	23,320.00	23,320.00	PowerSchool, et cetera
		-	-	6,900.00	-	MacBook Airs for staff use
		-	-	8,700.00	8,700.00	Chromebooks and carts for student use
		2,000.00	2,000.00	2,000.00	2,000.00	2M Subscription
nt cameras,		4,050.00	4,050.00	4,050.00	4,050.00	Apple TVs for wireless projection
TECHNOLOGY TOTAL		60,050.00	60,050.00	75,650.00	68,750.00	

Outlay						
	Break-Even Budget	Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
		-	-	-	-	
bar, etc.)		-	-	-	-	To be incorporated into facility build and financing budget.
small wares,		-	-	-	-	
OUTLAY TOTAL		-	-	-	-	

	Break-Even Budget	Year 1	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
		-	-	-	-	Available free of cost through partnerships
		2,500.00	2,500.00	2,500.00	2,500.00	Based on costs at TVCA
		8,250.00	8,250.00	8,498.00	8,753.00	Based on costs at TVCA
		10,000.00	10,000.00	10,300.00	10,609.00	Based on costs at TVCA
		7,000.00	7,000.00	7,000.00	7,000.00	Based on costs at TVCA
FACTORS TOTALS		27,750.00	27,750.00	28,298.00	28,862.00	

	Break-Even Budget	Year 1	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
		191,013.00	191,013.00	191,013.00	191,013.00	Debt service on phase one (30,350 sq. ft. x \$285/sq. ft.)
		5,500.00	5,500.00	5,665.00	5,835.00	Based on costs at TVCA
		-	-	4,218.00	4,524.00	Visitor screening and access control hardware/software
ew removal;		7,260.00	7,260.00	7,478.00	7,702.00	Based on costs at TVCA
		25,526.00	25,526.00	26,291.00	27,080.00	Based on costs at TVCA
		4,675.00	4,675.00	4,815.00	4,959.00	Based on costs at TVCA
		550.00	550.00	567.00	584.00	Based on costs at TVCA
FACILITIES TOTAL		234,524.00	234,524.00	240,047.00	241,697.00	

	Break-Even Budget	Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
		69,188.00	69,188.00	70,049.00	70,936.00	All maintenance, operations, and administrative costs associated with providing transportation via four school buses
(s, etc.)		-	-	-	-	
		-	-	-	-	
TRANSPORTATION TOTAL		\$69,188.00	\$69,188.00	\$70,049.00	\$70,936.00	

	Break-Even Budget	Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
		206,000.00	206,000.00	241,481.00	278,906.00	Based on costs at TVCA
		-	-	-	-	
TRANSPORTATION TOTAL		206,000.00	206,000.00	241,481.00	278,906.00	

	Break-Even Budget	Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
		8,833.00	10,000.00	10,300.00	10,609.00	
		3,000.00	3,000.00	3,000.00	3,000.00	Based on costs at TVCA
		900.00	900.00	900.00	900.00	Based on costs at TVCA
OTHER TOTAL		12,733.00	13,900.00	14,200.00	14,509.00	

									July 15 Foundation Pmt, July/August Contract Payments	
NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	Total	JULY	AUGUST
							\$0.00	\$0.00		
							\$0.00	\$0.00		
							\$0.00	\$643,233.00		
\$90,019.60			\$81,017.64			\$36,007.84	\$0.00	\$432,094.08	\$18,003.92	
\$199,307.80			\$179,377.02			\$79,723.12	\$0.00	\$956,677.44	\$39,861.56	
\$23,840.40			\$21,456.36			\$9,536.16	\$0.00	\$114,433.92	\$4,768.08	
\$22,888.89	\$22,888.89	\$22,888.89	\$22,888.89	\$22,888.89	\$22,888.89	\$22,888.89	\$22,888.89	\$206,000.00		
\$26,502.33	\$26,502.33	\$26,502.33	\$26,502.33	\$26,502.33	\$26,502.33	\$26,502.33	\$26,502.33	\$238,521.00		
44,400.00			\$48,996.80			\$96,549.20		\$189,946.00		
\$406,959.02	\$49,391.22	\$49,391.22	\$380,239.04	\$49,391.22	\$49,391.22	\$271,207.54	\$49,391.22	\$2,780,905.44	\$62,633.56	\$0.00
\$159,519.83	\$159,519.83	\$159,519.83	\$159,519.83	\$159,519.83	\$159,519.83	\$159,519.83	\$159,519.83	\$1,595,198.33	\$159,519.83	\$159,519.83
\$14,933.30	\$14,933.30	\$14,933.30	\$14,933.30	\$14,933.30	\$14,933.30	\$14,933.30	\$14,933.30	\$149,333.00		
\$1,005.00	\$1,005.00	\$1,005.00	\$1,005.00	\$1,005.00	\$1,005.00	\$1,005.00	\$1,005.00	\$60,050.00		
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		
\$275.00	\$275.00	\$275.00	\$275.00	\$275.00	\$275.00	\$275.00	\$275.00	\$27,750.00		
\$ 41,828.52	\$3,625.92	\$3,625.92	\$ 41,828.52	\$3,625.92	\$3,625.92	\$ 22,727.22	\$3,625.92	\$234,524.00		
\$6,918.80	\$6,918.80	\$6,918.80	\$6,918.80	\$6,918.80	\$6,918.80	\$6,918.80	\$6,918.80	\$69,188.00		
\$20,600.00	\$20,600.00	\$20,600.00	\$20,600.00	\$20,600.00	\$20,600.00	\$20,600.00	\$20,600.00	\$206,000.00		
\$1,390.00	\$1,390.00	\$1,390.00	\$1,390.00	\$1,390.00	\$1,390.00	\$1,390.00	\$1,390.00	\$13,900.00		
\$246,470.45	\$208,267.85	\$208,267.85	\$246,470.45	\$208,267.85	\$208,267.85	\$227,369.15	\$208,267.85	\$2,355,943.33	\$159,519.83	\$159,519.83
\$160,488.57	(\$158,876.63)	(\$158,876.63)	\$133,768.59	(\$158,876.63)	(\$158,876.63)	\$43,838.39	(\$158,876.63)	\$424,962.11	(\$96,886.27)	(\$159,519.83)
\$881,249.69	\$1,041,738.26	\$882,861.63	\$723,985.01	\$857,753.60	\$698,876.97	\$540,000.34	\$583,838.73	\$424,962.11	\$424,962.11	\$328,075.83
\$1,041,738.26	\$882,861.63	\$723,985.01	\$857,753.60	\$698,876.97	\$540,000.34	\$583,838.73	\$424,962.11	\$424,962.11	\$328,075.83	\$168,556.00

**2025 - 2026 BUDGET WORKSHEETS
ESTIMATING M & O STATE SUPPORT REVENUE**

District/Charter Name: **North Idaho Classical Academy**

District/Charter Number: **n/a**

- 1. Best 28 Weeks Support Units - 2025-2026 **8.13**
- 2. State Distribution Factor - Per Unit - 2025-2026 **\$ 43,912 ***
- 3. Discretionary (line 1 x line 2) **\$ 357,005**

4. Salary Apportionment: Midterm Support Units **8.13**
(From SBA Template)

Administrative Index	Average Instructional Salary	Average Pupil Services Salary
1.41985	\$55,275.00	\$55,275.00

Total SBA plus Allowances from SBA Template	\$660,946
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Rev Code

- 5. Estimated Base Support (line 3 + line 4) **\$1,017,951** 431100
- 6. Benefit Apportionment **\$129,479** 431800
- 7. Border Contracts **\$0** 431500
- 8. Exceptional Child Support (not common) **\$0** 431400
- 9. Tuition Equivalency **\$0** 431600
- 10. Transportation Allowance **\$ 119,202.00** 431200
- 11. Prior Year Adjustments (not common) **\$0**
- 12. **Total Estimated State Support** **\$1,266,632**
(lines 5+6+7+8+9+10+11)

Revenue in Lieu of Taxes:
(n/a for Charter Schools)

- 13. Agricultural Equipment Tax Replacement Money from State Tax Commission **\$0**
- 14. Personal Property Tax Replacement Money from State Tax Commission **\$0**
- 15. **Total Revenue in Lieu of Taxes** **\$0** 438000

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* Of this amount, \$19,698 per support unit is to be used to offset the cost of health, vision, and dental benefits or insurance offered to school employees and \$16,226 per support unit is to be used as discretionary (HB797, 2022 Legislative Session).

**2026 - 2027 BUDGET WORKSHEETS
ESTIMATING M & O STATE SUPPORT REVENUE**

District/Charter Name: **North Idaho Classical Academy**

District/Charter Number: **n/a**

- 1. Best 28 Weeks Support Units - 2026-2027 10.25
- 2. State Distribution Factor - Per Unit - 2026-2027 \$ 43,912 *
- 3. Discretionary (line 1 x line 2) \$ 450,098

4. Salary Apportionment: Midterm Support Units 10.25
(From SBA Template)

Administrative Index	Average Instructional Salary	Average Pupil Services Salary
1.41985	\$55,275.00	\$55,275.00

Total SBA plus Allowances from SBA Template
\$833,296

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- 5. Estimated Base Support (line 3 + line 4) \$1,283,394 431100
- 6. Benefit Apportionment \$163,243 431800
- 7. Border Contracts \$0 431500
- 8. Exceptional Child Support (not common) \$0 431400
- 9. Tuition Equivalency \$0 431600
- 10. Transportation Allowance \$ 119,202.00 431200
- 11. Prior Year Adjustments (not common) \$0
- 12. Total Estimated State Support** **\$1,565,839**
(lines 5+6+7+8+9+10+11)

Revenue in Lieu of Taxes:
(n/a for Charter Schools)

- 13. Agricultural Equipment Tax Replacement Money from State Tax Commission
- 14. Personal Property Tax Replacement Money from State Tax Commission
- 15. Total Revenue in Lieu of Taxes** **\$0** 438000

RETURN THIS PAGE TO PUBLIC SCHOOL FINANCE, STATE DEPARTMENT OF EDUCATION

* Of this amount, \$19,698 per support unit is to be used to offset the cost of health, vision, and dental benefits or insurance offered to school employees and \$16,226 per support unit is to be used as discretionary (HB797, 2022 Legislative Session).

**2027 - 2028 BUDGET WORKSHEETS
ESTIMATING M & O STATE SUPPORT REVENUE**

District/Charter Name: **North Idaho Classical Academy**

District/Charter Number: **n/a**

- 1. Best 28 Weeks Support Units - 2027-2028 **12.57**
- 2. State Distribution Factor - Per Unit - 2027-2028 **\$ 45,229 ***
- 3. Discretionary (line 1 x line 2) **\$ 568,529**

4. Salary Apportionment: Midterm Support Units **12.57**
(From SBA Template)

Administrative Index	Average Instructional Salary	Average Pupil Services Salary
1.47310	\$57,478.82	\$57,478.82

Total SBA plus Allowances from SBA Template	\$1,060,106
---	--------------------

Rev Code

- 5. Estimated Base Support (line 3 + line 4) **\$1,628,635** 431100
- 6. Benefit Apportionment **\$207,675** 431800
- 7. Border Contracts **\$0** 431500
- 8. Exceptional Child Support (not common) **\$0** 431400
- 9. Tuition Equivalency **\$0** 431600
- 10. Transportation Allowance **\$ 121,866.00** 431200
- 11. Prior Year Adjustments (not common) **\$0**
- 12. Total Estimated State Support** **\$1,958,176**
(lines 5+6+7+8+9+10+11)

Revenue in Lieu of Taxes:
(n/a for Charter Schools)

- 13. Agricultural Equipment Tax Replacement Money from State Tax Commission
- 14. Personal Property Tax Replacement Money from State Tax Commission
- 15. Total Revenue in Lieu of Taxes** **\$0** 438000

RETURN THIS PAGE TO PUBLIC SCHOOL FINANCE, STATE DEPARTMENT OF EDUCATION

* Of this amount, \$19,698 per support unit is to be used to offset the cost of health, vision, and dental benefits or insurance offered to school employees and \$16,226 per support unit is to be used as discretionary (HB797, 2022 Legislative Session).

APPENDIX SERIES B: FACILITY PLAN

IDAHO PUBLIC CHARTER SCHOOL COMMISSION

PETITION FACILITY OPTIONS TEMPLATE



Idaho Public Charter School Commission
304 North 8th Street, Room 242
Boise, Idaho 83702

Phone: (208) 332-1561
chartercommission.idaho.gov

Alan Reed, Chairman
Alex Adams, Interim Director

Facility Option 1

378 Emerson Ln, Bonners Ferry, ID 83805					
Anticipate Move-In Date	6/1/2024	Facility Type	Existing Building Remodel	Facility Status	Confirmed (documentation in Appendix F)
Please indicate if this option is reflected as an expenditure in the budget template. Note: A facility option may be true for only your first year with a different option in subsequent years, or a scaled-down option may be presented in the break-even budget only. Sometimes a facility option is presented as evidence that the petitioners have explored multiple facilities, but only one plan is reflected in the budget.				Year 1-3 Budgets	
Company Name:		Boulder Creek Idaho Property			
Physical Address of Home Office:		378 Emerson Ln, Bonners Ferry, ID 83805			
Website Address:					
Company Contact:		Adam Ware			
Company Contact Phone Number:		360 333 7577			

Information - Facility Option 1

... sale agreement to acquire the land and facilities located on 13.4 acres at 378 Emerson Ln, Bonners Ferry, ID 83805. ... an at-risk youth facility for the past two decades. One year ago the owners purchased the property and facilities ... that owned it and ran the at-risk youth facility. NICA has been in communication with the owners for a year to ... and facilities.

... ts the costs of purchasing and remodeling the facilities to accommodate grades K-12. Based on the proposed ... NICA anticipates a total cost slightly under \$5,900,000. The property acquisition cost will be \$3,500,000 and the ... n just under \$2,400,000. These estimates are subject to adjustment based on economic conditions (labor and material ... onstruction.

... he location are accessible at <https://bouldercreekidahoproperty.com/>

... epared through a single phase plan including:
 ... ermitting.
 ... ework of road and walkways.
 ... pgrades of thirteen classrooms.
 ... pgrades of a resource center.

- Remodel and upgrades of the main office.
- Remodel and upgrades of eight bathrooms.
- Miscellaneous
 - Accessibility upgrades
 - Fire systems maintenances/upgrades
 - Data systems maintenance/upgrades
 - Water system maintenance/upgrades
 - Sewer system maintenance/upgrades
 - Fencing, gate and play equipment
- Construction of an eight-classroom and three-bathroom building.

Facility Option 1 - Details

Please describe the costs involved with this option and the structure of any arrangements the school has made (or intends to make) to secure and sustain this facility option. Adjust descriptions and add columns as necessary.

Description of Start-Up Costs	Cost Estimate (Refer to appropriate documentation in Attachments)	Responsible Party (Board or Other)
Buildings and land purchase	\$3,500,000	NICA
Planning and permitting	\$35,000	Yoder Community Schools
Sitework/earthwork	\$165,560	Yoder Community Schools
Remodel and upgrades	\$1,735,550	Yoder Community Schools
Miscellaneous	\$238,000	Yoder Community Schools
10% Contingency	\$217,411	Yoder Community Schools
Total One-Time Costs	\$5,891,521 (all inclusive)	
Description of Lease/Rent/Purchase Plan	Details (Refer to appropriate documentation in Attachments)	
Annual Lease / Rent / Mortgage Payment	\$191,013	
Loan term	5 years, payments based on 35-year amortization (35% of anticipated facility cost)	5 years, payments based on 35-year amortization (35% of anticipated facility cost)
Interest rate	3.24% (blended rate)	6.0% (service rate)
Rate escalator (if applicable, please describe)	None	None
In which operating year does the school intend to purchase (if option to purchase is applicable)	Operating Year 0	Operating Year 0
Capitalization rate at purchase (if applicable)	None	None

New Charter Petition Facility Option 2

Location Address	378 Emerson Ln, Bonners Ferry, ID 83805				
Facility Information	Anticipate Move-In Date	6/1/2024	Facility Type	New Construction	Facility Status
Budget Location	Please indicate if this option is reflected in the Budget Template (Attachment A1-A4)			Not Reflected in Budget	
Vendor/ Developer/ Contractor Information (if applicable)	Company Name:	Boulder Creek Idaho Property			
	Physical Address of Home Office:	378 Emerson Ln, Bonners Ferry, ID 83805			
	Website Address:				
	Company Contact:	Adam Ware			
	Company Contact Phone Number:	360 333 7577			

Additional Information - Facility Option 2

ACSI has a purchase and sale agreement to acquire the land and facilities located on 13.4 acres at 378 Emerson Ln, Bonners Ferry, ID 83805. Facility Option 2 is a contingency plan for use if unanticipated factors prevent the remodel of all current facilities and the eight-classroom building in advance of the 2025-2026 school year.

The contingency plan involves a remodel of the main George Washington Building, which provides a starting point for the remodel of other facilities in the future. The Washington building needs few improvements and already includes a main office, multiple standard classrooms, a science lab, an auditorium (the music room), and three additional offices for administration and support. Other facility needs would be satisfied through the purchase of three modular classroom units (each containing two classrooms) with one additional modular unit added per year in year four.

Facility Option 2 - Details

The three modular units cost approximately \$255,000 each to fully deliver and install, including all professional services, utilities, permits, fees).

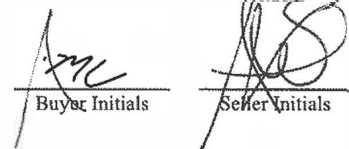
Description of Start-Up Costs	Cost Estimate (Refer to appropriate documentation in Attachments)	Responsible Party (Board of Trustees)
Buildings and land purchase	\$3,500,000	NICA
Planning and permitting	\$35,000	Yoder Construction
Sitework/earthwork	\$165,560	Yoder Construction
Remodel and updating (Washington Building)	\$47,460	Yoder Construction

Modular Classroom Units (3 @ \$255,000 ea.)	\$765,000	Mobile Mo
Modular classroom set up fees (3 @ \$22,700 ea.)	\$68,100	Mobile Mo
Modular Utility Hookups, professional services (Additional modulars in year 4 = \$255,000)	\$108,350	Yoder Con
Total One-Time Costs	\$4,689,470	
Description of Lease/Rent/Purchase Plan	Details (Refer to appropriate documentation in Attachments)	
Annual Lease / Rent / Mortgage Payment	\$152,040	
Lease term	5 years, payments based on 35-year amortization (35% of anticipated facility cost)	5 years, p 35-year a anticipat
Interest rate	3.24% (blended rate)	6.0% (sen
Rate escalator (if applicable, please describe)	None	
In which operating year does the school intend to purchase (if option to purchase is applicable)	Operating Year 0	Operatin
Capitalization rate at purchase (if applicable)	None	None
Other	N/A	N/A

NICA- Modulares Project	Notes	Cost
Civil Engineer & Landscape Design		\$ 5,000.00
Predevelopment Services		\$ 10,000.00
Testing and Surveying		\$ 5,000.00
Misc. Constr Permits		\$ 1,000.00
Fencing	Chain link fencing	\$ 55,000.00
Site Utilities	Water and Sewer Hook-ups	\$ 5,000.00
Site Electrical	Onsite Power to Modulares	\$ 10,000.00
Fire Alarm		\$ 7,500.00
Subtotal - Construction Cost Budget		\$ 98,500.00
Contingency 10%		\$ 9,850.00
Total - Construction Costs and Fees		\$ 108,350.00

**Purchase and Sale Agreement
September 11, 2023**

1. Pursuant to this Purchase and Sale Agreement (this "Purchase Agreement"), **American Classical Schools of Idaho, Inc.**, hereinafter called ("Buyer") agrees to purchase and **Boulder Creek Idaho Property**, hereinafter called ("Seller") agrees to sell the following described real estate (hereinafter referred to as the "Property"). The Buyer and the Seller are referred to herein individually as a "Party" and collectively as "Parties."
2. **PROPERTY ADDRESS AND LEGAL DESCRIPTION.** Parcel Number (Lot 12) located at 147 Emerson Lane, Bonners Ferry, Idaho 83619, Boundary County, State of Idaho, consisting of 13.4± acres of land, and legally described as set forth in the attached Exhibit A. Buyer and Seller authorize the Escrow Agent (as such term is defined in Section 5) to make corrections to the legal description at their request. The failure to have a full or complete legal description shall not render this Purchase Agreement void. The Parties agree that this transaction may close based on a metes and bounds legal description and that the land division and lot line adjustment may be required and recorded post-closing (the net result is intended to be Exhibit A for both recording and for encumbering for financing purposes).
3. **NO AGENT OR BROKER.** The Parties agree and acknowledge that no agents or responsible brokers have been engaged by either Party in connection with the transaction contemplated herein.
4. **EARNEST MONEY.**
 - (i) Upon mutual execution of this Purchase Agreement, Buyer shall deposit **Twenty-Five Thousand Dollars (\$25,000.00)** in the form of cash (the "Earnest Money Deposit") as earnest money with **TitleOne**, Attention: **Jen Stevens**, Phone: **(208) 263-2222** Email: **jstevens@titleonecorp.com** (the "Title Company" and/or "Escrow Agent" as applicable). The Earnest Money Deposit is refundable and the Earnest Money Deposit and the accumulated interest thereon shall be applied against the Purchase Price (as defined herein) at closing.
 - (ii) Earnest Money Deposit shall be held in trust in accordance with the terms and conditions of this Purchase Agreement.
5. **PRICE/TERMS.** Total Purchase Price (the "Purchase Price") is **three and one-half million 00/100 Dollars (\$3,500,000.00)**. Buyer must close on or before June 30, 2024.
 - (i) **\$25,000.00** Earnest Money Deposit
 - (ii) **\$3,475,000.00** Balance of the purchase price to be paid in Cash at Closing.
 - (iii) **Charitable Contribution Amount.** The amount of the charitable contribution shall be calculated by reducing the Appraised Fair Market Value by the


Buyer Initials Seller Initials

Cash Amount (“Charitable Contribution”). Buyer and Seller agree that a recent comparable market analysis valued the Property at \$8,339,360. Buyer provides no assurances as to the Charitable Contribution deduction as that matter is between Internal Revenue Service and Seller. Buyer is recognized as a 501c-3 public charitable corporation by the Internal Revenue Service. Buyer agrees, at no cost to Buyer, to reasonably cooperate with Seller and provide information and execute documents required by state or federal agencies in relation to Seller’s Charitable Contribution of the Appraised Value of the Property exceeding the Cash Amount.

6. INCLUDED ITEMS. All easement rights, mineral rights, other appurtenances, water and water rights appurtenant to or used on the Property including, but not limited to, any right Seller may have to receive natural flow and/or stored water delivered through any ditch, canal or water company’s facilities, or under entitlements held by a third party for use on the Property, and all shares, certificates, and other documents evidencing such water rights. This is subject to mutual agreement on water right allocation.


Other items specifically included in this sale: **None.**


Items specifically excluded from this sale: **None. Seller agrees to remove all personal property prior to closing. Any personal property remaining post-closing will become the possession of Buyer.**

7. SATISFACTION DATE. The date upon which all conditions and contingencies must either be satisfied or waived shall be January 5, 2024, (the “Satisfaction Date”), unless a later date is agreed upon by both parties. The Earnest Money Deposit shall become non-refundable after the Satisfaction Date; provided, however, that if such date is not a business day, the Satisfaction Date shall be the next business day immediately following such date.

8. BUYER CONDITIONS: The closing of this transaction is contingent upon satisfaction or waiver by Buyer of the following conditions:

- A. Inspection: Upon mutual execution of this Purchase Agreement Buyer shall be given full opportunity to inspect and investigate and to accept to Buyer’s satisfaction, each and every aspect of the Property independently or through agent(s) of Buyer.
- B. Charter Approval: The Parties acknowledge that Buyer is undergoing a process of charter approval to build and open a charter school on the Property. This Agreement is expressly conditioned upon the Buyer’s ability to achieve charter approval from its authorizer.
- C. Conditional Use Permit Approval: The Parties acknowledge that the Buyer needs to obtain a Conditional Use Permit in order to operate a school. The Buyer will begin the application as soon as this purchase and sales agreement is signed. This agreement is expressly conditioned upon the Buyer’s ability to obtain the Conditional Use Permit. The Parties further acknowledge that additional permitting (such as a conditional use permit) may be required for the project as a whole (for both Buyer and Seller), and the Parties agree to mutually work together in order to obtain any necessary permitting.


Buyer Initials


Seller Initials


D. Financing: This agreement is contingent upon Buyer obtaining financing and closing no later than June 30, 2024.

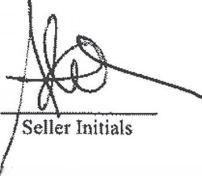
E. Buyer and Seller agree to mutually work together in order to obtain the following:

- i. Idaho Department of Environmental Quality (DEQ) certification of the water system for K-12 school use.
- ii. Panhandle Health District certification of the sewer system for K-12 school use.


If any of the foregoing conditions remain unsatisfied and unwaived by Buyer on the Satisfaction Date this Purchase Agreement may terminate, provided Buyer has given written notice of such unsatisfied and unwaived conditions to Seller by the Satisfaction Date, and the Earnest Money Deposit shall be returned to Buyer. Failure of Buyer to give written notice to Seller of unsatisfied conditions by the Satisfaction Date shall be deemed to be a waiver by Buyer of all such conditions.

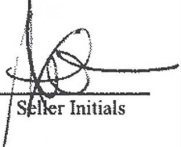
9. ADDITIONAL DOCUMENTS. The following additional documents shall be completed prior to the Satisfaction date, unless a later date is agreed to in writing by both parties.
 - A. Buyer and Seller agree to enter into a cross access easement to provide for emergency ingress and egress access.
 - B. Buyer and Seller agree to enter into an owner's association agreement, which will provide for certain rights and responsibilities including, but not limited to, landscape maintenance, private road maintenance, allocation of water and sewer capacity, etc.
 - C. Buyer and Seller acknowledge the need to address carrying cost incurred through closing and agree to work together to resolve this in concert.
10. RIGHT OF FIRST REFUSAL. In the event Buyer ceases operation of a public charter school on the Property, or intends to sell, transfer, or lease or otherwise dispose of the Property, Seller shall have the right of first refusal to purchase the Property for the price identified in Paragraph 5, above. If, after ninety (90) days, Seller has not exercised its right to purchase the Property, Buyer may market the Property and solicit offers from other parties.
11. SCHOOL USE COVENANT. Buyer commits to Seller that Buyer will only operate a public charter school on the property; and, subject to Paragraph 9 above, Buyer will not convey, transfer, or lease the Property (or any part thereof) to any party without Seller's prior written approval.
12. TITLE COMPANY/ESCROW AGENT. The Parties agree that the TITLE COMPANY/Escrow Agent as defined in Section 5, shall provide any required title policy and preliminary report or commitment. Each party agrees to pay one-half of the Escrow Agents fee.
13. EXCLUSIVE RIGHT. Buyer has exclusive right to purchase the property during the term of this Purchase Agreement.


Buyer Initials


Seller Initials

14. **TITLE INSURANCE.** Seller shall provide and pay for an ALTA Owner's or Purchaser's Standard Coverage Title Policy insuring the Buyer for the amount of the purchase price. Extended coverage required Yes No. Additional premiums for extended coverage and any survey required by the Title Company shall be paid by Buyer. Seller shall cause the Title Company to provide Buyer with a preliminary title report or commitment together with copies of all underlying documents giving rise to any exceptions listed therein on **within five (5) business days** of the execution of this Purchase Agreement. Buyer shall have until the Satisfaction Date to object, by written notice to Seller, to the condition of title as set forth in the report. In the event the Buyer makes written objection to any exception to title, Seller shall have a reasonable time, not to exceed **ten (10) days**, to remove any such objection to exception or provide affirmative title insurance coverage, and in the event the Seller cannot remove, or is unwilling to remove, such objected to exceptions or provide affirmative title insurance coverage, the Buyer may elect, as its sole remedy, to (a) either terminate this Purchase Agreement or (b) proceed to closing, taking title subject to such exceptions. If the Buyer does not object within the time frame set out above, the Buyer shall be deemed to have accepted the condition of the title. In the event Buyer elects to terminate this Purchase Agreement as provided herein, the Buyer shall be entitled to the return of all refundable deposits made by Buyer. The final title insurance policy shall be delivered to the Buyer by the Title Company as soon as possible after closing.
15. **CLOSING DATE.** On or before "**Closing**" ("**Closing**" shall be deemed to be the date on which the deed is recorded and the sales proceeds are available for disbursement to Seller and as otherwise directed by the Parties) Buyer and Seller shall deposit with the Escrow Agent all funds and instruments necessary to complete the sale. Closing shall occur no later than **June 30, 2024**.
16. **DOCUMENTS TO BE DELIVERED AT CLOSING.** On the date of Closing, Seller shall have executed, or caused to be executed, and delivered to the Escrow Agent the following documents, if required by Buyer, in a form reasonably acceptable to Buyer and Seller:
- (a) General Warranty Deed
 - (b) FIRPTA;
 - (c) An Assignment and assumption of all leases, warranties, contracts, and guarantees that effect the Property in a form mutually agreed to between the Parties, (if applicable);
 - (d) Bill of Sale (if applicable);
 - (e) Termination of existing lease; and
 - (f) Any other instruments or documents reasonably requested by Buyer.
17. **POSSESSION/PRORATION/CLOSING COSTS.** Buyer shall be entitled to possession on the day of Closing. Any taxes and water assessments (using the last available assessment as a basis), rents, insurance premiums, interest and reserves on obligations assumed and utilities shall be prorated as of Closing. Any tenant deposits held by Seller shall be credited to Buyer at Closing. All standard closing costs shall be shared by Buyer and Seller on a 50/50 basis, except the cost of an ALTA Standard Coverage Title Insurance policy as outlined in section 10 above and brokerage commissions outlined in section 22 below.


 Buyer Initials

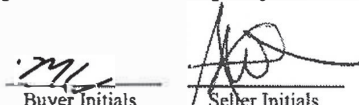

 Seller Initials

18. **DEFAULT.** If Seller executes this Purchase Agreement and title to the Property is marketable and insurable in the conditions approved under Section 8 hereof and all Buyer's contingencies have been removed or waived, and Buyer neglects or refuses to comply with the terms of or any condition of sale by the date on which such term or condition is to be complied with, then the Earnest Money Deposit shall be forfeited to Seller and Buyer's interest in the Property (with regard to this Purchase Agreement only) shall be immediately terminated. Such forfeiture and acceptance by Seller of the Earnest Money Deposit does not constitute a waiver or election of other remedies available to Seller and Seller shall have the right, at his option, to bring any action at law or equity to enforce the term of this contract or seek restitution for damages including any unpaid brokerage fee. In the event of default by either Party in its performance of the terms or conditions of this Purchase Agreement, the defaulting party agrees to pay all attorney fees and costs incurred by the non-defaulting party and in the event of suit the prevailing party shall be entitled to its reasonable attorney fees and costs.

In the event of a dispute between the Parties as to the Earnest Money Deposit deposited hereunder by Buyer, the Escrow Agent holding the Earnest Money Deposit may file an interpleader action in a court of competent jurisdiction to resolve any dispute between the Parties.


The Buyer and Seller authorize the Escrow Agent holding the Earnest Money Deposit to utilize as much of the Earnest Money Deposit as may be necessary to advance the costs and fees required for filing of any such action. The cost of such action shall be paid by the Party which is not the prevailing party.


19. **TITLE CONVEYANCE.** Title to the Property is to be conveyed by warranty deed and is to be marketable and insurable except for rights reserved in federal patents, building or use restriction, building and zoning regulations and ordinances of any governmental unit, rights of way and easements established or of record, and any other liens, encumbrances or defects approved by Buyer. In the event any personal property is included as part of the contemplated sale, it shall be conveyed by bill of sale and shall be free and clear of all liens, claims and encumbrances.
20. **RISK OF LOSS.** Seller shall keep the Property insured against loss by fire and other casualty usually insured against in the market area of the Property until the Closing. Should the Property be materially damaged by fire or other cause prior to closing and such damage is ten percent (10%) of the Purchase Price or less, then Seller shall pay or assign the proceeds of the insurance to Buyer (and pay to Buyer the amount of any deductible in cash) at Closing and Seller and Buyer shall proceed with Closing without adjustment to the Purchase Price. If such damage exceeds ten percent (10%) of the Purchase Price, then this Purchase Agreement shall be voidable at the option of the Buyer by written notice to Seller **within ten (10) days** of the date Buyer receives notice of such damage, however, Buyer may elect to proceed with Closing without adjustment to the Purchase Price (either by written notice of such election or by failure to timely send written notice of the voiding of this Purchase Agreement as provided above) and Seller shall pay or assign the proceeds of the insurance to Buyer (and pay to Buyer the amount of any deductible in cash) at Closing.
21. **CONDITION OF PROPERTY AT CLOSING.** Buyer agrees to purchase the Property in as is


Buyer Initials Seller Initials

(existing) condition, where is, with all faults. Buyer will assume those obligations with respect to the Property as are expressly stated in Section 7. Buyer does not agree to assume any other obligations with respect to the Property except for those obligations stated in Section 7. Seller shall maintain the Property until the closing in its present condition, ordinary wear and tear excepted, subject to the provisions of Sections 17 and 18 on casualty and condemnation.

22. **INSPECTION.** The Buyer hereby acknowledges further that Buyer is not relying upon any statement or representations by the Seller which are not herein expressed. The Buyer has entered into this Purchase Agreement relying upon information and knowledge obtained or to be obtained from Buyer's own investigation or personal inspection of the Property.
23. **ADDITIONAL PROVISIONS.** Additional provisions of this Purchase Agreement, if any, are attached hereto by an addendum consisting of -0- pages.
24. **ESCROW INSTRUCTIONS.** The Escrow Agent is instructed to, in a manner consistent with the terms hereof: receive and hold deposits and other funds; disburse such funds in accordance with separate authorization signed by Buyer and Seller; prepare closing statements for execution by Buyer and Seller; receive documents, secure their execution and acknowledgement, record them in the proper sequence, deliver originals to the appropriate parties, and deliver copies of all documents signed by either party to that party. If a dispute arises regarding any funds held by the Escrow Agent, such agent shall have no obligation to resolve such dispute but shall hold the same pending resolution of such dispute, and may at its option bring an action in interpleader.
25. **GOVERNING LAW.** This Purchase Agreement shall be governed by the laws of the State of Idaho.
26. **DISCLOSURE.** The Parties hereto acknowledge and understand that the transaction contemplated herein is anticipated to be financed through the issuance of nonprofit facilities revenue bonds by the Idaho Housing and Finance Association and agree to references to this Purchase Agreement and the transactions contemplated herein in any offering document prepared in connection therewith.
27. **TIME, SEVERABILITY.** Time is of the essence of this Purchase Agreement, and each party hereto agrees to promptly perform such acts as are reasonably required in connection herewith. If any provision of this Purchase Agreement is found by a court of competent jurisdiction to be invalid or unenforceable to any extent, the remainder of this Purchase Agreement shall not be affected thereby.
28. **NOTICES.** All notices required hereunder shall be given in writing and shall be deemed effective (a) upon delivery, if delivered in person, or by electronic transmission with receipt acknowledged by the recipient thereof; (b) one business day after deposited for overnight delivery with any reputable overnight courier service; or (c) two business days after deposited with the US Postal Service registered or certified mail and addressed to the Parties at the addresses set forth below.
29. **COUNTERPARTS.** This Purchase Agreement may be executed in several counterparts, each of which shall be deemed an original, all such counterparts together shall constitute one and the same instrument, and signature pages from one counterpart may be removed and added to another counterpart to create a single, integrated counterpart with all necessary signatures.



Buyer Initials


Seller Initials

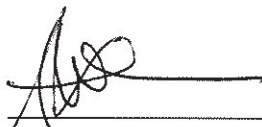
30. ENTIRE AGREEMENT – CONSTRUCTION. This Purchase Agreement constitutes the entire agreement between the Parties, has been entered into in reliance solely on the contents hereof, and supersedes any previous agreements, written or oral, between the Parties hereto. This Purchase Agreement shall not be modified except in writing signed by both Parties. This Purchase Agreement shall be construed neutrally rather than strictly for or against either party.
31. BINDING EFFECT – SURVIVAL. This Purchase Agreement shall be binding upon the heirs, administrators, executors, successors and assigns of the Parties hereto and shall survive the closing of this transaction.
32. LEGAL REPRESENTATION. The Parties expressly acknowledge they have been represented by counsel of their own choice in connection with this Purchase Agreement and have discussed the terms of this Purchase Agreement with such counsel to the extent each party believes it to have been necessary to fully understand the terms hereof. In entering into this Purchase Agreement, the Parties represent and declare that each of them fully understands the terms and effect of this Purchase Agreement.
33. TIME IS OF THE ESSENCE IN THIS PURCHASE AGREEMENT.

IN WITNESS WHEREOF, Buyer and Seller have executed this Purchase Agreement as of the date first written above.

BUYER: AMERICAN CLASSICAL
SCHOOLS OF IDAHO,
AND/OR ASSIGNS

By: 
 Print Name: Marvin Lasnick
 Date: 9-13-23
 Address: 500 SW 3rd Street
Fruitland, ID 83705

SELLER:

By: 
 Print Name: ADAM WARE MEMBER
 Date: 9-11-23
 Address: 21400 MORRISON LANE
MT VERNON WA. 98274



 Buyer Initials
 Seller Initials

EXHIBIT A

LEGAL DESCRIPTION OF PROPERTY


Parcel name: Lot 12


A portion of the North 1/2 of the Southwest 1/4 of Section 5, Township 61 North, Range 2 East, B.M., Boundary County, Idaho more particularly described as follows:

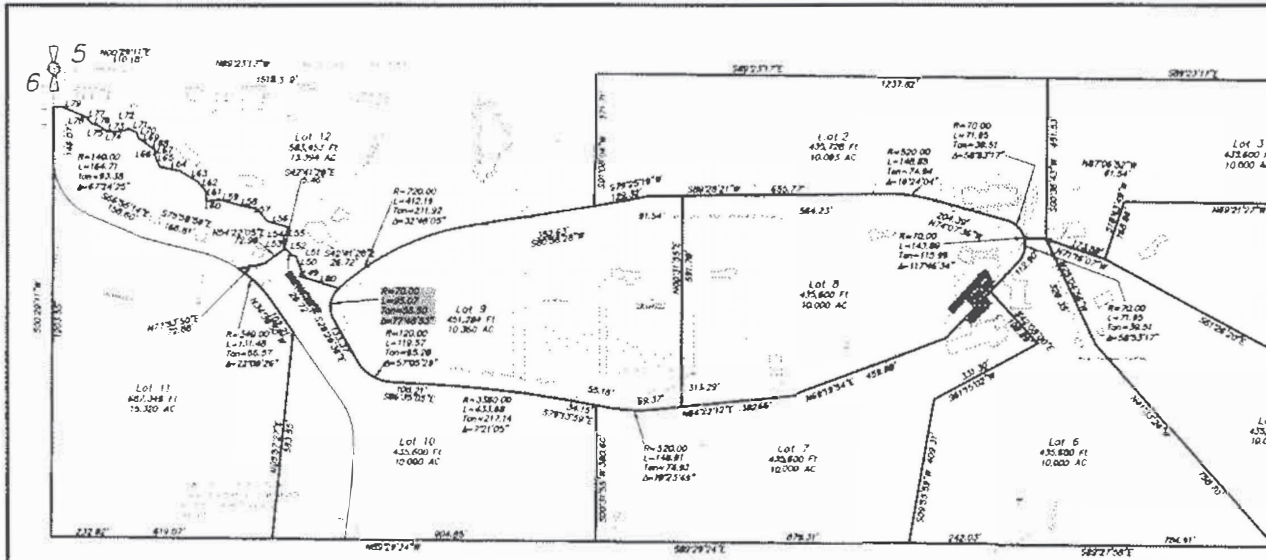
Beginning at the Northwest corner of the Southwest 1/4 of said Section 5, the True Point of Beginning thence on the North line of the Southwest 1/4 of said Section S 89-23-17 E a distance of 1519.39; thence S 01° 08' 04" W a distance of 371.71; thence S 80° 58' 28" W a distance of 352.63; thence on a tangent curve to the left a distance of 352.63 ft. which curve's radius is 720.00 ft. through a Delta angle of 32° 48' 05"; thence on a non-tangent line N 72°50-15 W a distance of 113.62; thence N 18°07-51 E a distance of 14.60; thence N 20° 17' 46" W a distance of 43.24 ft.; thence N 73° 03' 53" W a distance of 12.05 ft.; thence N 42° 41' 26" W a distance of 32.18 ft.; thence N 04° 11' 14" W a distance of 22.99 ft.; thence N 24° 17' 09" E a distance of 21.59 ft.; thence N 40° 10' 19" E a distance of 13.49 ft.; thence N 73° 50' 07" W a distance of 64.73 ft.; thence N 40° 09' 03" W a distance of 45.61 ft.; thence N 77° 53' 11" W a distance of 43.73 ft.; thence N 74° 28' 28" W a distance of 65.78 ft.; thence S 80° 30' 05" W a distance of 36.04 ft.; thence N 05° 04' 37" W a distance of 30.80 ft.; thence N 40° 37' 05" W a distance of 32.69 ft.; thence N 58° 08' 26" W a distance of 58.86 ft.; thence N 79° 24' 01" W a distance of 57.04 ft.; thence N 24° 05' 02" W a distance of 40.10 ft.; thence N 71° 46' 08" E a distance of 5.06 ft.; thence N 11° 09' 26" W a distance of 10.01 ft.; thence N 55° 00' 23" W a distance of 18.07 ft.; thence N 53° 52' 17" W a distance of 39.33 ft.; thence N 20° 16' 52" W a distance of 15.98 ft.; thence N 64° 39' 45" W a distance of 23.42 ft.; thence S 67° 29' 07" W a distance of 12.96 ft.; thence S 79° 47' 09" W a distance of 25.22 ft.; thence N 84° 53' 42" W a distance of 25.81 ft.; thence N 54° 11' 24" W a distance of 25.16 ft.; thence N 69° 27' 25" W a distance of 24.93 ft.; thence N 35° 31' 15" W a distance of 19.39 ft.; thence N 66° 43' 09" W a distance of 65.92 ft.; thence N 40° 27' 50" W a distance of 3.59 ft.; thence N 89° 23' 17" W a distance of 30.00 to the West line of the SW 1/4 of Section 5; thence on the West line of said section N 00° 29' 11" E a distance of 110.18 to the True Point of Beginning.

Said parcel contain 583,453 Ft (13.394 Acres).

Situated in Bonner's County, Idaho


Buyer Initials


Seller Initials



SURVEY INSTRUMENTATION DOUBLE S.S. & SERIAL 8271077, STD DEV ST. 1.0M & (1MM + 2PPM)

SURVEYING PROCEDURE FIELD PRESENCE LINEAR AND ANGULAR MEASUREMENTS MEET OR EXCEED STANDARDS SET IN IAC 332-100-080

BASIS OF BEARING LEGAL "DRAFT RIVER COLONY", AS PER PLAT RECORDED BY VOL. 8, PAGE 65 AND 64, RECORDS OF BOUNDARY COUNTY, IDAHO

DESCRIPTION THE NORTH HALF OF THE SOUTHWEST QUARTER AND THE NORTHWEST QUARTER OF THE SOUTH EAST QUARTER OF SECTION 3, TOWNSHIP 61 NORTH, RANGE 2 EAST, BOUNDARY METROPOLITAN, BOUNDARY COUNTY, IDAHO

LEGEND

- EXISTING SECTION CORNER MONUMENT IN CASE
- EXISTING 1/4 CORNER MONUMENT IN CASE
- EXISTING 1/8 CORNER MONUMENT IN CASE
- EXISTING MONUMENT IN CASE
- EXISTING NEEDLE
- EXISTING IRON PIPE
- 5/8" IRON SET WITH YELLOW CAP MARKED DES 15 28003
- EXISTING P.R. NAIL
- EXISTING PROPERTY CORNER
- NAIL & LATH
- 4" x 4" TREATED CEDAR POST PAINTED WHITE
- SURFACE MON BRASS COIN IN CONC.
- METAL FLAG

LOT 12 LINE TABLE		
LINE	LENGTH	BEARING
1.00	312.86	N72°20'31"W
1.01	14.62	N89°12'23"E
1.02	43.24	N40°17'46"W
1.03	12.05	N73°03'53"W
1.04	35.18	N42°24'30"W
1.05	22.89	N44°11'14"W
1.06	27.58	N45°12'02"E
1.07	13.49	N40°10'12"E
1.08	45.07	N40°10'12"E
1.09	43.23	N22°53'11"W
1.10	62.78	S74°28'28"W
1.11	36.04	S80°30'55"W
1.12	30.80	N05°04'13"W
1.13	39.89	N40°17'05"W
1.14	58.95	N05°04'13"W
1.15	57.04	N79°24'01"W
1.16	40.10	N24°30'02"W
1.17	5.18	N71°46'10"E
1.18	10.07	N10°00'26"W
1.19	18.07	N55°00'23"W
1.20	39.33	N43°26'27"W
1.21	15.38	N40°07'56"W
1.22	25.42	N64°19'45"W
1.23	12.86	S82°24'02"W
1.24	29.22	S79°47'09"W
1.25	25.81	N44°01'54"W
1.26	28.16	N44°11'24"W
1.27	24.85	N69°22'28"W
1.28	18.56	N10°00'26"W
1.29	45.22	N56°43'09"W
1.30	3.90	N40°22'50"W



SURVEYOR'S CERTIFICATE
 THIS MAP CORRECTLY REPRESENTS A SURVEY MADE BY ME OR UNDER MY DIRECTION IN CONFORMANCE WITH THE REQUIREMENTS OF THE SURVEY RECORDING ACT AT THE REQUEST OF _____
 DATE MADE _____ IN _____ 20____
 CERTIFICATE NO. 28023



Buyer Initials *ML*

Seller Initials *[Signature]*

NORTHWEST DATUM & DESIGN
 CIVIL ENGINEERING AND SURVEYING SOLUTIONS
 2209 LIBRICA DRIVE
 MOUNT VERNON, WASHINGTON 98273
 PH: (360) 424-4865


BLA SURVEY LOT II & 12
 SURVEY in a portion of the SW & SE 1/4 of Section 5, T. 61 N., R. 2 E. WM
 for **BOULDER CREEK IDAHO PROPERTY**
 in Mount Vernon, Washington

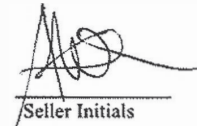
RECORDING CERTIFICATE
 FILED FOR RECORD AT THE REQUEST OF _____
 THIS _____ DAY OF _____ 20____ AT _____
 RECORDER UNDER AUDITOR'S FILE NO. _____
 BOUNDARY COUNTY, IDAHO
 COUNTY AUDITOR _____ DEPUTY AUDITOR _____

EXHIBIT B

DUE DILIGENCE MATERIALS

1. ALTA Surveys if available.
2. Copy of any warranties, maintenance, service, supply, management or other agreements presently in effect, or which may come into effect, of whatsoever nature affecting the Property.
3. Copy of real estate tax bills and assessments for the last year and current year.
4. Current commitment for title insurance from the Title Company, together with the copies of all documents referred to therein and all documents giving rise to exceptions to title.
5. Soils, asbestos, hazardous waste, and Phase 1 environmental assessment reports, if available.


Buyer Initials


Seller Initials



P

COW CREEK ROAD

THOMAS
JEFFERSON
Student Services

PROPOSED PROJECT

SS

Sheet

A-1

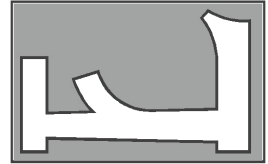
of sheets



101 Drake St.

**PRELIMINARY:
NOT FOR CONSTRUCTION**

AIII



ENDURING DESIGN STUDIO
SANDPOINT, IDAHO 83864
BRIAN@ENDURINGDESIGNSTUDIO.COM
509.540.9068

A NEW CHARTER SCHOOL FOR:

THE BOULDER CR

FLOOR PLANS

**PRELIMINARY:
NOT FOR CONSTRUCTION**

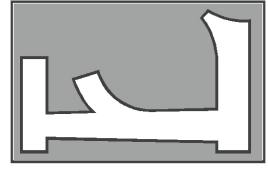
A NEW CHARTER SCHOOL FOR:
THE BOULDER CR
FLOOR PLAN


ENDURING DESIGN STUDIO
SANDPOINT, IDAHO 83864
BRIAN@ENDURINGDESIGNSTUDIO.COM
509.540.9068

A112

**PRELIMINARY:
NOT FOR CONSTRUCTION**

AIII

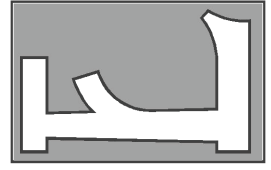


ENDURING DESIGN STUDIO
SANDPOINT, IDAHO 83864
BRIAN@ENDURINGDESIGNSTUDIO.COM
509.540.9068

A NEW CHARTER SCHOOL FOR:
THE BOULDER CR
FLOOR PLAN

**PRELIMINARY:
NOT FOR CONSTRUCTION**

A III



ENDURING DESIGN STUDIO
SANDPOINT, IDAHO 83864
BRIAN@ENDURINGDESIGNSTUDIO.COM
509.540.9068

A NEW CHARTER SCHOOL FOR:
THE BOULDER CR
FLOOR PLAN



2699 First Street
 Richland, WA 99354
 Phone: 509-375-4858

Lease Quotation

Customer:	North Idaho Classical Academy	Ship To:	North Idaho
Attention:	Dr. Jacob Francom		
Phone #:	406-293-1080 @		

Date:	10/26/23	Terms:	Ship Via:
Contact:	Quote is valid for 30 days.		

Email:

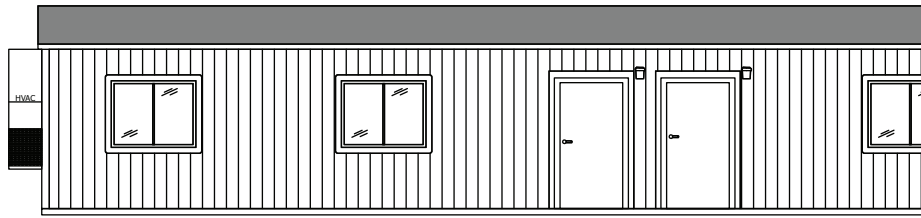
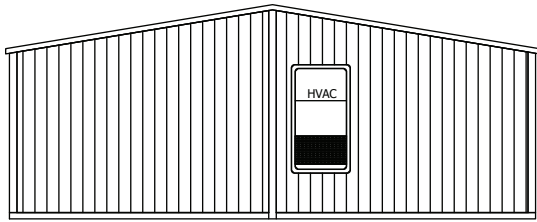
Direct Phone:

PRICING & DESCRIPTION
 28x64 classroom with restrooms

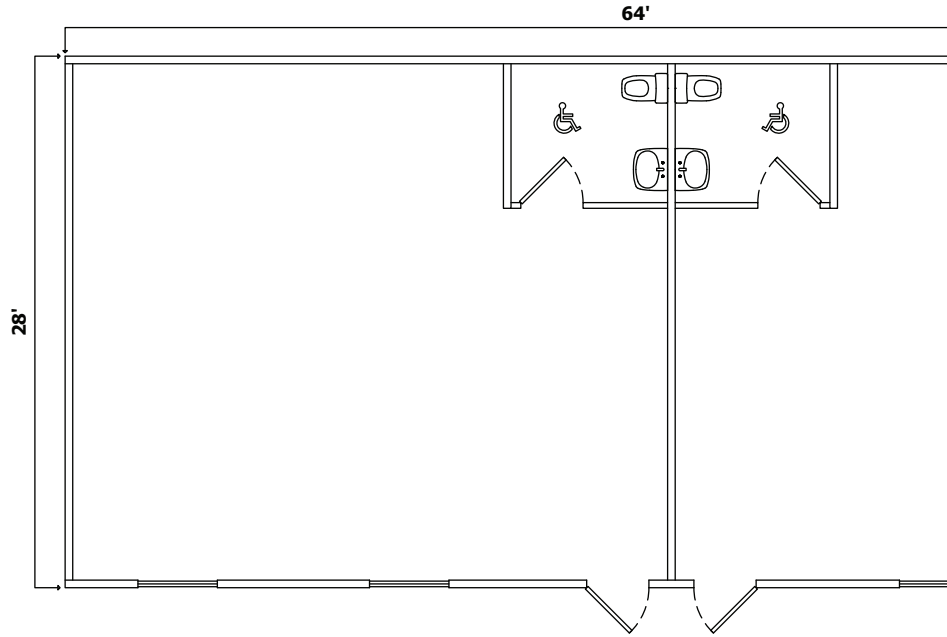
-
-
-
-
-

Monthly Charges		
Lease Rate:		\$ 2,878.00
Purchase Price		\$ 255,000.00
Filter replacement program:		\$ 54.00
One Time Charges (Billed at start of Lease)		
Delivery:		\$ 2,830.00
Delivery fuel 12 wide		\$ 250.00
Material Handling Fee		\$ 150.00
Installation:		\$ 8,900.00
Anchors:	192	\$ 6,720.00
Skirting:	22	\$ 3,850.00
One Time Charges (Billed at end of Lease)		
Return Delivery:		\$ 2,830.00
Return Delivery fuel:		\$ 250.00
Cleaning Fee:		\$ 900.00
Return Delivery:		\$ 1,620.00
Dismantling:		\$ 6,100.00
Unanchor:		\$ 930.00
Unskirt:		\$ 1,400.00

- Quote is valid for 30 days
- Sales Tax will be calculated based on the tax rate at the time of invoicing.
- Sales Tax is charged on all the materials and the monthly pricing including Personal Property Expense.
- If buildings need to be rolled or nosed into place there will be additional costs.
- Set-up cost based on 1,500 p.s.f. soil bearing capacity.



- Two 924 square foot classrooms with restroom.
- Upgraded vinyl covered wall panels.
- Energy efficient fluorescent lighting.
- Acoustical T-bar ceiling decreases noise from room to room.
- Decorative exterior siding for a modern appearance.
- Our buildings are completely insulated and come with a heating and air conditioning system to provide a comfortable learning environment.



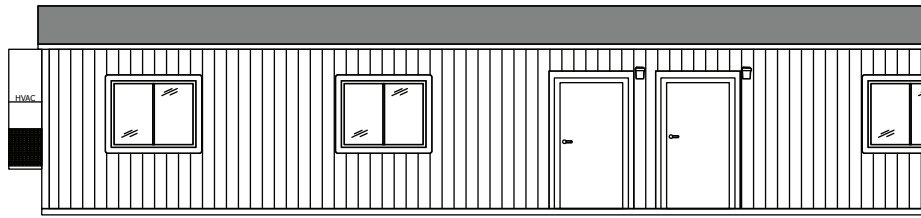
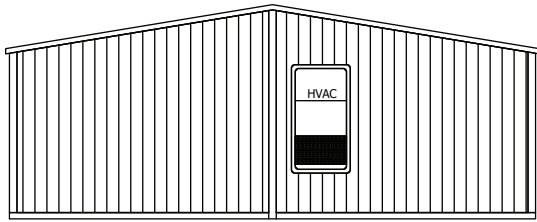
Note: Dimensions, and door & window locations shown are nominal. Actual dimensions, layout, and roof slope may vary depending on model or model year selected.

Call Your Local
Sales Professional
800.944.3442

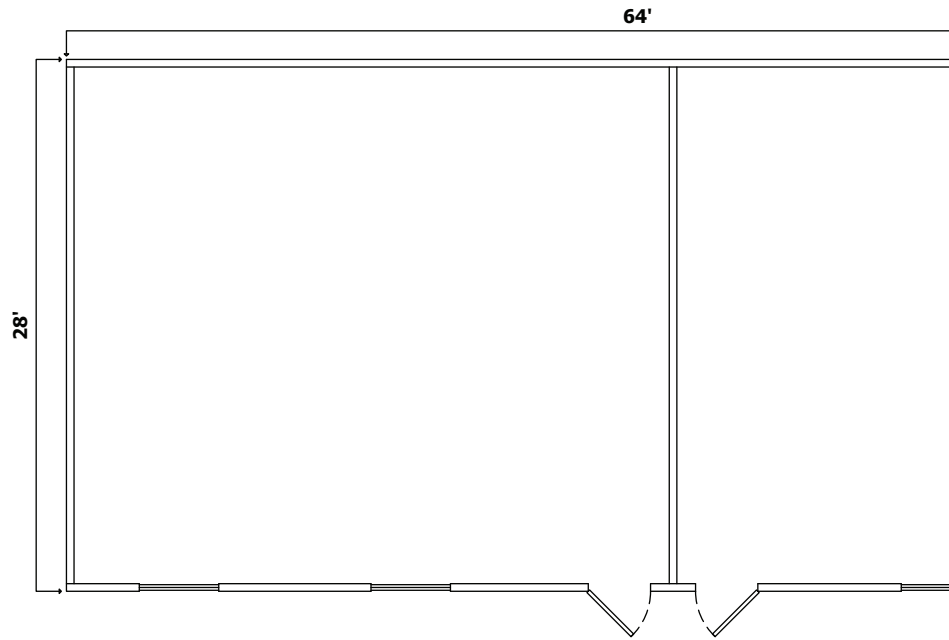
28' x 64' Modular Classroom with Restroom

Classroom, 28x64 WMS (NonStd)(Item2104)

m
m
www.



- Two 924 square foot classrooms.
- Upgraded vinyl covered wall panels.
- Energy efficient fluorescent lighting.
- Acoustical T-bar ceiling decreases noise from room to room.
- Decorative exterior siding for a modern appearance.
- Our buildings are completely insulated and come with a heating and air conditioning system to provide a comfortable learning environment.



Note: Dimensions, and door & window locations shown are nominal. Actual dimensions, layout, and roof slope may vary depending on model or model year selected.

Call Your Local
Sales Professional
800.944.3442

28' x 64' Modular Classroom

Classroom, 28x64 WMS (Item2103)

m
m
www.



August 21, 2023

Stephen Lambert
Executive Director
American Classical Schools of Idaho

Dear Stephen

Please accept this letter as verification of Umpqua Bank's interest in financing of the Bonners Ferry Charter School project we previously discussed. It is our understanding that you intend on financing the project through several avenues including traditional bank financing, donations, the State of Idaho Revolving Loan Fund, and State of Idaho Moral Obligation Bonds.

We understand that not all information is currently available to fully underwrite a credit facility of this nature, but based on the terms we preliminarily discussed, we feel the request is one we would be interested investigating further. Some of the terms noted were:

- Interim Bank construction and stabilization for an expected term of three to five years.
- The Bank would be in a first position on the real estate collateral at a low loan to value.
- Bank financing would support the remodel of the identified property and be refinanced via State of Idaho Moral Obligation Bonds once the School became eligible.
- The School would raise funds via donations and grants in an amount sufficient to cover debt service and operations until tuition was received.

Please let me know what other information I might be able to supply to ensure your application is complete. We look forward to working with you on a financing package with rates and terms that fit the budget of the School and ensure the project moves forward. We feel this project will make a very big impact on the lives of children in and around Bonners Ferry.

Sincerely

A handwritten signature in blue ink, appearing to read "Joe Williams", with a long, sweeping underline.

Joseph Williams
SVP – Umpqua Bank
208-265-3796
joewilliams@umpquabank.com



October 24, 2023

Stephen Lambert
American Classical Schools of Idaho
500 SW 3rd St.
Fruitland, ID 83619

Re: North Idaho Classical Academy

Dear Mr. Lambert:

This letter is an outline of the terms under which Mountain West Bank, Division of Glacier Bank (the "Bank") would consider a loan to finance the purchase and construction of a new charter school in Bonners Ferry, ID. This letter does not represent a commitment by the Bank, nor does it define all the terms and conditions under which the Bank would commit to a loan. A formal commitment for financing may be issued upon receipt and review of certain financial and project related information and after formal approval by the Bank. The possible terms and conditions are as follows:

Project Description

Acquisition of real estate, renovations, and equipping of a new charter school located in Bonners Ferry, Idaho.

Borrower

North Idaho Classical Academy

Guarantors

None

Loan Amount

Approximately \$1,770,000; Loan amount not to exceed 50% of the lower of total project cost or the market value of the Project as determined by an appraisal

Loan Type

Draw down line of credit during construction, amortizing term loan thereafter.

Loan Maturity

120 months from date of origination

Repayment

Payment of accrued interest on the outstanding balance of the loan will be due monthly during the 12-month (up to 18-months if borrower chooses) draw down period; followed by monthly principal and interest payments in an amount sufficient to amortize the outstanding principal balance on the loan over 25 years; followed by a balloon payment of all unpaid principal and accrued interest on the maturity date.

Loan Fee

0.25% of the loan amount

Loan Interest Rate

- 5-year adjustable rate to be priced Federal Home Loan Bank of Des Moines Five Year Fixed Rate index plus a margin of 3.25% over the index (currently 7.86%), adjusting every five years using the Federal Home Loan Bank of Des Moines Five Year Fixed Rate index plus the margin. The interest rate will not be set until 30 days prior to loan closing. This loan has an interest rate floor of 5.00%.

Collateral

- First position security interest in the project assets as evidenced by a Deed of Trust and Security Agreements. The Bank will obtain a title insurance policy ensuring its lien on the property to be in a first position subject only to those exceptions as are acceptable to it as evidenced on a preliminary title report.

Prepayment Premium

- 3-year declining prepayment penalty: 5% penalty during the first loan year, 3% penalty during the second loan year, 1% penalty during the third loan year.

Other

- Borrower to be awarded all funding for project prior to loan closing.
- Borrower equity injection for site and building construction costs to be funded prior to disbursement of any loan funds, bank loan funds are to be injected into the project last to fund completion.
- Construction funds will be disbursed not more often than monthly based on a percentage of completion and only after an independent inspector, at the borrower's expense, has confirmed that the draw request is accurate, and a date down endorsement has been received showing no liens.
- Project to meet minimum Debt Service Coverage Ratio of 1.20:1. The Debt Service Coverage Ratio will be calculated by dividing Earnings Before Interest Depreciation and Amortization by principal and interest payments due on all Indebtedness of the project. This Ratio will be measured annually, starting the first fiscal year-end after the loan amortization period starts.
- Construction contingency to be a minimum of 5%.
- Construction and Architect contract to be assigned to Bank.

Fees and Expenses

Borrower will pay all reasonable costs incurred by the Bank in connection with the loan including, but not limited to, environmental, title and recording fees, legal, outside construction inspections, and appraisal fees.

Conditions: Prior to the closing of the loan, borrower must satisfy the conditions of closing or funding as may be specified or required in writing by lender pursuant to the loan documents, any exhibit, letter, or otherwise. All documents, instruments and information referred to in this proposal or otherwise required by lender must be acceptable to lender in its sole discretion. Borrower shall have complied with all the terms and conditions of the loan documents; and all loan documents shall have been executed and delivered to lender and recorded and filed as appropriate.

Additional Terms and Conditions: The loan documents will contain additional terms and conditions applicable to the loan, including provisions prohibiting transfers of interests in borrower or the project without lender's consent, and all such additional terms and conditions as are material to lender's agreement to commit to or make the loan to borrower pursuant to this proposal for financing.

Expiration: None.

PLEASE NOTE: ORAL AGREEMENTS OR ORAL COMMITMENTS TO LOAN MONEY, EXTEND CREDIT, OR TO FORBEAR FROM ENFORCING REPAYMENT OF A DEBT ARE NOT ENFORCEABLE UNDER WASHINGTON LAW.

Sincerely,



Besse Bailey
SVP Commercial Manager
Mountain West Bank
12321 E. Mission Ave.
Spokane, WA 99216

Accepted by:

North Idaho Classical Academy

By: _____

Date: _____

Preliminary Financial Commitment

November 9, 2023

Stephen Lambert
Executive Director
American Classical Schools of Idaho

Dear Mr. Lambert,

Raymond James and Associates (“Raymond James”) is pleased to present this preliminary financial commitment sheet which outlines financing options, credit quality, and credibility of North Idaho Classical Academy (“NICA” or the “Borrower”).

Proposed Financing

Once NICA has an approved charter, Raymond James can execute on a financing for NICA to successfully open the charter school, subject to standard due diligence and market conditions. Raymond James may serve as placement agent or underwriter to finance the acquisition and improvement of facilities for NICA utilizing one or a combination of the following financing options:

- Bank Loan;
- Revolving Loan Fund;
- CDFI Loan;
- Tax-Exempt Bonds; or
- USDA Direct Loan

Credit Quality and Credibility

NICA, which is projected to open in the fall of 2025, has almost 500 students on its “Intent to Enroll” list. NICA’s school leader, Dr. Jacob Francom, has been selected for the JKAF New School Fellowship. More importantly, American Classical Schools of Idaho’s (support organization for NICA) proven track record provides investors and banks with the confidence needed to finance NICA. Below is a quick summary of the two schools started by American Classical Schools of Idaho.

- Treasure Valley Classical Academy (“TVCA”), ACSI’s first school, enrolls 578 students with 194 students on its waitlist
- TVCA had 96 Days Cash on Hand and approximately 2x debt/lease coverage in FY23
- Idaho Novus Classical Academy (“INCA”) successfully financed its new facility and is currently in construction, which is projected to open in the fall of 2024
- INCA currently has 678 students on its “Intent to Enroll” list, substantially in excess of year 1 enrollment targets

Summary

Raymond James is confident a financial closing for NICA’s facility will be executed on time with favorable terms to the borrower. Given NICA’s desire to close on a financing by 6/30/2024 at the latest, there is sufficient time to explore various financing options to determine the optimal structure and lending partner, for the benefit of NICA’s students and future operations.

Non-Binding Commitment Letter

This non-binding financial commitment sheet constitutes as a preliminary commitment subject to market trends, charter approval and restrictions, and other factors which may be out of the control of Raymond James. This preliminary commitment does not present an obligation of any kind to Raymond James.

Thank you for the opportunity to work with Northern Idaho Classical Academy. Should you have any questions, please do not hesitate to contact me at 952-807-7233 or wes.olson@raymondjames.com.

Sincerely,

Wes Olson

Wes Olson

Managing Director

Raymond James & Associates

BLUUM PARTNER SCHOOLS BY COMMUNITY (2022)

From the rolling farmland of the Palouse Prairie to the far reaches of forested mountains, Bluum has supported 37 schools since 2014 in varied communities throughout our great state.

37 Schools
20 Communities
Charter | District | Parochial



INVESTMENT SUMMARY

2015-2022



NEW SCHOOLS OPENED IN 2022

Elevate Academy Nampa
Grades 6-12 | 486 New Seats

Elevate Academy North
Grades 6-12 | 308 New Seats

Gem Prep: Meridian South
Grades K-12 | 574 New Seats

INNOVATIVE SCHOOLS

This year marks the 25th anniversary of Idaho charter schools. Over the last decade, the state's overall K-12 enrollment has grown by about 55,000 students, almost 20% of that new enrollment (10,422 students) has been in the state's public charter schools. The Gem State boasts a robust mix of single-site schools, as well as several emerging charter school networks.

The Elevate Academy Network is successfully addressing an unmet demand with their 6-12th grade CTE model designed specifically for at-risk students. American Classical Schools of Idaho will work in coming years to offer their classical academic model to communities across the state.

Gem Innovation Schools, Idaho's very first homegrown charter school network, is leveraging their high-performing online school to pioneer their innovative Learning Societies in Lewiston and Emmett.

Bluum is excited about three schools that will open in the next couple of years: Elevate Academy East in Idaho Falls, Gem Prep: Twin Falls, and Idaho Novus Classical Academy at Avimor, a planned community north of Boise.

Boulder Creek Idaho Property LLC
147 Emerson Lane
Bonners Ferry, Idaho 83805

October 23, 2023

Idaho Public Charter School Commission
514 W. Jefferson Street Suite 303
Boise, Idaho 83702

Subject: Letter of Support for the Sale of Property to North Idaho Classical Academy

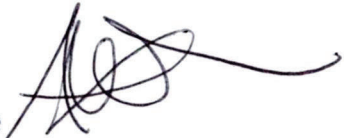
Dear Commissioners,

I am writing to express our support for the sale of the property owned by Boulder Creek Idaho Property LLC, located at 147 Emerson Lane, Bonners Ferry, Idaho, to North Idaho Classical Academy (NICA). As the Managing Director of Boulder Creek Idaho Property LLC, I am pleased to convey our strong endorsement of this transaction.

Boulder Creek Idaho Property LLC has recently entered into a purchase and sale agreement with NICA. We believe that this agreement signifies a significant step towards providing a valuable educational resource to our community. We are confident that NICA is committed to providing a content-rich and character-focused American classical education—the kind of educational choice that our community appreciates.

In conclusion, we are fully supportive of NICA's application for a charter from the Idaho Public Charter School Commission. If there is any further information or assistance required from our end in the application or approval process, please do not hesitate to contact us. We look forward to witnessing the positive impact that North Idaho Classical Academy will have on the community and are enthusiastic about the prospect of this sale.

Sincerely,

Adam Ware 
Managing Director
Boulder Creek Idaho Property LLC

APPENDIX SERIES C: GOVERNANCE DOCUMENTS



0004869739



STATE OF IDAHO
Office of the secretary of state, Lawrence Denney
ARTICLES OF INCORPORATION (NONPROFIT)
 Idaho Secretary of State
 PO Box 83720
 Boise, ID 83720-0080
 (208) 334-2301
 Filing Fee: \$30.00

For Office Use Only
-FILED-
 File #: 0004869739
 Date Filed: 8/25/2022 12:17:36 PM

B0735-2463 08/25/2022 12:18 PM Received by ID Secretary of State Lawrence Denney

Articles of Incorporation (Nonprofit)	
Select one: Standard, Expedited or Same Day Service (see descriptions below)	Expedited (+\$40; filing fee \$70)
Article 1: Corporation Name Entity name	American Classical Schools of Idaho, Inc.
Article 2: Effective Date The corporation shall be effective	when filed with the Secretary of State.
Article 3: Purpose The purpose for which the corporation is organized is:	Educational
Article 4: Voting Members: The corporation	does not have voting members.
Article 5: Asset Distribution on Dissolution Upon dissolution the assets shall be distributed:	other asset distribution: In the event of dissolution or cessation of all activities of the corporation, all assets remaining after return of grant funds to the respective grantor and payment of any outstanding liabilities shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future purpose.
Article 6: IRS Designation Is this nonprofit a 501(c)3? 501(c)3 purpose for which the corporation is organized:	Yes This corporation is designed to support, sustain and grow the Treasure Valley Classical Academy and other public charter schools through charter application and management support, fundraising efforts and management of grants issued for the benefit of the respective schools.
Article 7: The mailing address of the corporation shall be: Mailing Address	STEPHEN P LAMBERT 500 SW 3RD ST FRUITLAND, ID 83619-2506
Article 8: Registered Agent Name and Address Registered Agent	Registered Agent Chris Yorgason Physical Address: 6200 N MEEKER PLACE SUITE 200 BOISE, ID 83713 Mailing Address: 6200 N MEEKER PL STE 200 BOISE, ID 83713-1891
<input checked="" type="checkbox"/> I affirm that the registered agent appointed has consented to serve as registered agent for this entity.	
Article 9: Incorporator Name(s) and Address(es)	
Name	Incorporator Address



Chris Yorgason	6200 N MEEKER PLACE SUITE 200 BOISE, ID 83713
----------------	---

Article 10: Director Name(s) and Address(es)

Name	Title	Director Address
Marvin Lasnick	Director	500 SW 3RD ST FRUITLAND, ID 83619-2506
Stacy Saylor	Director	500 SW 3RD ST FRUITLAND, ID 83619-2506
Ruth David	Director	500 SW 3RD ST FRUITLAND, ID 83619-2506
John Bassetti	Director	500 SW 3RD ST FRUITLAND, ID 83619-2506
Terry Ryan	Director	500 SW 3RD ST FRUITLAND, ID 83619-2506

The Articles of Incorporation must be signed by at least one Incorporator.

Chris Yorgason _____ 08/25/2022
 Chris Yorgason _____ Date



Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

AMERICAN CLASSICAL SCHOOLS OF IDAHO INC
C/O STEPHEN LAMBERT
500 SW 3RD STREET
FRUITLAND, ID 83619

Date:
06/02/2023
Employer ID number:
92-0378427
Person to contact:
Name: Customer Service
Telephone:
Accounting period ending:
December 31
Public charity status:
509(a)(3)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
August 25, 2022
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053417007453

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

Specifically, we determined you're a Type III functionally integrated supporting organization under IRC Section 509(a)(3). A Type III supporting organization is operated in connection with one or more publicly supported charities.

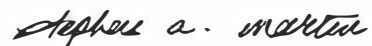
If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

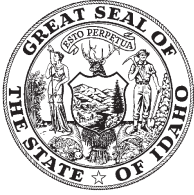
Letter 947 (Rev. 2-2020)
Catalog Number 35152P

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

A handwritten signature in black ink that reads "Stephen A. Martin". The signature is written in a cursive style.

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements



STATE OF IDAHO

Phil McGrane | Secretary of State

Business Office

450 North 4th Street

PO Box 83720

Boise, ID 83720

North Idaho Classical Academy LLC
DR. JACOB FRANCOM
PO BOX 734
BONNERS FERRY, ID 83805-0734

Filing Acknowledgment

Please review the filing information below and notify our office immediately of any discrepancies.

File # :	5159805	Filing Date:	03/17/2023
Filing Type:	Limited Liability Company (D)	Annual Report Due:	03/31/2024
Status:	Active-Existing	Image #:	B0786-4778
Duration Term:	Perpetual	Receipt #:	000796724

Registered Agent:

Chris Yorgason
6200 N MEEKER PLACE
BOISE, ID 83713

Principle Address:

North Idaho Classical Academy LLC
DR. JACOB FRANCOM
105 RAINBOW LANE
MOYIE SPRINGS, ID 83845

Mailing Address:

DR. JACOB FRANCOM
PO BOX 734
BONNERS FERRY, ID 83805-0734

Congratulations on the successful filing of your **Certificate of Organization of Limited Liability Company** for **North Idaho Classical Academy LLC** in the state of Idaho on the date shown above.

You must file an Annual Report with this office on or before the Annual Report Due Date noted above and maintain a Registered Office and Registered Agent. Failure to do so will subject the business to Administrative Dissolution/Revocation.

Phil McGrane
Idaho Secretary of State

Processed By: Business Division

Phone: 208-334-2301 * Email: business@sos.idaho.gov * Website: sosbiz.idaho.gov

Date of this notice: 03-29-2023

Employer Identification Number:
92-3219383

Form: SS-4

Number of this notice: CP 575 G

NORTH IDAHO CLASSICAL ACADEMY LLC
JACOB A FRANCOM SOLE MBR
PO BOX 734
BONNERS FERRY, ID 83805

For assistance you may call us at:
1-800-829-4933

IF YOU WRITE, ATTACH THE
STUB AT THE END OF THIS NOTICE.

WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN 92-3219383. This EIN will identify you, your business accounts, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

Taxpayers request an EIN for their business. Some taxpayers receive CP575 notices when another person has stolen their identity and are opening a business using their information. If you did **not** apply for this EIN, please contact us at the phone number or address listed on the top of this notice.

When filing tax documents, making payments, or replying to any related correspondence, it is very important that you use your EIN and complete name and address exactly as shown above. Any variation may cause a delay in processing, result in incorrect information in your account, or even cause you to be assigned more than one EIN. If the information is not correct as shown above, please make the correction using the attached tear-off stub and return it to us.

A limited liability company (LLC) may file Form 8832, *Entity Classification Election*, and elect to be classified as an association taxable as a corporation. If the LLC is eligible to be treated as a corporation that meets certain tests and it will be electing S corporation status, it must timely file Form 2553, *Election by a Small Business Corporation*. The LLC will be treated as a corporation as of the effective date of the S corporation election and does not need to file Form 8832.

To obtain tax forms and publications, including those referenced in this notice, visit our Web site at www.irs.gov. If you do not have access to the Internet, call 1-800-829-3676 (TTY/TDD 1-800-829-4059) or visit your local IRS office.

(Rev. January 2020)

Department of the Treasury
Internal Revenue Service

Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form1023 for instructions and the latest information.**Note:** *If exempt status is approved, this application will be open for public inspection.*

Use the "?" buttons throughout this form for help in completing this application. For additional help, call IRS Exempt Organizations Customer Account Services toll-free at 1-877-829-5500.

If you cannot complete required responses within the textbox limits throughout this form, upload your additional narratives with the other required documents.

Part I Identification of Applicant

1a Full Name of Organization (exactly as it appears in your organizing document) NORTH IDAHO CLASSICAL ACADEMY LLC			b Care of Name (if applicable)		
c Mailing Address (Number, street and room/suite) PO BOX 734		d City BONNERS FERRY		e Country United States	
f State Idaho		g Zip Code + 4 83805	h Foreign Province (or State)		i Foreign Postal Code
2 Employer Identification Number 92-3219383		3 Month Tax Year Ends JUNE		4 Person to Contact if More Information is Needed (officer, director, trustee, or authorized representative) JACOB FRANCOM	
5 Contact Telephone Number 406-293-1080			6 Fax Number (optional)		7 User Fee Submitted \$600.00
8 Organization's Website (if available): www.nicak12.org					
9 List the names, titles, and mailing addresses of your officers, directors, and/or trustees.					
First Name: JACOB		Last Name: FRANCOM		Title: DIRECTOR	
Mailing Address: PO BOX 734			City: BONNERS FERRY		
State (or Province): IDAHO			Zip Code (or Foreign Postal Code): 83805		
First Name: MARVIN		Last Name: LASNICK		Title: BOARD CHAIR	
Mailing Address: 500 SW THIRD STREET			City: FRUITLAND		
State (or Province): IDAHO			Zip Code (or Foreign Postal Code): 83619		
First Name: RUTH		Last Name: DAVID		Title: BOARD MEMBER	
Mailing Address: 500 SW THIRD STREET			City: FRUITLAND		
State (or Province): IDAHO			Zip Code (or Foreign Postal Code): 83619		
First Name: STACY		Last Name: SAYLOR		Title: BOARD MEMBER	
Mailing Address: 500 SW THIRD STREET			City: FRUITLAND		
State (or Province): IDAHO			Zip Code (or Foreign Postal Code): 83619		
First Name: TERRY		Last Name: RYAN		Title: BOARD MEMBER	
Mailing Address: 500 SW THIRD STREET			City: FRUITLAND		
State (or Province): IDAHO			Zip Code (or Foreign Postal Code): 83619		

 Check here to add more officers, directors, and/or trustees.

JOHN BESSETTI, Board Member, 500 SW THIRD STREET, FRUITLAND, IDAHO, 83619

NOTE:

This non-profit application was submitted to the IRS on May 12, 2023 and according to the IRS website we expect to receive formal nonprofit status by the end of 2023.

BYLAWS OF
AMERICAN CLASSICAL SCHOOLS OF IDAHO, INC.

The following BYLAWS are for the regulation and internal operations, except as otherwise provided by the statute and by its Articles of Incorporation, of AMERICAN CLASSICAL SCHOOLS OF IDAHO, INC., an Idaho Nonprofit Corporation.

I. MEMBERSHIP

The corporation has no members. The rights which would otherwise vest in the members vest in the directors of the corporation (hereinafter "Directors") of AMERICAN CLASSICAL SCHOOLS OF IDAHO, INC. (hereinafter "ACSI"). Actions which would otherwise require approval by a majority of all members or approval by the members require only approval of a majority of all Directors.

II. BOARD OF DIRECTORS

A. Powers

The Board of Directors of ACSI shall serve and be known as the Board of Directors of American Classical Schools of Idaho (the "Board"). The Board shall conduct or direct the affairs of ACSI and exercise its powers, in accordance with and subject to the limitations of the Chapter 52, Title 33, Idaho Code, and Idaho Nonprofit Corporation Act, Chapter 30, Title 30, Idaho Code. The Board may delegate the management of the activities of ACSI to others, so long as the affairs of ACSI are managed, and its powers are exercised, under the Board's ultimate jurisdiction. Without limiting the generality of the powers here granted to the Board, but subject to the same limitations, the Board shall have all the powers enumerated in these Bylaws, and the following specific powers:

- to appoint and remove Directors.
- to select and remove officers, agents and employees of ACSI; to prescribe powers and duties for them; and to fix their compensation.
- to conduct, manage and control the affairs and activities of ACSI, and to make rules, regulations and policies.
- to enter into contracts, leases and other agreements which are, in the Board's judgment, necessary or desirable in obtaining the purposes of promoting the interests of ACSI.
- to act as trustee under any trust incidental to ACSI's purposes, and to receive, hold, administer, exchange and expend funds and property subject to such a trust.
- to acquire real or personal property, in the name of ACSI, by purchase, exchange, lease, gift, devise, bequest, or otherwise, and to hold, improve, lease, sublease, mortgage, transfer in trust, encumber, convey or otherwise dispose of such property.
- to borrow money, incur debt, and to execute and deliver promissory notes, bonds, debentures, deeds of trust, mortgages, pledges, hypothecations and other evidences of debt and securities.

- to indemnify and maintain insurance on behalf of any of its Directors, officers, employees or agents for liability asserted against or incurred by such person in such capacity or arising out of such person's status as such, subject to the provisions of the Chapter 52, Title 33, Idaho Code and limitations noted in these Bylaws.
- to hire employees either on an at-will basis or via a written contract whose duties shall be specified by the Board.

B. Number of Directors

The number of voting Directors of ACSI shall be not less than three (3) nor more than eleven (11). The Board may have non-voting members of the board as determined below. The Board shall fix the exact number of Directors, within these limits, by Board resolution or amendment of the Bylaws.

C. Appointment of Directors

1. The Board shall appoint the Directors by a vote of a majority of the voting Directors then in office, whether or not the number of directors in office is sufficient to constitute a quorum, or by the sole remaining director. The Board shall consist of individuals who will serve the interests of ACSI faithfully and effectively.

2. Terms of Office

- a. The term of office of all members of the initial Board of Directors shall be staggered, by designating approximately one-third of the Directors to one-, two- and three-year terms. Following the expiration of those designated terms, the term of each Director shall continue for three years.
- b. The term of office of a Director appointed to fill a vacancy in these Bylaws begins on the date of the Director's appointment and continues for the balance of the un-expired term.

D. Removal of Directors

1. The Board may remove a Director without cause as provided by the Idaho Nonprofit Corporation Act. The board may also remove any Director with cause who:

- a. has failed to attend four or more of the Board's Regular Meetings in any calendar year;
- b. has been declared of unsound mind by a final order of court; has been convicted of any felony;
- c. has been found by a final order or judgment of any court to have breached any duty imposed by the Idaho Nonprofit Corporation Law; or
- d. for such other good causes as the Board may determine.

2. Written notice of removal of an appointed director shall be given to the individual and the removal is effective as of the date of notice, unless the notice specifies a future effective date.

E. Resignation by Director

A Director may resign by giving written notice to the Board Chair or Secretary. The resignation is effective on the giving of notice, or at any later date specified in the notice.

F. Vacancies

A vacancy is deemed to occur on the effective date of the resignation of a Director, upon the removal of a Director, upon declaration of vacancy pursuant to these Bylaws, or upon a Director's death, or any other cause. A vacancy is also deemed to exist upon the increase by the Board of the authorized number of Directors. A Director appointed to fill a vacancy shall serve the remaining term of his or her predecessor, or until a successor has been appointed and qualified.

G. Compensation of Directors

Directors shall serve without compensation. However, the Board may approve reimbursement of a Director's actual and necessary expenses while conducting ACSI business.

III. PRINCIPAL OFFICE

ACSI's principal office shall be at the ACSI registered office as noted in the Articles of Incorporation, or at such other place as the Board may select by resolution or amendment of the Bylaws. The Secretary shall note any change in principal office on the copy of the bylaws maintained by the secretary.

IV. MEETINGS OF THE BOARD

A. Place of Meetings

Board Meetings shall be held at ACSI's principal office or at any other reasonably convenient place as the Board may designate and in compliance with the Idaho Open Meetings Law, Idaho Code §§ 74-201 through 74-208.

B. Annual Meetings

An Annual Meeting shall be held the regular meeting date in July of each year, or at such other date as determined by the Board, for the purpose of installing Directors, electing officers, making and receiving reports on corporate affairs, and transacting other business as comes before the meeting.

C. Regular Meetings

Regular Meetings shall be held on the second Wednesday of the month, or at such other date as determined by the Board, at the principal office and shall be open to the public. With proper notice, the Chair may schedule regular meeting(s) for an alternate date to avoid holding meetings on holidays, to ensure the availability of a quorum of Directors, or for other valid cause.

D. Special Meetings

Special Meetings can be held at any time, called by the Chair or by any three Directors and shall comply with the Idaho Open Meeting Law.

E. Adjournment

A majority of the Directors present at a meeting, whether or not a quorum, may adjourn the meeting to another time and place. Notice of the time and place of holding an adjourned meeting need not be given to absent Directors if the time and place be fixed at the meeting adjourned, except if the meeting is adjourned for longer than 24 hours. Notice of the adjournment shall be given as specified in these Bylaws.

F. Notices

Notices of Board Meetings shall be given as required by the Idaho Open Meeting Law.

G. Waiver of Notice

Notice of a meeting need not be given to a Director who signs a waiver of notice or written consent to holding the meeting or an approval of the minutes of the meeting, whether before or after the meeting, or attends the meeting without protest prior to the meeting or at its commencement, of the lack of notice. The Secretary shall incorporate all such waivers, consents and approvals into the minutes of the meeting.

H. Meeting Agendas.

Meeting agendas shall be created, amended and posted in accordance with the Idaho Open Meeting Law.

V. ACTIONS BY THE BOARD

A. Quorum

A quorum consists of a majority of the fixed number of voting Directors.

B. Action by the Board

1. Actions Taken at Board Meetings. The actions taken and decisions made by a majority of the voting Directors present at a meeting duly held at which a quorum is present are the actions and decisions of the Board, except for the purposes of appointing committees and delegating authority thereto, or amending ACSI's Bylaws, where the action of a majority of voting Directors then in office is required by Chapter 52, Title 33, Idaho Code or as set out in these Bylaws. The Board may continue to transact business at a meeting at which a quorum was originally present, even though Directors withdraw, provided that any action taken is approved by at least a majority of the quorum required.
2. Board Meeting by Telecommunication Devices. Directors may participate in a Board meeting through use of telecommunication devices, so long as all Directors, participating in such meeting can hear one another. Participation in a meeting pursuant to this section constitutes presence in person at such meeting. All board

meetings conducted by telephone conference call shall fully comply with the Idaho Open Meeting Law.

C. Committees

1. Appointment of Committees. The Board may appoint one or more Board Committees by vote of the majority of Directors. A Board Standing Committee will consist of at least one Director, who shall serve at the pleasure of the Board.
2. Authority of Board Committees. The Board may delegate to a Board committee any of the authority of the Board, except with respect to:
 - a. the filling of vacancies on the Board or any committee which has the authority of the Board.
 - b. the amendment or repeal of any Board resolution.
 - c. the amendment or repeal of Bylaws or the adoption of new Bylaws.
 - d. the appointment of other committees of the Board, or the members of the committees.
 - e. the expenditure of corporate funds to support a nominee for Directors.
 - f. the approval of any self-dealing transaction, as defined by Chapter 52, Title 33, Idaho Code.
3. Procedures of Committees. The Board may prescribe the manner in which the proceedings of any Board Committee are to be conducted. In the absence of such prescription, a Board Committee may prescribe the manner in which the proceedings of its committee are conducted, except that the regular and special meetings of the Committee are governed by the provisions of these Bylaws with respect to the calling of meetings.

D. Standard of Care

1. Performance of Duties. Each Director shall perform all duties of a Director, including duties on any Board Committee, in good faith, in a manner the Director believes to be in ACSI's best interest and with such care, including reasonable inquiry, as an ordinary prudent person in a like position would use under similar circumstances.
2. Reliance on Others. In performing the duties of a Director, a Director shall be entitled to rely on information, opinions, reports or statements, including financial statements and other financial data, presented or prepared by:
 - a. one or more officers or employees of the corporation whom the Directors believes to be reliable and competent in the matters presented;
 - b. legal counsel, independent accountants or other persons as to matters that the Director believes are within that person's professional or expert competence; or
 - c. a Board Committee on which the Director does not serve, as to matters within its designated authority, provided the Director believes the Committee merits confidence and the Director acts in good faith, after reasonable inquiry when the

need is indicated by the circumstances, and without knowledge that would cause such reliance to be unwarranted.

3. Investments. In investing and dealing with all assets held by ACSI for investment, the Board shall exercise the standard of care described above and avoid speculation, looking instead to the permanent disposition of the funds, considering the probable income, as well as the probable safety of ACSI's capital. The Board may delegate its investment powers to others, provided that those powers are exercised within the ultimate direction of the Board. No investment violates this section where it conforms to provisions authorizing such investment contained in an instrument or agreement pursuant to which the assets were contributed to ACSI.

E. Participation in Voting

A quorum of the board consists of a majority of the Directors in office immediately before a meeting begins. The action of the majority of the Directors present at a meeting at which a quorum is present shall be the action of the Board. A majority of the committee members fixed and appointed by the Board shall constitute a quorum for the transaction of business at a meeting of such committee. The action of the majority of the committee members present at a meeting at which a quorum is present shall be the action of the committee.

F. Executive Sessions

Executive sessions may be held during any meeting after the presiding officer has identified the authorization under this act for the holding of such executive session pursuant Idaho Code Section 74-206. Every Director has a duty to maintain the confidentiality of all Board executive session deliberations, and discussions. Any Director violating this confidence may be removed from the Board.

No executive session may be held for the purpose of taking any final action or making any final decision.

VI. OFFICERS

A. The Officers of ACSI consist of a President (hereinafter "Chair"), Vice President (hereinafter "Vice Chair"), a Secretary and a Treasurer. The Secretary position may be filled by the Board clerk. ACSI also may have such other officers as the Board deems advisable.

1. Chair. Subject to Board control, the Chair has general supervision, direction and control of the affairs of ACSI, and such other powers and duties as the Board may prescribe. If present, the Chair shall preside at Board meetings. The Chair shall be a voting director.
2. Vice Chair. If the Chair is absent or disabled, the Vice Chair shall perform all the Chair's duties and, when so acting, shall have all the Chair's powers and be subject to the same restrictions. The Vice Chair shall have other such powers and perform other such duties as the Board may prescribe. The Vice Chair shall be a voting director.

3. Secretary. The Secretary shall:
 - a. keep or cause to be kept, at ACSI's principal office, or such other place as the Board may direct, a book of minutes of all meetings of the Board and Board Committees, noting the time and place of the meeting, whether it was regular or special (and if special, how authorized), the notice given, the names of those present, and the proceedings. The book of minutes may be kept electronically;
 - b. keep or cause to be kept a copy of ACSI's Articles of Incorporation and Bylaws, with amendments;
 - c. give or cause to be given notice of the Board and Committee meetings as required by the Bylaws; and
 - d. have such other powers and perform such other duties as the Board may prescribe.

4. Treasurer. The Treasurer shall:
 - a. keep or cause to be kept adequate and correct accounts of ACSI's properties, receipts and disbursements;
 - b. make the books of account available at all times for inspection by any Director;
 - c. deposit or cause to be deposited ACSI's monies and other valuables in ACSI's name and to its credit, with the depositories the Board designates;
 - d. disburse or cause to be disbursed ACSI's funds as the Board directs;
 - e. render to the Chair and the Board, as requested but no less frequently than at the beginning of each quarter, an account of ACSI's financial transactions and financial condition;
 - f. prepare annual financial report and budget;
 - g. to cause to be made a full and complete audit of the financial statements of the school as required in section 67-450B, Idaho Code. The auditor shall be employed on a written contract. One (1) copy of the audit report shall be filed with the state department of education, after its acceptance by the board of Directors, but not later than the timelines established by Idaho law or rule;
 - h. prepare any reports on financial issues required by an agreement on loans; and
 - i. have such other powers and perform such other duties as the Board may prescribe.

B. Election, Eligibility and Term of Office

1. Election. The Board shall elect the officers annually at the Annual Meeting or a Regular Meeting designated for that purpose or at a Special Meeting called for that purpose, except that officers elected to fill vacancies shall be elected as vacancies occur.
2. Eligibility. A Director may hold any number of offices, except that neither the Secretary nor Treasurer may serve concurrently as the Chair.

3. Term of Office. Each officer serves at the pleasure of the Board, holding office until resignation, removal or disqualification from service, or until his or her successor is elected.

C. Removal and Resignation

The Board may remove any officer, either with or without cause, at any time. Such removal shall not prejudice the officer's rights, if any, under an employment contract. Any officer may resign at any time by giving written notice to ACSI, the resignation taking effect on receipt of the notice or at a later date specified in the notice.

VII. ADVISERS TO THE BOARD

A. Appointment of Advisers

The Board may utilize advisers to provide advice to the Board on items on which the adviser has particular skill, education or expertise. Advisers are not board members and do not have authority to make decisions on behalf of the Board or ACSI. Advisers are appointed by a majority vote of the Board.

B. Duties

Advisers serve at the will and pleasure of the Board and perform such duties as directed by the Board. They may seek general advice from an adviser or direct the adviser to research and provide certain information. An adviser has no independent authority but performs only those roles and duties specifically assigned by the Board.

C. Attendance at Board Meetings

Advisers will attend Board meetings as assigned by the Board. Advisers should attend at least one regular Board meeting each quarter to report on the roles and duties assigned, but may attend additional meetings as requested. At the discretion of the Board, written reports may substitute for physical attendance at Board meetings.

D. Removal and Resignation

The Board may remove any adviser, either with or without cause, at any time by majority vote of the Board. Any adviser may resign at any time by giving written notice to the Board, the resignation taking effect on receipt of the notice or at a later date specified in the notice.

VIII. NON-LIABILITY OF DIRECTORS

The Directors shall not be personally liable for ACSI's debts, liabilities, or other obligations.

IX. INDEMNIFICATION OF CORPORATE AGENTS

ACSI may, in accordance with Idaho Code §30-30-623t, indemnify any Director, officer, or employee of ACSI against expenses actually and reasonably incurred in connection with the defense of any action, suit or proceeding, whether civil, criminal, administrative or

investigative, in which such person is made a party, or is threatened to be made a party, by reason of being or having been an officer, except in relation to matters as to which such person is judged to be liable for willful misconduct in the performance of such person's duties to ACSI.

All officers and directors of ACSI shall comply with the general standards of conduct contained in Idaho Code § 30-30-623.

X. INSURANCE FOR CORPORATE AGENTS

The Board may adopt a resolution authorizing the purchase and maintenance of insurance on behalf of any Director, officer, employee or other agent of ACSI, against any liability other than for violating provisions of laws relating to self-dealing asserted against or incurred by the agent in such capacity or arising out of the agent's status as such, whether or not ACSI would have the power to indemnify the agent against such liability under the provisions of the Idaho Charter Schools Act.

XI. SELF-DEALING TRANSACTIONS

Except as may otherwise be provided by the Act or the Articles, no contract or other transaction between ACSI and one or more of the Directors or any other corporation, firm, association or entity in which a Director of ACSI has an interest shall be voided of doing business with ACSI subject to the provisions section 33-5204 and 33-507 or other relevant sections of Idaho Code.

XII. OTHER PROVISIONS

A. Fiscal Year

The fiscal year of ACSI begins on July 1st of each year and ends on June 30th of the following year.

B. Execution of Instruments

Except as otherwise provided in these Bylaws, the Board may adopt a resolution authorizing any officer or agent of ACSI to enter into any contract or execute and deliver any instrument in the name of, or on behalf of ACSI. Such authority may be general or confined to specific instances.

Unless so authorized, no officer, agent, or employee shall have any power to bind ACSI by any contract or engagement, to pledge ACSI's credit, or to render it liable monetarily for any purpose or any amount.

C. Checks and Notes

Except as otherwise specifically provided by the Board (via majority vote at a public meeting or by resolution), checks, drafts, promissory notes, orders for the payment of money, and other evidence of indebtedness of ACSI may be signed by the Chair, Treasurer or designated ACSI administrator.

D. Construction and Definitions

Unless the context otherwise requires, the general provisions, rules of construction, and definitions contained in the Idaho Charter Schools Act and Idaho Nonprofit Corporation Act shall govern the construction of these Bylaws. Without limiting the generality of the foregoing, words in these Bylaws shall be read as the masculine or feminine gender, and as the singular or plural, as the context requires, and the word "person" includes both a corporation and a natural person. The captions and headings in these Bylaws are for conveniences for reference only and are not intended to limit or define the scope or effect of any provisions.

E. Conflict of Interest

Any Director, Officer, key employee, or committee member having an interest in a contract, other transaction or program presented to or discussed by the Board or Board Committee for authorization, approval, or ratification shall make a prompt, full and frank disclosure in writing of his or her interest to the Board or committee prior to its acting on such contract or transaction. Such disclosure shall include all relevant and material facts known to such person about the contract or transaction which might reasonably be construed to be adverse to ACSI's interest. The body to which such disclosure is made shall thereupon determine, by majority vote, whether the disclosure shows that a conflict of interest exists or can reasonably be construed to exist. If a conflict is deemed to exist or can be reasonably construed to exist, such person shall not vote on, nor use his or her personal influence on, nor be present during the discussion or deliberations with respect to, such contract or transaction (other than to present factual information or to respond to questions prior to the discussion). Each of the Directors and the Board of Directors shall at all times comply with the Ethics in Government Act, Idaho Code sections 74-401 *et seq.* and shall comply with the General Standards for Directors, Idaho Code section 30-30-623. The minutes of the meeting shall reflect the disclosure made, the vote thereon and, where applicable, the abstention from voting and participation. The Board may adopt conflict of interest policies requiring:

- a. regular annual statements from Directors, officers, key employees to disclose existing and potential conflict of interest; and
- b. corrective and disciplinary actions with respect to transgressions of such policies.

For the purpose of this section, a person shall be deemed to have an "interest" in a contract or other transaction if he or she, or a spouse is the party (or one of the parties) contracting or dealing with ACSI, or is a director, trustee or officer of, or has a significant financial or influential interest in the entity contracting or dealing with ACSI.

F. Interpretation of Charter

Whenever any provisions of these Bylaws are in conflict with the provisions of the Charter, the provisions of these Bylaws control.

XIII. AMENDMENT


A majority of Directors may adopt, amend or repeal these Bylaws at any regularly scheduled or special meeting of the Board with appropriate public notice as required herein.

The foregoing Bylaws were regularly adopted by the Board of Directors of AMERICAN CLASSICAL SCHOOLS OF IDAHO, INC. at the meeting of the Board of Directors held on the seventh day of September 2022.


Chairman of the Board

CERTIFICATE OF SECRETARY

The undersigned does hereby certify that the undersigned is the Secretary of the American Classical Schools of Idaho, a nonprofit corporation duly organized and existing under the laws of the State of Idaho, that the foregoing Bylaws of said corporation were duly and regularly adopted as such by the Board of Directors of said corporation, whose Directors are the only members of said corporation; and that the above and foregoing Bylaws are now in full force and effect.


Secretary of the Board

APPENDIX SERIES D: BOARD OF DIRECTORS AND PETITIONING GROUP

John Bassetti johnbassetti@gmail.com

Profile: Multidisciplinary leader with combined expertise in information technology, engineering and construction. Driving passion for melding thoughtful strategic planning with multidisciplinary knowledge teams to raise organizational processes and activities up the value chain.

Associations

- President, Construction Information Executives (CIE), 2016-2018.
- Member, Information Systems Audit and Control Association (ISACA).
- Elected Official, Alameda County Central Committee representing Oakland and Berkeley, 2016-2018.

Employment

Stratagroup, IT Auditor, 2020-Present

- Provide technology audit and organizational risk assessment services of internal projects within the engineering and construction space.
- Assess controls, records and procedures for effectiveness and perform subsequent remediation and support.

Pankow Builders, IT Director, 2009-2020

- Leadership in key initiatives including foundational infrastructure enhancements and ERP evaluation and implementation.
- Authored critical analysis of and strategic goals for cross-functional process optimization and IT governance enhancements.
- Optimized team resources to ensure maximum engagement with organizational goals and strategies.
- Developed future state employee profiles and facilitating organizational and departmental transition.
- Facilitated internal security transformation and enhancing organization-wide security posture.
- Oversaw \$4+ Million G&A budget.

Pankow Builders, IT Manager, 2006-2009

- Responsible for departmental expansion and staff career development, performance management and mentoring.
- Created conceptual framework and built consensus for multi-departmental optimization of information and staff from separate functional areas.
- Served as project, schedule and cost manager for multiple IT projects involving both internal staff and external vendors.
- Oversaw all Information Technology elements of a \$500+ Million commercial builder with 5 offices and 30+ active jobsites on West Coast and Hawaii.
- Served in a leadership role in building the initial business case and advancing LEED and sustainability practices within the company.

Pankow Builders, IT Systems Engineer, 2001-2004

- Helpdesk and technical support services for 300+ engineering and support staff.
- Lifecycle setup and ongoing technical management and maintenance of jobsite field offices.
- Network infrastructure setup, configuration and maintenance.

Environmental Resources Management, Geologist, 1997-2001

- Perform Phase I and Phase II Environmental Site Assessments for multinational oil and gas clients, airlines and chemical companies.
- Merger and acquisition support for public and private sector clients.
- Provide on-site management of small to medium scale field investigations with staff and equipment in complex and often hazardous work environments.

Education

- Master of Sustainable Development, Macquarie University, 2005.
- Bachelor of Arts, Geology, Youngstown State University, 1997.

RUTH DAVID

| rdavid@idahonovus.org |

LANGUAGES Mandarin, English

EDUCATION | 1996 - BOISE STATE UNIVERSITY

Bachelor of Science in Nursing

1991 – SAN JOSE STATE UNIVERSITY

Bachelor of Arts in Industrial and Organizational Psychology

EXPERIENCE | 2020 - Current: Founding Board Chair – Idaho Novus Classical Academy, Boise ID

- Leading the founding team and partnering with entities to open a Hillsdale K-12 school in 2024 at Avimor community
- Received the 501 C (3) status from the IRS

2017 - 2020: Board of Directors– Compass Public Charter, Boise ID *

- Advocate for students, staff and leadership to maintain educational integrity and school culture/vision
- Supported fiscally responsible expenditure of funds
- Bridged communication gap between stakeholders, students, staff and leadership team
- Solicited local business support
- Worked with parents to promote school spirit/culture
- Initiated Annual Compass Hero Award to recognize outstanding individual at Compass

2004 - Current: School and church volunteer, Boise ID

- Teacher's assistant in math and language arts
- Fundraising, school spirit and culture promotion activities, boosting staff morale through personalized celebration and recognition
- Led women's bible study. AWANA and nursery assistant

1996 – 2002: Registered Nurse – ST Luke's Regional Medical Center, Boise ID

- Registered Nurse at Mother/Baby Unit.

1995 - 1996: Administrative Secretary – Applied Materials, Santa Clara CA

- Supported the Director of Intellectual Properties

1994: Bookkeeper – United Cerebral Palsy of Idaho, Boise ID

- Responsible for all accounting process; assisted in client service and fund raising.

1991 - 1993: Sr Quality Systems Data Admin – Xicor Inc, Milpitas CA

- Assistant to the Quality Systems Manager

Marv Lasnick

mlasnick@kapextechnology.com

Owner/CEO

Kapex Technology LLC, Fruitland, ID, Feb. 2022 to Present

- Created a software development company to focus on providing quality custom software solutions that are affordable for any business, large or small. Our expertise is delivering SaaS solutions with mobile and web clients utilizing local and offshore engineers. We've worked in several industries including Healthcare, HR, FinTech, and AgTech.

Chief Technology Officer

True Care LLC & Jobu Vetting LLC Boise, ID, Apr 2017 to Jan 2022

- Hired and managed a team of engineers, both local and offshore, who developed and took two products to market. I was responsible for all technology strategies, product roadmaps, and communication with clients, partners, investors, and other stakeholders as necessary.

Project Management Office Manager

Micron Technology, Inc. Boise, ID, 2007 to 2017

- Co-founded an enterprise PMO in 2014 which focused on improving end to end enterprise level processes for Micron's product groups. I co-founded a corporate PMO in 2007 which connected several department portfolio processes, and I founded the IT project management office which supported the global IT organization and established a portfolio process to manage all project demand for IT which in the first cycle resulted with a reduction of 450 active projects to approximately 80. I was also a recipient of Micron's company-wide 'suggestion of the quarter' award.

IT Central Team Manager

Micron Technology, Inc. Boise, ID, 2003–2007

- Established the Central Team manager role charted to align worldwide IT operations and led a team through internal analysis of how to globalize Micron's IT department.

Department Manager - Corporate Products and Tools

Micron Technology, Inc. Boise, ID, 1999–2003

- Directed an organization of 58 professionals tasked with providing enterprise-wide IT services that included: e-mail, paging, document management, incident tracking, web services, directory services, EDI systems, reporting services, and systems programming. Extensive vendor management experience, including maintenance contracts, implementation service agreements, and purchase agreements; and participated on many successful task force teams, such as: Sarbanes Oxley, business continuity, M&A, and corporate IT release process.

EDUCATION & TRAINING

- BBA, Computer Information Systems, Boise State University, Boise, Idaho
- Management Development Program, Boise State University
- Certified process consultant coach, Kepner/Tregoe
- ADKAR Change Management, Prosci
- Certified ITIL process documentation practitioner, Pink Elephant

COMMUNITY INVOLVEMENT

- Founding Board Member and Current Board Chair of Treasure Valley Classical Academy Charter School – Fruitland, ID
- Board Chair of American Classical Schools of Idaho
- Boise Optimist Football assistant coach for two years and head coach for one
- Assistant lacrosse coach for four years

TERENCE R. RYAN

Boise, ID 83702 | [REDACTED] | tryan@bluum.org & tryan@idahocsn.org

PROFESSIONAL EXPERIENCE

CEO

BLUUM | BOISE, IDAHO

2013 – Present

- Lead Idaho's '20 in 10' Initiative to double the number of students in Idaho's high- performing charter schools.
- Lead Idaho's federal CSP grant of \$22 million.
- Coordinate Idaho's CSP consortium of Idaho State Board of Education, Idaho Public Charter School Commission, Building Hope and the J.A. and Kathryn Albertson Family Foundation.
- Set and coordinate with Bluum Board of Trustees the organizational strategy and markers for success of the 501c3 statewide charter support organization.
- Oversee day-to-day operations (\$1.9 million operating budget) and ensure the fiscal health of organization.
- Coordinates closely all activities with funders including J.A. & Kathryn Albertson Family Foundation (JKAF), Charter School Growth Fund, New Schools Venture Fund and Louis Calder Family Foundation.
- Invest new school grant dollars (\$6 million annually) in those models and partners that offer the greatest likelihood of success (e.g. student achievement gains and sustainability).
- Create the conditions for the successful expansion of high-performing schools in Idaho.
- Lead, support and develop staff, consultants and key stakeholders.
- Coordinate closely with partners like Building Hope, National Alliance for Public Charter Schools, Idaho State Board of Education, Idaho Public Charter School Commission and others to build and expand Idaho's new school sector.
- Build brand recognition (in Idaho and beyond) for BLUUM.
- Coordinate and negotiate all research efforts with partners like Public Impact, Bellwether, FDR Group, and EcoNorthwest.
- Share Idaho's, and rural education more generally, stories and challenges with national education organizations and media. This includes writing op-eds and being quoted widely in newspapers and new media in Idaho and nationally.
- Represent Idaho's new school sector at state and national debates, forums and conferences.

VICE-PRESIDENT FOR OHIO PROGRAMS AND POLICY

THOMAS B. FORDHAM FOUNDATION AND INSTITUTE | WASHINGTON, DC & DAYTON, OHIO 2001 – 2013

- Served as Fordham's senior staff person in Ohio, including recruiting, hiring, and managing all staff.
- Worked with Fordham's board of trustees, the Fordham Ohio Committee and senior leadership to develop, plan, and lead Fordham's Ohio policy and research agenda.
- Engaged the governor's office, legislative leadership, state board of education members, and Ohio Department of Education officials to craft public policies and legislation that better served Buckeye State PK-12 education and would lead to increased student achievement.

Page 1 of 3

- Collaborated with philanthropy, business, education, higher education and other influential leaders across Ohio on issues ranging from school choice policies, to teacher quality issues, to standards and accountability, to school funding.
- Launched and led Fordham's efforts as a charter school authorizer responsible for eight schools educating over 2,000 students.
- Identified, recruited and managed national experts to assist Ohio research, projects and events.
- Raised external grant dollars from national and state funders for research projects, public events and other policy-oriented activities. Raised over \$3 million dollars for Ohio efforts.
- Created and managed coalitions of statewide partners for specific school improvement efforts.
- Communicated with, and influenced, editorial boards, journalists, education bloggers and other news media.
- Testified to the Ohio Senate and House on pressing education issues.
- Presented to education groups, students, and reform groups in Ohio and across the country.
- Partnered with district school superintendents, county education officials and others to improve Ohio's charter school quality and human capital pipelines.
- Allied with like-minded reform organizations in other states (PIE-Net and CEE-Trust).
- Co-authored Ohio's *Education Reform Challenges: lessons from the frontlines* (Palgrave- MacMillan, July 2010) with Chester E. Finn, Jr. and Michael B. Lafferty.

PROGRAM DIRECTOR AND SENIOR RESEARCHER

21ST CENTURY LEARNING INITIATIVE | RESTON, VA & BATH, ENGLAND

1996 – 2001

- Led Initiative research and training efforts.
- Worked closely with a group of international education researchers, scientists, policy makers, academics, and business leaders to generate a synthesis on human learning that became the basis of two books, numerous articles, and public presentations.
- Briefed lawmakers, policy leaders and education reformers on the findings of the Initiative in the United States, Canada, the United Kingdom, and other countries.
- Testified to the Educational Policy Unit at 10 Downing Street in London.
- Developed and maintained the Initiative's web site and external communications.
- Organized and managed the organization's finances.
- Co-authored *The Unfinished Revolution: Learning, Human Behavior, Community and Political Paradox*; this book was published in the United States by ASCD Press, and in the United Kingdom by Network Educational Press Ltd. (2001).

PATERSON FELLOW/AMERICAN FEDERATION OF TEACHERS INTERNATIONAL FELLOW

THE FOUNDATION FOR EDUCATION FOR DEMOCRACY | WARSAW, POLAND

1994 – 1995

- Worked with Foundation Leadership, the Polish Ministry of Education, and the US Embassy to organize and convene an international conference on "Education and the Transition to Democracy."
- Developed the organizational capacities of the Foundation by raising external grant dollars, helping set-up accounting systems and processes for tracking and reporting grant dollars from Western foundations and governments.
- Represented the Foundation at public events hosted by foreign funding agencies and attended events sponsored by the US Ambassador to Poland; the German Embassy and other Western governments and agencies.
- Led fundraising training workshops for educators in Poland, Lithuania and Romania.

Page 2 of 3

- Taught High School English at the Goethe School in Warsaw.

EDUCATION

MASTER OF ARTS DEGREE, POLITICAL ECONOMY

Graduate School of International Studies | Denver, CO

1994

BACHELOR OF ARTS DEGREE IN HISTORY & ASSOCIATES DEGREE IN JOURNALISM

Eastern Illinois University | Charleston, IL

1990

AWARDS, RECOGNITIONS AND BOARDS/COMMISSIONS

- **Commissioner** | Council for Accreditation of Educator Preparation
- **Task Force Member** | Rural Opportunities Consortium of Idaho (ROCI)
- **Board Member** | Gem Innovation Schools, Idaho
- **Member** | National Alliance for Public Charter Schools State Leaders Council
- **Research Fellow** | The Hoover Institution
- **Fellow** | New Schools/Aspen Institute Fellowship, 2008
- **Board Member (former)** | School Choice Ohio
- **Fellow** | University of Denver's Paterson International Fellowship
- **Board Member** | Pathways in Education, Idaho
- **Board Member (founding)** | Education for All

Stacy Saylor

ssaylor@tvacademy.org

Education

*California State Polytechnic
University, Pomona*
**Bachelor of
Science/Communications - 1988**

Hipereon Banking School
Certificate in Commercial Credit and
Lending – 2005

Real Estate Salesperson
Licensed by the State of California
Department of RE Sales - 2009

Board Development for TVCA
Hillsdale College K-12 Education
November 10-13, 2021

Key Skills

Problem Solving
Basic Accounting
General budgeting
Effective communication
Leadership
Tax return analysis
Credit underwriting

Other Activities

Charter Start Workshop-Idaho
Attended Feb. 18-19, 2021

Treasure Valley Classical Academy
Finance Committee Volunteer 2021

*How to Save Money by Refinancing
Your Loan*
Webinar with

Mark Medema of the Charter School
Facility Center, 2021

Glenoaks Elementary School
Foundation (Board Member)
President: 2013-2015
Treasurer: 2006-2008

Profile

Business details: Analytical, energetic, detail-oriented self-starter with broad experience in business, banking and real estate matters, including buying/selling/renovating homes, commercial credit underwriting, simple accounting, budgeting, management, training and audit compliance.

Personal details: I fully support the mission of the Barney Charter School Initiative and am very excited to be involved with the start up of American Classical Schools of Idaho, Inc.

Background

My husband and I were interested in starting a Barney Charter School in Teton County, Idaho. We met with Mr. Lambert to learn more. During the discussion, we became aware there was one 6th grade opening at TVCA. We immediately applied for enrollment and purchased a second home in Payette to enroll our son at TVCA.

Experience

TVCA Board Member/Treasurer:

Finance Committee Chair and Capital Campaign Committee Member,
06/2022 to Present

TVCA Board Member

Finance Committee & Capital Campaign Committee Member, 06/2021 -
06/2022

Withdrew son from public school and home-schooled, 2017-2020

I contacted the Hillsdale Academy in Hillsdale, MI and they were kind enough to send me their curriculum. My husband and I used that curriculum to home school grades 3-6 until we found Treasure Valley Classical Academy. We met with Mr. Lambert and knew at once that TVCA was the best possible choice for our son's education.

The Saylor Corp, 2009-2018

I formed a C-Corp to purchase, renovate and sell homes. I obtained my real estate license, taught myself QuickBooks, Corporate Income Tax Preparation, Excel and took financial planning courses. In addition, I managed rental properties and vacation rentals.

Banking/Vice President, Credit Officer, Corporate Officer, 1988-2008

I began my career as a teller and worked every bank branch position through Vice President. **General duties:** Supervised 30+ employees, mentored/trained new managers, assisted other branches who had audit deficiencies, managed expenses/budgets, was a trusted corporate officer responsible for \$1m+ in cash/bank assets, commercial credit underwriting, managed a loan portfolio in excess of \$50m.

Mark C. Dillon
Major General, USAF (Retired)

Email: mark79dillon@gmail.com; [REDACTED]

Objective: Board advisor for American Classical Schools of Idaho (ACSI).



Current employment: Mark is the Strategic Accounts Manager, Air & Space Forces for Red Hat, Inc. He is also the President of Mark C Dillon, LLC. where he provides leadership, strategic planning, and education consulting services for multiple clients. General Dillon currently serves on two not-for-profit boards.

Previous employment: Prior to joining Red Hat, Mark served on the State of Hawaii Public Charter School Commission—the sole state authorizer—and was active on two of their five committees. Additionally, he advised Hillsdale College’s Barney Charter School Initiative leadership team, authored their strategic growth plan, and coached and mentored 18 principals and vice principals on leadership,

time management, business acumen, organizational culture, fundraising and human resource management.

General Dillon retired from the US Air Force in 2017 after 33 years of service. Mark’s final assignment was Deputy Joint Forces Air Component Commander US INDO-PACOM and Deputy Commander of the Pacific Air Forces, located at Joint Base Pearl Harbor-Hickam, Honolulu Hawaii. In these two roles he was responsible for the integrated air and missile defense of the US INDO-PACOM theater, the day-to-day oversight of \$50 billion in assets, and the organizing, training, and equipping of 46,000 Airmen located at nine installations in Alaska, Hawaii, Japan, South Korea & Guam.

Education and executive training: Mark is a graduate of Air Command and Staff College, Air War College, and the Joint Forces Staff College. He has attended the Air Force Enterprise Management Seminar, Center for Creative Leadership’s Senior Leader Executive Course, the Joint Task Forces Commanders Course, and Harvard University’s US-Russia Security Program. He has earned a Bachelor of Science degree in Aerospace Engineering from Arizona State University, master’s degree from Embry-Riddle University, and master’s degree in National Strategic Studies from Air University.

Other information: General Dillon’s military bio is available at:

<https://www.af.mil/About-Us/Biographies/Display/Article/108482/major-general-mark-c-dillon/>

Jon M. Fennell
Professor Emeritus

██████████
██████████
██████████
jfennell@hillsdale.edu

EDUCATION

University of Illinois, Urbana, Ph.D., Philosophy of Education

University of California, Davis, M.A., Social Foundations of Education

University of California, Davis, B.A., Political Science

Boise State University, Advanced Secondary Teacher's Certificate

ACADEMIC POSITIONS (HILLSDALE COLLEGE)

Dean of Social Sciences	2009-2016
Professor and Chairman of the Education Department	2005-2016
Assistant Professor of Education	1993-1995

IDAHO STATE DEPARTMENT OF EDUCATION

Consultant for Management Information	1976-1980
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CORPORATE EMPLOYMENT

RADIUS SOLUTIONS , Chicago, Illinois Vice President of Operations	2003-2005
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IONA TECHNOLOGIES , Naperville, Illinois District Manager, Global Services	2001-2002
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J.D. EDWARDS , Lombard, Illinois Director of Client Services Client Services Manager Client Manager	1999-2000 1997-1999 1995-1997
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JBA INTERNATIONAL , Livonia, Michigan Senior Consultant and Project Manager	1991-1993
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UNISYS CORPORATION , Blue Bell, Pennsylvania Product Marketing Manager Director, Unisys Business Television Network Manager, Product Launch Marketing Support Consultant	1984 -1991
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ASSOCIATED FOOD STORES , Boise, Idaho Information Technology Manager Systems Analyst	1980-1984
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Petitioning Group

Name	Title	Role
Mr. John Bassetti	ACSI Board Member	Board of Directors
Mrs. Ruth David	ACSI Board Member	Board of Directors
Mr. Marvin Lasnick	ACSI Board Member	Board of Directors
Mr. Terry Ryan	ACSI Board Member	Board of Directors
Mrs. Stacy Saylor	ACSI Board Member	Board of Directors
Dr. Jacob Francom	NICA Founding Principal	Principal, General Advisor
Mr. Stephen Lambert	ACSI Executive Director	Mission Advisor
Marc Carignan	Bluum Chief Financial Officer	Business Management Consulting

Fundraising Plan for North Idaho Classical Academy

Introduction

North Idaho Classical Academy (NICA) is a nonprofit organization committed to providing quality classical education to the community. To ensure a successful school startup and meet our initial financial needs, we have developed a comprehensive fundraising plan. NICA will offer tax credits to donors, provide acknowledgment letters for all contributions, and recognize major donors on a dedicated plaque within the school.

Fundraising Strategies

1. General Donations

- Tax Credits: Promote the tax benefits of donating to NICA as a nonprofit organization.
- Acknowledgment Letters: Provide formal acknowledgment letters to all donors for tax purposes.
- Major Donor Recognition: Offer recognition on a plaque within the school for donors contributing \$5,000 or more.

2. Startup Costs

- Our goal is to raise \$10,000 to cover startup costs, including incidentals, marketing, and various essential projects.

3. Project-Specific Donations

Community members and organizations can contribute to specific projects, with plaques honoring their contributions. The available projects for adoption include:

- a. Front Washington Building School Building Sign
 - i. Donation Amount: ~\$5,000
 - ii. Plaque: Place a plaque honoring the donor(s) at the front of the school building.
- b. Main Roadway School Sign
 - i. Donation Amount: ~\$5,000
 - ii. Plaque: Place a plaque acknowledging the donor(s) next to the main roadway school sign.
- c. Adopt a Classroom
 - i. Donation Amount: ~\$10,000

- ii. Plaque: Place a plaque inside the adopted classroom acknowledging the donor(s).
- d. Flagpole Area
 - i. Donation Amount: ~\$15,000
 - ii. Plaque: Place a plaque near the flagpole area acknowledging the donor(s).
- e. Display cases
 - i. Donation Amount: ~\$5,000
 - ii. Plaque: Place a plaque in the display cases area acknowledging the donor(s).
- f. Playground
 - i. Donation Amount: ~\$30,000
 - ii. Plaque: Place a plaque near the playground area acknowledging the donor(s).
- g. Adopt a Building
 - i. Donation Amount: ~\$5,000
 - ii. Plaque: Place a plaque inside the adopted building, featuring a picture, biography, and quotes of the founding father.
- h. Trail Around Property
 - i. Donation Amount: ~\$10,000
 - ii. Plaque: Place plaques along the trail acknowledging donors who contributed to its creation.

Fundraising Activities

- a. Online Fundraising Campaign: Launch an online crowdfunding campaign on platforms such as GoFundMe.
- b. Community Outreach: Engage with local businesses, community groups, and individuals through events, presentations, and networking to seek donations.
- c. Corporate Sponsorships: Approach local businesses for potential sponsorships or partnerships, offering advertising opportunities and recognition.
- d. Social Media Promotion: Utilize social media platforms to share updates, success stories, and donor recognition, encouraging online donations.

- e. Direct Mail Campaign: Send fundraising letters to potential donors in the local community, explaining NICA's mission and the importance of their support.
- f. Fundraising Events: Organize fundraising events, such as a gala, charity auction, or school fair, to engage the community and raise funds.
- g. Grant Applications: Research and apply for grants from foundations and organizations supporting educational initiatives.

Reporting and Accountability

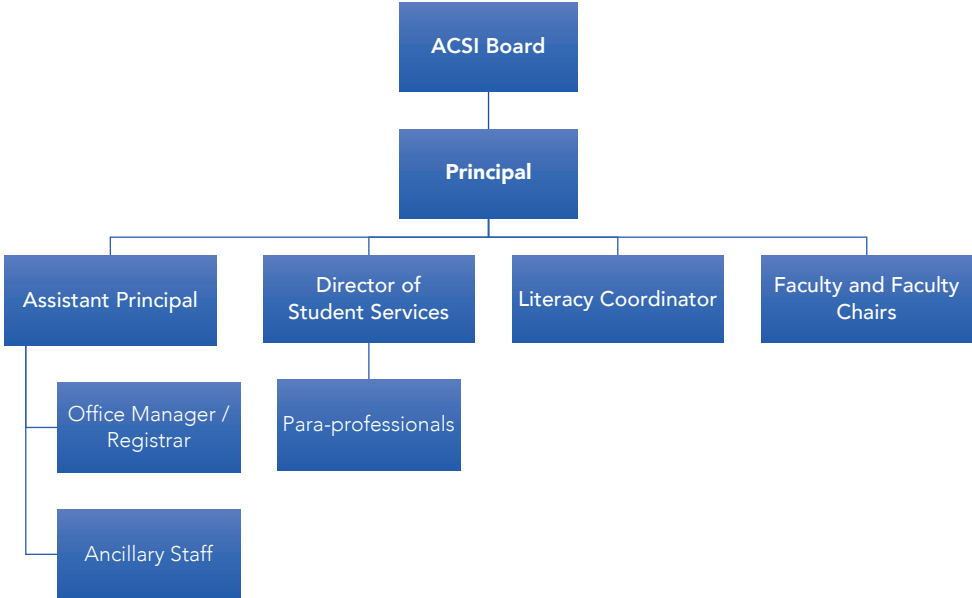
NICA will maintain transparency and accountability throughout the fundraising campaign by providing regular updates to donors on the progress of the fundraising efforts. Financial reports will be made available to donors upon request.

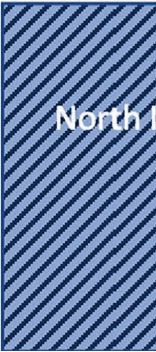
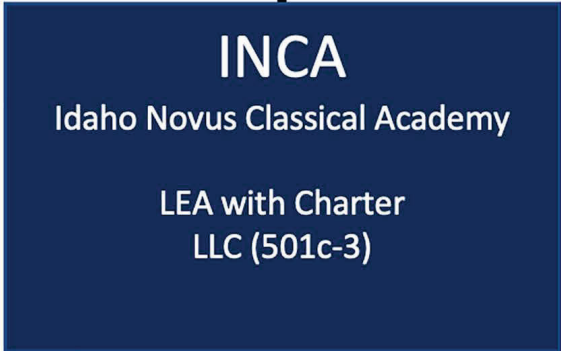
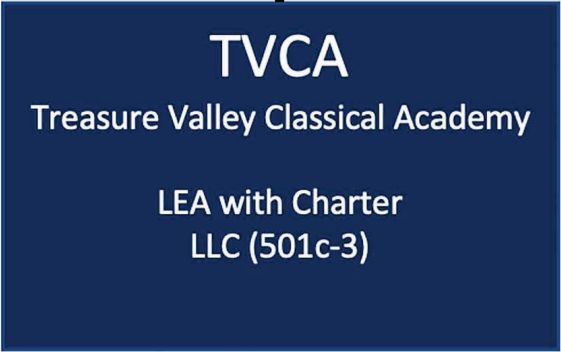
Conclusion

The success of North Idaho Classical Academy's startup depends on the support and contributions of our community members, businesses, and donors. By implementing this comprehensive fundraising plan, we aim to raise the necessary funds to cover our startup costs and provide a top-quality classical education for our students. We appreciate the generosity of our supporters and look forward to acknowledging their contributions.

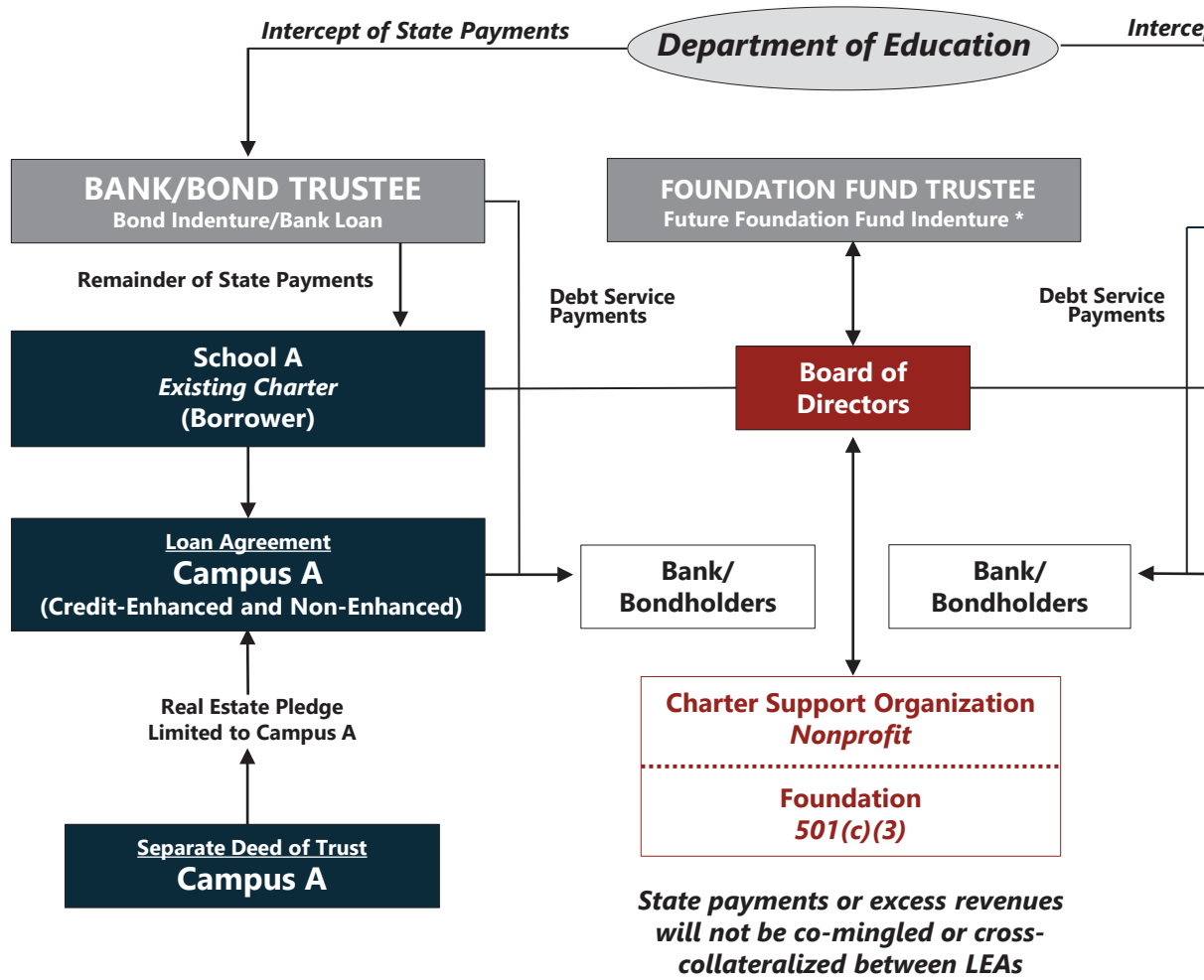
**APPENDIX SERIES E:
ADMINISTRATION AND
ORGANIZATION**

Initial Leadership Framework (K-6)





SECURITY AND FLOW OF FUNDS – Two Separate Charters



* Amounts deposited, if any, under the foundation fund indenture may be used by member schools as additional security for Campus B bonds from sources unrelated to a specific campus (solely from philanthropy to support ACSI schools). Excludes money related to state payment.



DR. JACOB A. FRANCOM

EDUCATIONAL LEADER

CONTACT

- Post Office Box 297
Troy, Montana 59935
- +1 406 293 1080
- jacob.francom@gmail.com

EDUCATION

Doctorate of Education in Educational Leadership

University of Montana
December 2013

Master of Education in Educational Leadership

University of Montana
December 2009

Master of Arts in Russian

University of Arizona
May 2006

Bachelor of Science in Composite Teaching – Physical Science

Utah State University
May 2002

WORK EXPERIENCE

Idaho New School Fellow

July 2023 – Current

Bonnars Ferry, Idaho

The fellowship, by Bluum and the J.A. and Kathryn Albertson Family Foundation, is to support leaders to develop and launch an effective, innovative, and financially sustainable public charter school.

District Superintendent

July 2013 – July 2023

Troy Public Schools

Obtained over \$3,500,000 in grants for school and facility improvements.

Partnered with neighboring school district to establish first charter program in Montana to promote vocational training.

Led district through rigorous accreditation and district improvement process. The system accreditation and improvement process included all stakeholders, concluded with full accreditation status, and the development of a comprehensive strategic plan.

Principal

W.F. Morrison Elementary

August 2018 – 2022

Restructured the course schedules and timetables to maximize instructional time and increase student outcomes.

Led the school in the implementation of a new reading program that has improved student performance.

Troy Junior & Senior High School

August 2010 – 2018

Increased enrollment in running-start classes (college credit courses) from five to forty percent of the student body.

Implemented a robust intervention program and boosted graduation to over 94 percent.

Oversaw and coordinated the continual development, revision, and evaluation of curriculum.

Adjunct Professor

August 2017 – Current

University of Montana, EDUCATIONAL LEADERSHIP DEPARTMENT

Taught graduate courses for current and future school and district administrators.

Associate Director

March 2020 – Current

Array Global Educational Services

Supported international and national schools in their improvement and accreditation process.

Oversaw all marketing, finance, and business development procedures.

Associate Director

July 2017 – March 2020

AIAA – AMERICAN INTERNATIONAL ACCREDITATION ASSOCIATION OF SCHOOLS AND COLLEGES

Assisted in managing the accreditation process for schools and colleges.

Principal & Science Teacher

February 2006 – August 2010

Turning Winds Academic Institute

Improved curriculum and assessment strategies school-wide.

Oversaw state licensing procedures and school accreditations.

REFERENCES

Diane Rewerts

*Former Principal,
W.F. Morrison Elementary*

 +1 406 291 0372

 drewerts@troyk12.org

Dr. Parry Kero

*Educational Leadership Department,
University of Montana*

 +1 406 243 5623

 patty.kero@mso.umt.edu

Dr. Ray Lindley

*Executive Director,
Array Global Educational Services Inc.*

 +1 503 393 3030

 rlindley@arrayglobal.org

Sylvia Maffit

*Board Chair,
Troy Public Schools*

 +1 425 677 5429

 smaffit@frontier.com

OTHER PROFESSIONAL ACTIVITIES

State Representative

July 2012 – January 2018

NWAC / AdvancED

Lead and conducted school accreditation visits to schools across the state and nation.

Compiled detailed reports for accreditation visits.

Currently trained to lead both public and private accreditation visits through AdvancED.

AWARDS & RECOGNITION

No Kid Hungry Montana Award

2017

No Kid Hungry

Educational Leader of the Year

2016

University of Montana

Montana Principal of the Year

2015

National Association of Secondary School Principals

Montanan of the Week

September 2015

Named by U.S. Senator Daines

Montana School Board of the Year

September 2015

Montana Association of School Superintendents Association

APPENDIX SERIES G: LEA NOTIFICATION LETTERS


NORTH IDAHO

CLASSICAL ACADEMY
virtus > scientia > felicitas

August 3, 2023

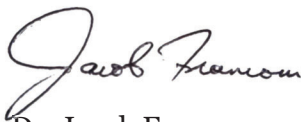
Superintendent Jan Bayer
Boundary County School District #101
7188 Oak Street
Bonners Ferry, Idaho 83805
jan.bayer@mail.bcsd101.com

Dear Superintendent Bayer,

I am writing to inform you of a planned charter school in the Bonners Ferry community. North Idaho Classical Academy (NICA) will open in August of 2025 and initially serve 210 students in grades K-6. One grade will be added in each subsequent year until NICA is a K-12 school serving 390 students. The school will operate as an American Classical School utilizing the curriculum developed by the Hillsdale College Office of K-12 Education. The mission of North Idaho Classical Academy is to train the minds and improve the hearts of students through a classical, content-rich curriculum that emphasizes virtuous living, traditional learning, and civic responsibility.

Following a thorough review of attendance boundaries, we determined that our primary attendance zone intersects with your school district. A copy of the petition is included alongside this letter for your review. Our intent is to submit a petition to the Idaho Public Charter School Commission exactly four weeks following the date of this letter. I will gladly discuss the petition with you and answer any questions you might have. You can reach me directly at jfrancom@nicak12.org I would be grateful for an expedited response, if possible.

Respectfully,



Dr. Jacob Francom
Founding Principal



Jacob Francom <jfrancom@nicak12.org>

North Idaho Classical Academy

Jan Bayer <jan.bayer@mail.bcsd101.com>

Thu, Aug 17, 2023 at 11:08 AM

To: jfrancom@nicak12.org

Cc: Stephen Lambert <slambert@acs-id.org>, Marvin Lasnick <mlasnick@acs-id.org>

Thank you for the information. I will review, share with the school board, and reach out if I have any questions.

Have an amazing day!

[Quoted text hidden]

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With gratitude,
Jan Bayer
Superintendent

CONFIDENTIALITY AND SIGNATURE NOTICE: This email, and any attachments, may contain information that is privileged, confidential and/or protected from disclosure under applicable law, and nothing contained therein shall be deemed to waive or diminish the protections afforded by such laws. **Do not:** (i) deliver, distribute, copy or disclose this transmission or its contents to any third party or business entity; or (ii) produce a copy of this e-mail in connection with any litigation without the advice of any attorney; or (iii) take any action in reliance on the information it contains. Printed copies of this e-mail should not be kept in your regular files. If you are not an intended recipient of this transmission, please notify the sender immediately and delete the original message without making any copies. Nothing in this communication is intended to constitute an electronic signature, unless a specific statement to the contrary is included in this communication.


NORTH IDAHO
CLASSICAL ACADEMY
virtus > scientia > felicitas

August 3, 2023

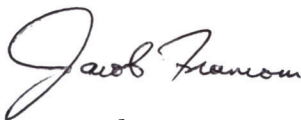
Superintendent Dr. Becky Meyer
Lake Pend Oreille School District #84
901 Triangle Drive
Ponderay, Idaho 83852p
becky.meyer@lposd.org

Dear Superintendent Meyer,

I am writing to inform you of a planned charter school in the Bonners Ferry community. North Idaho Classical Academy (NICA) will open in August of 2025 and initially serve 210 students in grades K-6. One grade will be added in each subsequent year until NICA is a K-12 school serving 390 students. The school will operate as an American Classical School utilizing the curriculum developed by the Hillsdale College Office of K-12 Education. The mission of North Idaho Classical Academy is to train the minds and improve the hearts of students through a classical, content-rich curriculum that emphasizes virtuous living, traditional learning, and civic responsibility.

Following a thorough review of attendance boundaries, we determined that our primary attendance zone intersects with your school district. A copy of the petition is included alongside this letter for your review. Our intent is to submit a petition to the Idaho Public Charter School Commission exactly four weeks following the date of this letter. I will gladly discuss the petition with you and answer any questions you might have. You can reach me directly at jfrancom@nicak12.org I would be grateful for an expedited response, if possible.

Respectfully,



Dr. Jacob Francom
Founding Principal

North Idaho Classical Academy

Dr. Becky Meyer <becky.meyer@lposd.org>

Mon, Aug 21, 2023 at 4:11 PM

To: jfrancom@nicak12.org

Cc: Stephen Lambert <slambert@acs-id.org>, Marvin Lasnick <mlasnick@acs-id.org>, Kelly Fisher <kelly.fisher@lposd.org>

Dr. Francom,

Thank you for email - I appreciate you reaching out. I will pass along a Cc of your petition to our Board of Trustees as an FYI. Plse let me know if you need anything further from the LPOSD. Thanks, bwm

Becky W. Meyer, Ph.D.*Lake Pend Oreille School District Superintendent**Region 1 Superintendent President*(208) 263-2184 · www.lposd.org**EVERY STUDENT, EVERY DAY!**

[Quoted text hidden]

APPENDIX SERIES H: ADDITIONAL DOCUMENTS

HILLSDALE COLLEGE

K-12 Curriculum

An American Classical Education

Kindergarten

1

MATH

SCIENCE

LITERATURE

Kindergarten

Year at a Glance

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH
LITERACY Literacy Essentials	Weeks 1-6	Weeks 7-10	Weeks 11-14	Weeks 15-16	Weeks 17-20	Weeks 21-24	Weeks 25-28
LITERATURE Include ~5 poems each month	Three Billy Goats Goldilocks Three Little Pigs	The Wolf and the Seven Little Kids Aesop's Fables	Red Riding Hood King Midas Beatrix Potter	The Velveteen Rabbit	The Legend of Jumping Mouse How Many Spots? Tug-of-War	Snow White Cinderella Casey Jones	Momotaro Bremen Town Musicians Chicken Little
HISTORY & GEOGRAPHY	Basic Geography and Maps Seven Continents	Native Americans Past and Present	Columbus Pilgrims	George Washington	July 4 Thomas Jefferson	Abraham Lincoln	American Flag White House
MATH Dimensions KA & KB	Chapters 1-2 Begin KA	Chapters 3-4	Chapters 4-5	Chapter 6	Chapters 7-8 Begin KB	Chapters 9-10	Chapters 10-11
SCIENCE	Meteorology: Weather Wilson Bentley	Meteorology: Weather Forecasting Abbe Cleveland	Forces: Pushes and Pulls Collisions Isaac Newton	Forces: Ramps, Magnetic Force Wright Brothers	Plants and Animals: Plant and Animal Needs Jane Goodall	Plants and Animals: Interconnectedness of Plants, Animals, and the Environment George Washington Carver	Plants and Animals: Changing Environment
ART	Color	Color	Line	Line	Sculpture	Bruegel Cassatt	Homer
MUSIC Include 2 songs each month	Instruments	Instruments Introduction to Orchestra	Peer Gynt Elements Tempo	March of Siamese Elements Dynamics	March of the Toys Elements Steady Beat	Carnival of the Animals	Elements High & Low

Grade 1

Year at a Glance

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH
LITERACY Literacy Essentials	Weeks 1-4 Review, List A Begin Primary Phonics	Lists B & C	Lists D & E Begin McCall Harby	Lists F & G	List H Complete Primary Phonics	Lists I & J Begin Uncontrolled Readers	Lists K & L
LITERATURE Include 2-3 poems each month	Frog Prince Hansel and Gretel Thumbelina (& variations)	Cinderella (& variations) Jack and the Beanstalk Pied Piper	Pinocchio	Princess and the Pea Rapunzel Tale of Peter Rabbit	Aesop's Fables Puss-in-Boots Br'er Rabbit	Rumpelstiltskin Sleeping Beauty The Little Hero of Holland	House at Pooh Corner
HISTORY & GEOGRAPHY	Basic Geography and Maps Mesopotamia	Ancient Egypt Judaism	Christianity	Islam	First Americans Maya, Aztec, Inca Modern Mexico	Early Exploration and Settlement	Thirteen Colonies American Revolution
MATH Dimensions 1A & 1B	Chapters 1-3 Begin 1A	Chapters 4-5	Chapters 6-8	Chapters 8-9	Chapters 10-12 Begin 1B	Chapters 13-14	Chapters 15-16
SCIENCE	Astronomy: Solar System	Astronomy: Solar System Galileo	Sound and Light	Sound and Light Communication Using Light and Sound Gordon Gould	Organisms and Their Needs: Structures and Functions	Organisms and Their Needs: Structures and Functions Jacques Cousteau	Organisms and Their Needs: Inheritance of Traits
ART		Art from long ago	Color	Line	Shape	Texture	Portrait
MUSIC Include 2 songs each month	Basic Elements	Basic Notation	Composers Mozart	Orchestra Prokofiev	Opera	Instrumental Music	Ballet

Grade 2

Year at a Glance

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH
LITERACY Literacy Essentials	Weeks 1-2 Review McCall Crabb List 2A Begin Uncontrolled Readers	Lists 2B & 2C	Lists 2D & 2E	Lists 2F & 2G	List 2H	Lists 2I & 2J	Lists 2K & 2L
LITERATURE Include 2-3 poems each month	Charlotte's Web	Magic Paintbrush Fisherman and His Wife Beauty and the Beast	Greek Mythology	Tongue-Cut Sparrow Christmas Carol How the Camel Got His Hump	Peter Pan	Iktomi Stories Tall Tales Talk	Sign of the Beaver
HISTORY & GEOGRAPHY	Basic Geography and Maps Ancient India	Ancient China Modern Japan	Ancient Greece	Ancient Greece	Constitution War of 1812	Geography of the Americas Westward Expansion	Civil War
MATH Dimensions 2A & 2B	Chapters 1-2 Begin 2A	Chapters 3-4	Chapters 5-6	Chapter 7	Chapter 8 Begin 2B	Chapters 9-10	Chapters 11-12
SCIENCE	Geology: Earth Features	Geology: Earth Formation Marie Tharp	Matter: Classifying Matter	Matter: Combining Matter Dmitri Mendeleev	Electricity	Magnetism Magnetism and Electricity	Habitats and Plant Review Jean-Henri Fabre John James Audubon
ART	Lines	Architecture	Architecture	Sculpture	Landscapes	Landscapes	Abstract Art
MUSIC Include 2 songs each month	Basic Notation	Basic Elements	String Instruments Carnival of the Animals	Vivaldi	Percussion Instruments Toccata for Percussion	Keyboard Instruments Sonata K. 331	Beethoven Spring Song

Grade 3

Year at a Glance

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH
LITERACY Literacy Essentials	Weeks 1-2 Review Lists for Weeks 1-4	Lists for weeks 5-8	List for weeks 9-12	Lists for weeks 13-16	Lists for weeks 17-20	List for weeks 21-24	List for weeks 25-28
LITERATURE Include 2-3 poems each month	Arabian Nights Black Beauty	Black Beauty Greek and Roman Mythology	Norse Mythology The Princess and the Goblin	The Princess and the Goblin	The Hunting of the Great Bear Farmer Boy	Farmer Boy	Gone is Gone The People Could Fly
GRAMMAR Well-Ordered Language 1A & 1B	Parts of Speech Kinds of Sentences	Principal Elements Adverbs	Adjectives Direct Objects	Subject Pronouns Interrogative Sentences	Object Pronouns Pronoun Review	Prepositional Phrases-Adverbial Introductory Prepositional Phrases	Compound Subjects Compound Verbs
COMPOSITION Structure and Style for Students 1A	Notemaking and Outlining Writing from Notes	Writing from Notes	Retelling Narrative Stories	Summarizing a Reference	Summarizing a Reference	Writing from Pictures	Writing from Pictures Summarizing Multiple References
HISTORY & GEOGRAPHY	Rivers of the World Ancient Rome	Ancient Rome	Ancient Rome	Vikings Canadian Geography	Native Peoples of North America	Exploration	Southern Colonies
MATH Dimensions 3A & 3B	Chapters 1-2 Begin 3A	Chapters 3-5	Chapters 6-7	Chapters 8	Chapters 9-10 Begin 3B	Chapters 11-12	Chapters 13-14
SCIENCE	Meteorology: Weather, Climate, Layers of the Atmosphere Evangelista Torricelli	Meteorology: Water Cycle, Clouds, Wind, Weather-Related Natural Hazards Benjamin Franklin Mary Anderson Joanne Simpson	Forces Elijah McCoy	Forces Classification of Animals	Social Instincts in Animals Ecology John Muir	Life Cycles Traits Gregor Mendel	Fossils
ART	Balance and Symmetry	Ancient Rome	Ancient Rome	Byzantium	American Indian Art	Light	Space
MUSIC Include 2 songs each month	Elements Orchestra Review	Scheherzade Prelude	The planets	Tchaikovsky	Native American Music William Tell	Souza & Copland	Gershwin, Cohan, & Bernstein

Grade 4

Year at a Glance

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH
LITERACY	Intro of Roots 3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week
LITERATURE Include ≈2 poems each month	Wonderful Chuang Brocade Treasure Island	Treasure Island King Arthur	King Arthur Saint George & the Dragon Robin Hood	Robin Hood Fire on the Mountain	Johnny Tremain	Johnny Tremain	Anne of Green Gables
GRAMMAR Well-Ordered Language 2A & 2B	Principal Elements Diagramming Adverbs	Adverbs Adjectives	Predicate Verbs Direct Objects Predicate Nominative	Predicate Adjectives Predicate Review Possessive Nouns	Prepositional Phrases Compound Elements	Subject Pronouns Object Pronouns	Possessive Pronouns Interrogative Pronouns
COMPOSITION Structure and Style 2A	Notemaking and Outlines Writing from Notes	Retelling Narrative Stories	Summarizing a Reference	Writing from Pictures	Writing from Pictures	Summarizing Multiple References	Inventive Writing
HISTORY & GEOGRAPHY	Mountains China Europe in the Middle Ages	Europe in the Middle Ages	Islam Crusades	Early & Medieval African Kingdoms	American Revolution	Making a Constitutional Government	Washington Adams Jefferson
MATH Dimensions 4A & 4B	Chapters 1-5 Begin 4A	Chapters 5-7	Chapters 7-8	Chapters 9	Chapters 10 Begin 4B	Chapters 11-12	Chapters 13-14
SCIENCE	Geology: Fossils, Weathering & Erosion, Rock Cycle	Geology: Plate Tectonics, Natural Hazards, Geographic Maps James Hutton	Natural Resources	Energy	Electricity & Magnetism Thomas Edison Lewis Latimer Michael Faraday	Waves Alexander Graham Bell	Structures and Functions in Organisms
ART	Ancient China	Medieval Europe	Islamic Art and Architecture	Africa	Late 18th-century United States	Late 18th-century United States	Monticello
MUSIC	Orchestra Review 2 songs	Keyboard instruments 2 songs	Music of the Middle Ages 2 songs	Music of the Middle Ages 1 song	Vocal Ranges Elements	Elements Notation	W. A. Mozart Haydn 2 Songs

Grade 5

Year at a Glance

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH
LITERACY	Root words review 3 roots & 10 spelling/ vocab words per week	3 roots & 10 spelling/ vocab words per week	3 roots & 10 spelling/ vocab words per week	3 roots & 10 spelling/ vocab words per week	3 roots & 10 spelling/ vocab words per week	3 roots & 10 spelling/ vocab words per week	3 roots & 10 spelling/ vocab words per week
LITERATURE Include ~3 poems each month	Secret Garden	Secret Garden Tales from Shakespeare	Wind in the Willows	Wind in the Willows The Samurai's Daughter	Adventures of Tom Sawyer	Adventures of Tom Sawyer Frederick Douglass	Frederick Douglass
GRAMMAR Well-Ordered Language 3A & 3B	Four Kinds of Sentences Adverbs & Adjectives	Predicate Verbs, Nominatives & Adjectives Personal Pronouns	Sensory Linking Verbs Prepositional Phrases	Indirect Objects	Interrogative Pronouns Relative Clauses	Adverbial Elements Adverbial Clauses	Reflexive Pronouns Participles
COMPOSITION Structure and Style for Students 2A	Note Making and Outlines Writing from Notes	Retelling Narrative Stories	Summarizing a Reference	Writing from Pictures	Writing from Pictures	Summarizing Multiple References	Inventive Writing
HISTORY & GEOGRAPHY	Lakes Renaissance	Early American Civilizations European Exploration	Reformation England from Henry VIII to William & Mary	Russia Feudal Japan	Antebellum America	Civil War	Civil War
MATH Dimensions 5A & 5B	Chapters 1-4 Begin 5A	Chapters 4-6	Chapters 6-7	Chapter 8	Chapters 9 Begin 5B	Chapters 9-11	Chapters 11-13
SCIENCE	Astronomy Edmund Halley	Astronomy Astronaut Biographies	Major Earth systems Conservation of Earth's Spheres	Chemistry: Matter, States of Matter	Chemistry: Conservation of Matter, Properties of Matter, Mixtures, Solutions, Chemical Reactions John Dalton	Ecology Jan van Helmont	Classification of Organisms Carl Linneaus
ART	Renaissance Art	Renaissance Art/ Sculpture	Renaissance Art/ Sculpture	Art of Japan	19th-Century American Art	19th-Century American Art	19th-Century American Art
MUSIC	Orchestra Elements	Renaissance Music	Renaissance: Dona Nobis Pacem	Songs: Sakura and Hava Nagilah Beethoven	Mussorgsky	Music of the Civil War	Spirituals

Grade 6

Year at a Glance

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH
LITERATURE Include ~2 poems each month	Classical Mythology	Children's Homer	Children's Homer Prince and the Pauper	Prince and the Pauper	Scarlet Pimpernel	Scarlet Pimpernel	Count of Monte Cristo
GRAMMAR Well-Ordered Language 4A & 4B	Principal Elements, Adverbs & Adjectives Predicate Verbs, Predicate Nominatives, and Predicate Adjectives	Prepositional Phrases Personal Pronouns	Indirect Objects Interrogative Pronouns and Interrogative Adverbs	Relative Clauses with Relative Pronouns and Relative Adverbs Appositives	Reflexive Pronouns & Intensive Pronouns	Adverbial Causes & Phrases Indefinite Pronouns	Participial Phrases Gerund Phrases
COMPOSITION Structure and Style for Students 2B	Notemaking and Outlines Writing from Notes	Retelling Narrative Stories	Summarizing a Reference	Writing from Pictures	Writing from Pictures	Summarizing Multiple References	Inventive Writing
HISTORY & GEOGRAPHY	Deserts Judaism & Christianity	Ancient Greece	Ancient Rome	Ancient Rome Enlightenment	French Revolution	Romanticism Industrialism	Capitalism & Socialism
MATH Dimensions 6A & 6B	Chapters 1-2 Begin 6A	Chapters 2-3	Chapters 4-5	Chapters 6-7	Chapter 8 Begin 6B	Chapters 11-12	Chapters 12-13
SCIENCE	Plate Tectonics Alfred Wegener	Energy Marie Curie	Heat & Heat Transfer	Energy Transfer Lewis Latimer James P. Joule	Astronomy Isaac Newton	Human Body: Circulatory & Lymphatic Systems	Immune System & Diseases Alexander Fleming
ART	Classical	Gothic	Renaissance	Baroque	Rococo	Neoclassical	Romantic
MUSIC	Orchestra Elements	Elements	Baroque Vivaldi	Handel & Bach	Classical: Haydn & Mozart	Classical: Rossini Beethoven	Early Romantic: Schubert Beethoven
LATIN Wheelock's	Introduction Chapter 1	Chapter 1	Chapter 2	Chapter 3	Chapter 4	Chapter 5	Chapter 6

Grade 7

Year at a Glance

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH
LITERATURE Include ≈2 poems each month	Fahrenheit 451	Fahrenheit 451 Cyrano de Bergerac	Cyrano de Bergerac Christmas Carol	Christmas Carol	Call of the Wild	Call of the Wild	Romeo & Juliet
GRAMMAR Get Smart	Principal Elements of the Sentence Lessons 1-4	Pronouns Adjectives Lessons 5-8	Adverbs Prepositional Phrases Transitive Verbs Lessons 9-12	Coordinating Conjunctions Lessons 13-17	Indirect Objects Intransitive Verbs Passive Verbs Lessons 18-21	Linking Verbs Noun Jobs Clauses Lessons 22-26	Clauses Lessons 27-30
COMPOSITION Structure and Style for Students 3B	Notemaking and Outlines Writing from Notes	Retelling Narrative Stories	Summarizing a Reference	Writing from Pictures	Writing from Pictures	Summarizing Multiple References	Inventive Writing
HISTORY & GEOGRAPHY	Exploration and Colonization	American Revolution	U.S. Constitution	U.S. Constitution	Early Republic	Antebellum Era	Abraham Lincoln
MATH Dimensions 7A & 7B	Chapters 1-2 Begin 7A	Chapters 3-4	Chapters 5-6	Chapters 7-8	Chapters 9-10 Begin 7B	Chapters 11-12	Chapters 13-14
SCIENCE	Review Scientific Method Atomic Structure Niels Bohr Dmitri Mendeleev	Atomic Structure Antoine Lavoisier	Chemical Bonds and Reactions Lise Meitner	Chemical Bonds and Reactions	Chemistry of Food and Respiration	Chemistry of Food and Respiration Dorothy Hodgkin	Cell Division and Genetics
ART	Impressionism	Impressionism	Post-Impressionism	Post-Impressionism	Art Nouveau	Expressionism & Abstraction	Expressionism & Abstraction
MUSIC	Elements: Orchestra	Elements: Orchestra	Beethoven Pagagini Chopin	Romantic: Schuman Brahms & Liszt	Romantic: Berlioz Vergj	Romantic: Wagner	Nationalism: Grieg & Tchaikovsky Dvorak
LATIN Wheelock's	Review	Chapter 9	Chapter 10	Chapter 11	Chapter 12	Chapter 13	Chapter 14

Grade 8

Year at a Glance

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH
LITERATURE	To Kill a Mockingbird	To Kill a Mockingbird	Lord of the Flies	Lord of the Flies	Robinson Crusoe	Robinson Crusoe	Short Stories Much Ado About Nothing
GRAMMAR Stay Smart	Review: Parts of Speech Phrases	Review: Clauses Verbals	Diagramming Sentences 1-27	Diagramming Sentences 28-55	Diagramming Sentences 56-83	Diagramming Sentences 84-111	Diagramming Sentences 112-139
COMPOSITION Structure and Style for Students 1C	Notemaking and Outlines Writing from Notes	Retelling Narrative Stories	Summarizing a Reference	Writing from Pictures	Writing from Pictures	Summarizing Multiple References	Inventive Writing
HISTORY & GEOGRAPHY	The Gilded Age Progressivism Toward the Great War	World War I The Roaring Twenties	The Great Depression Rise of Totalitarianism World War II	World War II	The Start of the Cold War	Cultural changes and Activism The 1960s	The 1960s The 1970s
MATH Weeks & Adkins	Chapters 1-2	Chapters 3-4	Chapters 5-6	Chapter 7	Chapter 8	Chapter 9-10	Chapters 11-12
SCIENCE	Review scientific method and metric system Motion	Forces	Density and Buoyancy	Work, Energy, Power Albert Einstein	Work, Energy, Power Sound	Sound Electromagnetic Radiation and Light	Light Charles Steinmetz
ART	Painting since WWII	Painting since WWII	Photography	Photography	20th Century Sculpture	20th Century Sculpture	Architecture since the Industrial Revolution
MUSIC	Music Theory Review: Rhythm & Melody Orchestra	Nationalism: Sibelius & Bartok	Nationalism: Rodrigo & Ravel	Nationalism: Vaughn Williams Copland	Moderns: Debussy & Stravinsky	Musical Theater: Gilbert & Sullivan Vaudeville Revue	Musical Theater: Gershwin, Berlin, Cohan
LATIN Wheelock's	Review Chapter 18	Chapters 19-20	Chapter 21	Chapter 22	Chapter 23	Chapter 24	Chapter 25

North Idaho Classical Academy
ATTN: Marvin Lasnick
5635 Sunset Rd
Fruitland, ID 83619

9/13/2023

Re: Letter of Intent Regarding North Idaho Classical Academy and Hillsdale

Dear Mr. Lasnick,

This Letter of Intent (the “Letter”) summarizes the principal terms and conditions that shall govern the relationship between Hillsdale College and its K-12 Education Office (collectively, “Hillsdale”) and the board of North Idaho Classical Academy (“Institution”), in connection with Hillsdale’s evaluation of Institution’s schools for a potential affiliation between the two parties (the “Application Evaluation Process”). Both Institution and Hillsdale are referenced herein individually, as a “party” and collectively, as the “parties.”

In consideration of Institution having applied to commence a relationship with Hillsdale and Hillsdale’s review of those applications (the “Applications”) in connection with the Application Evaluation Process, the parties intending to be legally bound agree as follows:

1. Term. The Term of this Letter shall commence on the date of this Letter (the “Effective Date”) and shall continue until the earlier of: (a) fifteen (15) months after the Effective Date, or (b) per the Termination clause contained within this letter. At the end of the fifteen-month period referred to in Section 1(a), Institution may reapply for assistance for any of the schools listed in its Applications that did not achieve “Member School” affiliation with Hillsdale during the Term of this Letter.

2. Requirements of Institution.

a. *Phase I Gateways* – By the end of the first six (6) months after the Effective Date or fifteen (15) months before the anticipated commencement of the Institution’s schools’ first academic year, whichever comes sooner, and as a condition of receiving Hillsdale’s ongoing support as outlined in Section 3, Institution, including those involved in its founding and creation of the schools (the “Group”), shall complete all of the Phase I tasks in Exhibit A to this Letter (which is attached hereto and incorporated herein) for each school referenced in the Applications.¹

b. *Phase II Gateways* – By no later than the end of the first twelve (12) months after the Effective Date or twelve (12) months before the anticipated commencement of the Institution’s schools’ first academic year (unless otherwise specified in the “Date of Completion” column of Exhibit A to this Letter), whichever comes sooner, and as a condition of receiving Hillsdale’s consideration for acceptance as Hillsdale College Member Schools, Institution and Group shall

¹ For clarity, each of the schools referenced in the Applications must meet each deadline with respect to its own campus.

complete all the Phase II tasks in Exhibit A to this Letter for each school referenced in the Applications.

c. *Phase III Gateways* – By no later than six (6) months before the anticipated commencement of the Institution’s schools’ first academic year (unless otherwise specified in the “Date of Completion” column of Exhibit A to this Letter), and as a condition of receiving Hillsdale’s consideration for acceptances as Hillsdale College Member Schools, Institution and Group shall complete all the Phase III tasks in Exhibit A to this Letter for each school referenced in the Applications.

d. *Cooperation with Hillsdale* – In connection with the Application Evaluation Process and during the Term of this Letter, Institution shall make the appropriate persons available, upon request by Hillsdale, to address any questions, participate in any interviews, and to meet during any Hillsdale site visits to Institution’s sites for the schools, as may be reasonably requested by Hillsdale representatives. Institution acknowledges and agrees that all information and statements provided to Hillsdale in accordance with this Letter shall be current, complete, and accurate and that Institution will promptly inform Hillsdale of any material changes to any information provided or statements as part of the Application Evaluation Process. Significant material changes, which include but are not limited to a majority turnover of board membership or changes to the opening plans with regard to overall school size or grade offerings, will require formal notice to and consideration by Hillsdale.

e. *Diligence Concerning Authorizer Requests* – During the Term of this Letter, Institution shall act diligently to ensure timely responses to questions and requests for information from the applicable state authorizer for the schools to ensure the schools open under the time frames contemplated in this Letter.

f. *Education Service Provider.* – If Institution engages an Education Service Provider (defined below) to provide services for Institution, then as a condition of engaging such Education Service Provider, Institution acknowledges and agrees that it must require the Education Service Provider to enter into a separate license agreement with Hillsdale governing the use of Hillsdale’s intellectual property, including the Licensed Training Materials. For purposes of this Section, “Education Service Provider” means any charter management organization or other education service provider that renders services to a Licensee school, including, without limitation, marketing, human resource, school management, and other related services.

3. Hillsdale’s Support Services. During the Term of this Letter, Hillsdale shall provide Institution with the following assistance services as it relates to the schools (collectively, the “Services”):

a. *Limited Access to Licensed Training Materials* – Hillsdale shall provide Institution with a limited License, as set forth in Section 5 of this Letter, for temporary access to certain materials and curricula for classical charter school education grades K-12, including, without limitation, a scope and sequence guide, exemplar materials, a program guide for each grade of K-12 and associated bill of materials, and other materials which Hillsdale, at its sole discretion, may provide (collectively, the “Licensed Training Materials”) for use at the schools. The Licensed

Training Materials do not include access to or copies of any auxiliary materials or resources and other copyrighted material or trade secrets that might be referenced in or that may accompany either the program guide or bill of materials otherwise reserved for fully licensed users under the terms and conditions of a separate Member School Agreement.²

b. *Information and Guidance Concerning Certain School Documents* – Hillsdale shall provide Institution with assistance, including information and guidance, concerning the creation of Institution’s bylaws and the bylaws of the schools’ boards, completing and filing IRS Form 1023 to obtain 501(c)(3) status for the schools, and in connection with Institution’s application to the applicable state authorizers for the schools.

c. *Vetting Head of School Candidates* – Hillsdale shall assist Institution as part of the hiring process for the Heads of School. This includes Hillsdale conducting separate interviews with candidates being considered for hire by Institution and schools and providing the governing board (if different from Institution) with a recommendation regarding the hire of the position. Institution’s decisions on Heads of School have a direct impact on Hillsdale’s future relationship and affiliation with Institution and the schools.

d. INSTITUTION ACKNOWLEDGES AND AGREES THAT THE LICENSED TRAINING MATERIALS AND SERVICES PROVIDED HEREUNDER ARE PROVIDED “AS IS”, WITH NO REPRESENTATION OR WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT OF INTELLECTUAL PROPERTY RIGHTS OR ANY IMPLIED WARRANTY ARISING FROM STATUTE, COURSE OF DEALING, COURSE OF PERFORMANCE, OR USAGE OF TRADE. HILLSDALE HAS NO DUTY TO INDEMNIFY INSTITUTION AND/OR SCHOOLS HEREUNDER.

4. Publicity. For the duration of this Agreement, Institution may represent to third parties, in connection with the completion of the Institution’s charter for the schools and in communications with the applicable state authorizers, that Institution has executed a Letter of Intent with Hillsdale College’s K-12 Education Office regarding the relevant Hillsdale College Candidate Member Schools. Institution can also indicate that it is receiving startup guidance from Hillsdale College and plans to use Hillsdale College K-12 curriculum. Institution shall not have any other right to use the names or logos of Hillsdale College. Upon expiration or termination of this Letter, Institution’s rights under this Section 4 shall also immediately terminate and Institution shall not use Hillsdale College’s name in any manner, except as may be mutually agreed upon by the parties in writing.

5. Limited Access to Licensed Training Materials; Ownership. Subject to the terms and conditions of this Letter, Hillsdale hereby grants to Institution for limited use at the schools contemplated herein, a non-exclusive, nontransferable, revocable license and right to use, access, and reproduce the Licensed Training Materials on the approved mediums for strictly educational

² Institution accepts and acknowledges that Hillsdale may require that the relevant Member School Agreements be entered into by the charter holders of each school – e.g., the board governing the school – rather than Institution itself.

and non-commercial purposes and strictly within the Institution contemplated by this Letter for the purposes of its completion of the Application Evaluation Process. The Licensed Training Materials and all related content created, purchased or otherwise belonging to or provided by Hillsdale are the sole and exclusive property of Hillsdale, and are protected by this Letter, as well as various state, federal and foreign intellectual property rights, including copyright laws and international copyright treaties and trademark laws. Institution may not download, transmit, copy, store, publish or distribute the Licensed Training Materials in any form or by any means, to any other entity, organization or school. By agreeing to the terms and conditions of this Letter, Institution shall not become the owner of the Licensed Training Materials but is entitled to use the Licensed Training Materials for educational and non-commercial means as specifically permitted according to the terms of this Letter. Institution may not alter or attempt to alter or modify any part of the Licensed Training Materials or the information contained therein. Institution agrees that it may not remove any Hillsdale credit or attribution, including attribution to any Hillsdale or other authors. Institution may not provide supplemental materials to the Licensed Training Materials without language making clear that such material is not part of the original Licensed Training Materials supplied by Hillsdale. Institution also agrees to furnish Hillsdale College with any derivative works created with reference to the Licensed Training Materials, including, but not limited to, applications to state authorizers, grant applications, and alignments between curriculum and state standards.

6. Confidentiality.

a. *Licensed Training Materials* – Institution acknowledges that the Licensed Training Materials and their contents are confidential and proprietary to Hillsdale, that the information contained therein is of significant value, and that its unlawful copying and/or disclosure to others may cause irreparable harm to Hillsdale. Hillsdale designates and protects its Licensed Training Materials, curricula and other trade secrets as confidential and proprietary. Institution shall not disseminate these confidential and proprietary materials to any individual or entity without the express written permission of Hillsdale. Hillsdale has and will continue to take appropriate measures and actions to prevent these confidential and proprietary materials from becoming available to persons other than those approved by Hillsdale to have access to such materials. Except as specifically provided herein, Institution hereby agrees and covenants that, during and after the Term, Institution will maintain confidentiality of such materials and will not, directly or indirectly, in one or a series of transactions, disclose to any individual, sole proprietorship, partnership, corporation, limited liability company, unincorporated society, trust or other entity (each a “Person”) outside of Institution organization for the schools, or use or otherwise exploit the Licensed Training Materials for Institution’s own benefit or for the benefit of any Person other than members of Institution’s organization for the schools.

b. *Letter and Other Hillsdale Confidential Information* – During the Term of this Letter, Institution acknowledges that Hillsdale may disclose or otherwise provide Institution with access to confidential information, including, (i) the terms and conditions of this Letter, any exhibits or attachments thereto, (ii) any document Hillsdale marks as “Confidential” at the time of disclosure whether orally or in writing, and (iii) any other nonpublic, sensitive information that Hillsdale discloses to Institution (each and collectively, “Confidential Information”). Confidential Information shall not include information that (i) is in Institution’s possession at the time of

disclosure, (ii) is independently developed by Institution without use of or reference to Confidential Information, (iii) becomes known publicly, before or after disclosure, other than as a result of an act, omission or breach by Institution, or (iv) is approved in writing by Hillsdale for Institution to disclose. Institution may disclose the terms and conditions of this Letter to its state authorizer without being in violation of this confidentiality provision. In each case in which Institution argues that one of the foregoing exceptions to Confidential Information applies, Institution shall have the burden of proof to establish such exception. For the duration of this Letter, Institution shall not disclose any Confidential Information to any board member, Group member, employee, agent, or representative of Institution or the schools unless such person has a need to know such information in connection with a party's obligation under this Letter and it advises the party that such information is confidential, and Institution shall not disclose any Confidential Information to any other party without Hillsdale's prior written consent. Institution shall protect Confidential Information using the same degree of care it uses to protect its own information of a confidential nature, but no less than a reasonable amount of care. Institution shall immediately notify Hillsdale in the event of any misuse or misappropriation of Confidential Information. Institution may disclose Confidential Information as required by law, provided however, to the extent not prohibited by applicable law, it shall provide Hillsdale with prompt notice of the legal demand for disclosure and cooperate with Hillsdale in any effort by Hillsdale to obtain a protective order or to contest such disclosure, at Hillsdale's expense. At the conclusion of this Letter, Institution shall return or destroy, at Hillsdale's option, all Confidential Information and the Licensed Training Materials, and provide certification of the same.

7. Termination. Hillsdale reserves the right to terminate the terms of this Letter and access to the Licensed Training Materials for any reason (including for failure to meet the Phase I, II, or III deadlines) immediately upon written notice to Institution. It is further understood and agreed that upon termination, Institution shall immediately cease any and all use of the Licensed Training Materials and any and all related content created or provided by Hillsdale. Institution agrees that upon termination or the receipt of any notice of impending termination that neither Institution nor its employees or representatives shall make or publish any statement having the effect of diminishing, damaging, or otherwise defaming the goodwill, value, or reputation of Hillsdale College.

8. Governing Law. This Letter shall be governed by and construed in accordance with the laws of the State of Michigan, without giving effect to any choice or conflict of law rule.

9. Miscellaneous. This Letter may be executed in counterparts, each of which shall be deemed to be an original, but all of which shall constitute one agreement. The headings of the various sections of the Letter have been inserted for reference only and shall not be deemed to be part of this Letter. Each party hereto acknowledges that it is a separate entity and that nothing contained in this Letter shall be deemed to create a joint venture, partnership or any other relationship or require any party to enter into a subsequent transaction.

10. Assignment and Severability. The parties may not assign or transfer their obligations under this Letter. If any provision of this Letter is found to be unenforceable, the remainder shall be enforced as fully as possible and the unenforceable provision shall be modified

to the limited extent required to permit its enforcement in a manner most closely approximating the intention of the parties as expressed herein.

IN WITNESS WHEREOF, the parties hereto accept and agree to be legally bound by the terms and conditions set forth above and have caused their respective duly authorized representatives to execute this Letter as of the Effective Date.

HILLSDALE COLLEGE

By:  _____

Print Name: Richard P. Pewé Jr.

Title: VP/CAO

INSTITUTION

By:  _____

Print Name: Marvin Lasnick

Title: Board Chair

Exhibit A Timeline for Phases and Gateways

The Phase I tasks listed below include some tasks which Institution is expected to have already completed prior to the Effective Date. To the extent this is not the case; an Institution is expected to work more efficiently and diligently during Phase I to catch-up with other schools under consideration by Hillsdale for acceptance into the membership program.

Phase	Task	Date of Completion
Phase I	Establish and hold regular Group meetings during each month of this Agreement to address matters related to the school, including the creation of temporary committees and the assignment of responsibilities	
Phase I	Complete a draft of the bylaws for the school, which shall reflect consideration of the Hillsdale model	
Phase I	Complete and file IRS Form 1023 to establish federal nonprofit status as a 501(c)(3)	
Phase I	As part of its charter application, prepare an education plan, which shall include: <ul style="list-style-type: none"> • a research base for curriculum and performance of similar schools, • a basic explanation of curriculum and instruction, • elementary and middle school schedules, • high school course plan and graduation requirements, • measurable goals and testing, • support for special student populations, and • any necessary curricular alignment documents 	
Phase I	Prepare the job description for the Head of School	
Phase I	Establish an executive-search process for Head of School, which shall include Hillsdale in the review process of candidates	
Phase I	Identify, vet, compare, and engage any management or service providers who will be named in the charter application	
Phase I	Submit fully-completed authorizer application to Hillsdale at least 30 days before due date to authorizer or, if the application has been submitted before the Effective Date, within 30 days of the Effective Date.	
Phase I	Write and approve a transition plan from now through opening, including identifying any new board members	
Phase I	Determine and approve school opening size and a growth plan for school	
Phase I	Identify at least one viable school site in the school's geographic area for each school, including expected development costs, timeline, and contractors (facility costs should not exceed 18% of anticipated revenue)	
Phase I	Develop a basic finance plan to cover year-zero, startup, and building/remodeling costs for the school	
Phase I	Identify, vet, compare, and engage charter school legal counsel	
Phase I	Develop a budget, which at a minimum should include year-zero through operational year three finances and should	

	include two enrollment scenarios (e.g. 90% and 75% of full-enrollment)	
Phase I	Develop a fundraising plan based on the finance plan and budget	
Phase I	Create the school name, mission statement, and school virtues	
Phase I	Submit fully-completed authorizer application to authorizer	
Phase I	As possible, meet with authorizer representatives, relevant political officials, and/or members of the local school board to build support for the school's application	
Phase I	Start to build a network of support and interest through community events and social networks	
Phase I	Create a school logo and a basic brochure for the school	
Phase I	Establish a system for building an interest list, including emails	
Phase I	Adapt public relations roadmap into a specific plan for school	
Phase I	Assign public relations and marketing responsibilities	
Phase I	Create and manage a social media page (which can be private at this juncture)	
Phase I	Create a newsletter template	
Phase I	Purchase an online domain name for the school and start working on a brochure website	
Phase I	Determine lottery and enrollment process specifics, including any enrollment preferences, which should include, where possible, a preference for transfers from other Hillsdale-selected schools	
Phase I	Begin work on board policies, including a conflict of interest policy	
Phase I/II as necessary for charter application	Prepare a first draft of the Student/Family Handbook	
Phase I/II as necessary for charter application	Prepare a first draft of the Staff/Faculty Handbook	
Phase II	Respond to any questions or feedback from authorizer	
Phase II	Prepare for the capacity interview with the school's authorizer, which shall include expecting questions about all of the following: <ul style="list-style-type: none"> • management and/or school leadership, • performance of similar schools and research base for school's academic program, • support for student sub-populations, • support for students with special needs, disabilities, and language barriers, • business plan and budget, and • facilities and financing 	
Phase II	Continue to build the school's network of support and interest through social media networks, community events, and begin to develop a potential enrollment list	

Phase II	Develop additional informational brochures and related materials about the school	
Phase II	Begin executive search process for the Head of School	
Phase II	Submit Head of School Candidate(s) to Hillsdale for review	By August 1 year zero ³
Phase II	Identify other viable school sites, compare these sites to the original site as it relates to size, cost, growth, amenities, and financing options	
Phase II	Identify, vet and compare available financing options (as necessary)	
Phase II	Prepare grant applications (as appropriate)	
Phase II	Meet necessary fundraising goals to begin funding year-zero (the first year immediately prior to the First Year of Operations)	
Phase II	Demonstrate substantial progress and due diligence towards a facility solution that will appropriately serve the needs of the School upon its opening	
Phase II	Hire Head of School	By September 1 year zero
Phase III	Send Head of School to attend Hillsdale New School Leader Bootcamp Conference	By October year zero
Phase III	Require Head of School participation in Hillsdale’s School Leader Support Program, including: <ul style="list-style-type: none"> • monthly school leader calls beginning autumn of year zero • visits to Hillsdale Member Schools • required reading • attendance at February year zero School Leader Conference and Job Fair and June year zero K-12 Summer Conference • deliverables to include a local marketing plan (September year zero), a school enrollment plan (January year zero), and a draft class schedule (January year zero) 	By end of May year zero
Phase III	Announce school location and have executed or satisfied all requisite leases or facility contracts, including for construction or renovation, zoning allowances, and permitting	By February 1 year zero
Phase III	Open student enrollment	By February 1 year zero ⁴

³ “Year zero” means the fiscal year before the fiscal year in which the school will open. For example, if a school intends to open in August 2030, “year zero” is July 1, 2029 – June 30, 2030.

⁴ These deadlines may be shifted if required by state law.



August 7, 2023

Idaho Public Charter School Commission
Chairman Alan Reed
Vice-Chair Sherrilynn Bair
514 W. Jefferson, Suite 303
Boise, ID 83702

Dear Chairman Reed and Members of the Idaho Public Charter School Commission,

I am writing in support of the charter petition for North Idaho Classical Academy (NICA). The Bluum team has worked closely with American Classical Schools of Idaho (ACSI), whose Chief Executive Officer is Steve Lambert. ACSI is currently made up of two schools—Treasure Valley Classical Academy (TVCA) in Fruitland and Idaho Novus Classical Academy (INCA) in Eagle.

TVCA is Idaho's first Hillsdale College Barney Charter School Initiative (BCSI) school. Bluum has partnered with TVCA's board and leadership to raise \$4,135,601 over the last five years: \$1.911 million from the J.A. and Kathryn Albertson Family Foundation (JKAF), \$1.25 million in federal Charter Schools Program (CSP) funding and \$975,000 from other supporters. INCA will be located in the Avimor development and is receiving \$2.57 million from JKAF and \$800,228 in CSP funding. INCA is slated to open in August 2024.

Similarly, Bluum and its partners are committed to supporting NICA. As of the writing of this letter, JKAF has funded a \$135,000 Idaho New School Leader fellowship through Bluum for Dr. Jacob Francom. He is working with the ACSI team to learn the BCSI model, and with Bluum to develop the most effective operational and fiscal approach to launching a successful public charter school and how to implement it most successfully in Boundary County.

Idaho is fortunate to have an outstanding educator like Dr. Francom committed to working for our students. He is supported by veteran charter school leader Stephen Lambert and the ACSI board. Bluum is committed in writing to providing ongoing no-fee technical support for NICA. Please refer to the attached no-fee grant agreement.

Bluum will support the work of NICA and other future ACSI schools. Since 2015, Bluum has helped to allocate \$43,406,227 of JKAF funding, \$20,225,000 of federal CSP funding and \$6,389,223 of other philanthropic support for the growth and expansion of Idaho's public charter schools and other schools of choice (see attachment Bluum Partner Schools & Philanthropic Support).


Since philanthropic support for charter schools is allocated through Bluum, JKAF is no longer providing letters directly to schools regarding commitment of grant funds for charter petition purposes. Our intent is to work with JKAF to allocate startup funding to NICA, up to or in excess of \$1.4 million. However, those discussions cannot continue in earnest until such time that NICA is an authorized charter school in the State of Idaho. Please consider this letter as evidence to substantiate availability of the grant funds

included in NICA's proposed budget but know that funding cannot be guaranteed until after the petitioners achieve the authorization milestone.

I also want you to know that once authorized, NICA will be able to compete for the federal CSP grant, which could result in up to \$2 million in additional funding beyond what will be provided by JKAF. Other funding partners in Idaho are also interested in supporting NICA as needed.

Bluum is proud to support the work of North Idaho Classical Academy. We continue to do all we can to aid their efforts including helping to raise and provide grant support as we have for 30+ public charter schools across the state since 2015. We strongly encourage the Idaho Public Charter School Commission to support this important effort. We have and will continue to do so well into the future.

Sincerely,



Terry Ryan
CEO

Bluum Partner Schools & Philanthropic Support

- First grants issued in 2015, grants through June 2023

- Total# new seats - expected seats at full enrollment

School	JKAFF Grants, Including		Other	Total Grant	Total # New	Per Seat
	Fellowships	CSP Funds	Philanthropy	Support	Seats	Grant Support
Alturas International Academy	\$ 1,233,170	\$ -	\$ -	\$ 1,233,170	538	\$ 2,292
Alturas Preparatory Academy	\$ 1,760,000	\$ 800,000	\$ 151,523	\$ 2,711,523	602	\$ 4,504
Anser Charter School	\$ 1,116,113	\$ 800,000	\$ -	\$ 1,916,113	302	\$ 6,345
Cardinal Academy	\$ 903,000	\$ 376,085	\$ -	\$ 1,279,085	140	\$ 9,136
Compass Public Charter School	\$ 1,912,897	\$ 800,000	\$ -	\$ 2,712,897	702	\$ 3,865
Connor Academy	\$ -	\$ 800,000	\$ -	\$ 800,000	282	\$ 2,837
Doral Academy of Idaho	\$ -	\$ 382,285	\$ -	\$ 382,285	342	\$ 1,118
Elevate Academy, Caldwell	\$ 1,250,000	\$ 1,250,000	\$ -	\$ 2,500,000	487	\$ 5,133
Elevate Academy, Idaho Falls	\$ 2,879,300	\$ 600,720	\$ -	\$ 3,480,020	488	\$ 7,131
Elevate Academy, Nampa	\$ 2,250,000	\$ 800,000	\$ -	\$ 3,050,000	486	\$ 6,276
Elevate Academy, North Idaho	\$ 1,650,000	\$ 800,000	\$ -	\$ 2,450,000	308	\$ 7,955
Fern Waters Charter School	\$ -	\$ 130,814	\$ -	\$ 130,814	57	\$ 2,295
Forge International School	\$ 1,730,734	\$ 1,250,000	\$ -	\$ 2,980,734	653	\$ 4,565
Future Public School	\$ 2,068,868	\$ 1,250,000	\$ 1,745,700	\$ 5,064,568	576	\$ 8,793
GEM Prep: Meridian	\$ 1,673,466	\$ 1,250,000	\$ 585,000	\$ 3,508,466	595	\$ 5,897
GEM Prep: Meridian North	\$ 1,051,051	\$ 800,000	\$ 100,000	\$ 1,951,051	574	\$ 3,399
GEM Prep: Meridian South	\$ 1,400,000	\$ 800,000	\$ 100,000	\$ 2,300,000	574	\$ 4,007
GEM Prep: Nampa	\$ 1,675,549	\$ -	\$ 1,217,000	\$ 2,892,549	596	\$ 4,853
GEM Prep: Pocatello	\$ 1,688,970	\$ -	\$ 725,000	\$ 2,413,970	595	\$ 4,057
GEM Prep: Twin Falls	\$ 2,125,000	\$ 837,500	\$ -	\$ 2,962,500	574	\$ 5,161
Grace Lutheran High School	\$ 250,000	\$ -	\$ -	\$ 250,000	300	\$ 833
Hayden Canyon Charter School	\$ -	\$ 800,000	\$ -	\$ 800,000	434	\$ 1,843
Idaho Arts Charter School	\$ 1,925,750	\$ 800,000	\$ -	\$ 2,725,750	842	\$ 3,237
Treasure Valley Classical Academy	\$ 1,910,601	\$ 1,250,000	\$ 975,000	\$ 4,135,601	702	\$ 5,891
Idaho Novus Classical Academy	\$ 2,568,000	\$ 800,228	\$ 50,000	\$ 3,418,228	702	\$ 4,869
North Idaho Classical Academy	\$ 135,000	\$ -	\$ -	\$ 135,000	360	\$ 375
Island Park Elementary Charter	\$ 245,000	\$ -	\$ -	\$ 245,000	30	\$ 8,167
MOSAICS Public School	\$ 2,017,000	\$ 800,000	\$ -	\$ 2,817,000	540	\$ 5,217
Mountain Community School	\$ 280,000	\$ 222,396	\$ 65,000	\$ 567,396	225	\$ 2,522
North Idaho STEM Charter Academy	\$ 584,857	\$ -	\$ -	\$ 584,857	372	\$ 1,572
Pathways in Education	\$ 775,000	\$ -	\$ -	\$ 775,000	300	\$ 2,583
Pinecrest Academy of Idaho	\$ -	\$ 293,884	\$ -	\$ 293,884	367	\$ 801
Pinecrest Lewiston	\$ -	\$ 282,691	\$ -	\$ 282,691	367	\$ 770
Promise Academy (Idaho Youth Ranch)	\$ -	\$ 229,429	\$ -	\$ 229,429	64	\$ 3,585
RISE Charter School	\$ 369,300	\$ 405,615	\$ -	\$ 774,915	225	\$ 3,444
Sage International School	\$ 1,482,522	\$ -	\$ 675,000	\$ 2,157,522	530	\$ 4,071
St. Ignatius Catholic School	\$ 1,321,900	\$ -	\$ -	\$ 1,321,900	488	\$ 2,709
Treasure Valley Leadership Academy	\$ 1,000,000	\$ -	\$ -	\$ 1,000,000	200	\$ 5,000
Upper Carmen Charter School	\$ 173,179	\$ -	\$ -	\$ 173,179	45	\$ 3,848
White Pine Charter School	\$ -	\$ 613,353	\$ -	\$ 613,353	182	\$ 3,370
	\$ 43,406,227	\$ 20,225,000	\$ 6,389,223	\$ 70,020,450	16,746	\$ 4,181



Bluum In-Kind Support Grant Agreement

Project Title: Bluum In-Kind Support Services

Grantee: ACS-I NORTH - (hereinafter ‘Grantee’)
Address TBD

Contact Person(s): Stephen Lambert

Agreement Period: 7/1/2023- 6/30/2024

Total Award: \$28,320 in-kind services

Specifications of the Grant Award:

1. **Project Description:** To support its partner schools, Bluum is committed to providing high-quality support(s) to select partner schools that elect to take advantage of these Bluum services. The support services Bluum offers include but are not limited to: (1) Back-Office; (2) Special Education; (3) Academic; (4) MAP Assessments; (5) Branding and Communications; (6) C-Level and Governance; and/or (7) Medicaid Billing. Hereinafter ‘Support Services.’
2. **Project Objectives.** Make high quality Support Services available to Bluum partner schools free of charge.
 - Ensure timely and accurate reporting of all financial activity as required by federal and state agencies.
 - Ensure timely and accurate reporting of all financial activity as required by nonprofit grantmaking organizations.
 - Empower school leadership and board members in their financial and operational decision-making.
 - Ensure schools establish, staff, and implement their special education systems in compliance with requirements of state and federal special education laws and policies, including timely and accurate completion of student evaluations and student IEPs.
 - Ensure schools have exceptional, innovative education models and services in place that are structured to meet or exceed any/all academic outcomes in grant objectives, authorizer performance certificates, or other applicable state or federal performance metrics.
 - Ensure schools have highly effective marketing tools and systems in place.

- Empower school leadership and board members in their long-term and short-term facilities planning, financing, and development.
 - Support school leaders and boards with governance-related oversight and decision making.
3. **Support Services Provided and Estimated Value.** Appendix A identifies the category(ies) of Support Services Bluum is providing the Grantee and the estimated value of the in-kind Support Services Bluum will provide under the Agreement.
 4. **Participation Requirements - General.** Bluum will provide oversight and evaluation for this grant. To enable Bluum to provide the Support Services, the Grantee shall: (a) provide information, and/or access to information, to Bluum as requested, including but not limited to as provided in Appendix A; (b) participate in associated Bluum training and research; and (c) provide Bluum access to its records, data , and other information needed by Bluum to perform the Services, as identified in Appendix A. Grantee agrees to share all academic performance data with Bluum, including but not limited to IRI, ISAT, MAP, SAT. Bluum will maintain all Grantee school records, data and information in a confidential manner and will comply with all rules of confidentiality as required by State and Federal law and school policy, including but not limited to FERPA, HIPPA, et al.
 5. **Retention of Key Personnel.** Bluum recognizes that the participation of **Stephen Lambert** is critical to the success of the Grantee. If the key personnel noted above ceases to be directly involved in this project, Grantee must immediately notify Bluum CFO Marc Carignan. Upon such notification, Bluum will hold the in-kind grant support, subject to notification of replacement of the personnel. At such time Bluum will make a written determination as to the feasibility of continuing the grant agreement.
 6. **Fiscal Accountability.** This in-kind support has been awarded by Bluum based on the estimated service cost of **\$28,320** listed above, and as detailed in Appendix A. All grant support must be utilized for charitable or educational purposes.

6.1 Expenditure Prohibitions. Grantee shall not use any of the support received from Bluum:

- a. To carry on propaganda, or otherwise to attempt, to influence legislation (within the meaning of Internal Revenue Code (“IRC”) Section 4945(d)(1);
- b. To influence the outcome of any specific public election, or to carry on, directly or indirectly, any voter registration drive (within the meaning of IRC Section 4945(d)(2);
- c. To make any grant to an individual or other organization that does not comply with the requirements of IRC Section 4945(d)(3) or (4); or
- d. To undertake any activity for a non-charitable purpose, as defined in IRC Section 170(c)(2)(B);
- e. To provide material support or resources to any individual or entity that Grantee knows, or has reason to know, is an individual or entity that advocates, plans, sponsors, engages in, or has engaged in terrorist activity; or
- f. To pay administrative indirect costs that are not directly related to the Fellowship as defined in this Agreement.

- 7. Further Assurances.** Grantee shall take all such actions reasonably requested by Bluum, and shall comply with the provisions of any future regulations promulgated under IRC Sections 4942 to 4945 that are applicable to the grant, to ensure that the grant (a) will constitute a “qualifying distribution” by Bluum within the meaning of IRC Section 4942(g), (b) will not constitute a “taxable expenditure” by the Foundation within the meaning of IRC Section 4945, and (c) will not violate the USA PATRIOT Act, Executive Order 13224, or any other applicable law, regulation, or order.
- 8. Indemnification.** Grantee acknowledges that Bluum is providing the Support Services for no compensation for the sole benefit of Grantee, and that Bluum has no control over the operations, acts or omissions of Grantee. As such, Grantee shall indemnify, defend and hold Bluum, its directors, affiliates, subsidiaries, employees and representatives harmless from and against any claims, liabilities, losses, damages, fines, penalties, and expenses (including but not limited to reasonable legal fees and costs) (collectively, “Losses”) incurred by Bluum arising out of this grant, the Support Services, Grantee’s operations, or any violation by Grantee of the grant requirements outlined herein, except to the extent such Losses are caused solely by the willful misconduct of Bluum. Bluum agrees to indemnify, defend and hold the grantee school, its affiliates, subsidiaries, assignees, and licensees harmless from and against any Losses resulting from any injury to person or property caused by willful misconduct on the part of Bluum at the Grantee’s school premises. Except for the foregoing indemnification obligation, Grantee hereby releases Bluum from any and all claims and Losses arising out of this grant and the Support Services.
- 9. Insurance.** Bluum and Grantee shall each procure and maintain appropriate industry-standard insurance, including insurance to cover the indemnification obligations set forth herein, including at a minimum the insurance set forth below. Bluum and Grantee shall cause the other to be listed as an additional insured on any applicable liability insurance policy. All such policies of insurance shall include coverage for contractual liability and a standard waiver of subrogation provision.

Workers Compensation	Statutory
Employer’s Liability	
• Each Accident	\$100,000
• Disease, policy limit	\$500,000
• Disease, each employee	\$100,000
General Liability	
• Each occurrence (Bodily injury & property damage	\$1,000,000
• General Aggregate	\$2,000,000
Automobile Liability (Combined single limit – Bodily injury & property damage)	
• Each Accident	\$1,000,000
Professional Liability Insurance	\$1,000,000
• Each claim made	\$1,000,000
• Annual aggregate	\$1,000,000
Errors & Omissions	\$1,000,000




10. Reporting Requirements. Grantee shall submit the following reports to Bluum:

- **OPINE (CPA Audit) Report** due within 30 days of receipt/issuance. Grantee shall submit a copy of the opine on its financial operations from their annual fiscal audit to Bluum. This should be sent to Bluum following the Grantee's annual financial audit. The report should be attested by the responsible financial officer or a Certified Public Accountant.

11. Termination of In-Kind Support Services Grant. Bluum reserves the right to rescind any granted Support Services at any time. Except in the circumstance where Bluum loses its funding for the Services, Bluum will endeavor to provide Grantee with sixty (60) days notice prior to termination.

12. Definitions. All references to “IRC” are to the Internal Revenue Code of 1986, as amended, and shall be deemed to include the corresponding provisions of any future federal tax laws and regulations that are applicable to the grant. References to the USA PATRIOT Act are to Public Law No. 107-56.

The signature of **Stephen Lambert** indicates acceptance by Grantee of the terms and conditions of this grant and confirm Grantee’s commitment to the project objectives and expected results outlined above. The signature of **Stephen Lambert** also confirms that Grantee is (a) a tax-exempt organization under IRC Section 501(c)(3) that is not a private foundation by virtue of being described in IRC Section 509(a)(1) or (2) or (b) a governmental unit described in IRC Section 170(c)(1).

Name	Signature	Date
Terry Ryan, CEO Bluum	 <small>Terry Ryan (Sep 13, 2023 07:32 EDT)</small>	Sep 13, 2023
Marc Carignan, CFO Bluum		Sep 12, 2023
Stephen Lambert, Executive Director, Grantee		7/18/23

Appendix A

Estimated Value of Support

A-1 Back Office Support:	\$17,500
A-2 Special Education Support:	\$3,500
A-3 Academic Support:	\$520
A-4 Map Assessment Support:	\$0
A-5 Branding and Communication Support:	\$0
A-6 C-Level and Governance Support:	\$6,800
A-7 Medicaid Billing Support:	\$0
Total Est. Value:	\$28,320

Appendix A

Appendix A-1 Back Office Support Services

Estimated hours of Bluum Support: 250

Hourly Rate: \$70

Total Estimated Support: \$17,500

Back Office Services

Human resources

Support maintenance of employee files throughout the year, including education credentials, fingerprinting, perform background checks through the SDE, benefits documentation, contracts, demographic data, work assignments, timesheets, tax elections, I-9, direct deposit election, and contract.

Assist with benefit renewals through insurance broker, all data updates, and reconciling benefits invoices are considered part of accounting services fees below.

Payroll

Monthly payroll processing, Including:

Tax payment and quarterly/annual reporting including W-2, W-3, 1099, 1096, Idaho income tax

Quarterly ID unemployment reporting

PERSI reporting and payment

Sick-time tracking

Transparency reports

Revenues, Expenditures, Federal Title I, II, IV, and Federal IDEA Revenue processing tasks consisting of:

Process cash and check transactions, prepare deposits (to be deposited by school staff)

Monthly Financial Statements

Standard 2M Reports ("Budget Report")

Detail report by G/L code

Transparency reports

Financial Audit Support – Prepare all CPA firm-requested items and follow-ups

Monthly bank reconciliations

Assist with annual budget preparation

Compliance Reporting

Assist preparing or prepare all requested financial reports, which typically include:

<i>Item</i>	<i>Due Date</i>	<i>Dept</i>
Record transactions to correct G/L codes		
Report sales tax for taxable sales		

Appendix A

Review and reconcile electronic payments from state department of education
 Prepare all adjusted journal entries when applicable
 Federal programs– recognition of revenue and accompanying receivable when expenditure is recorded
 Federal programs – assist with or complete monthly posting of funds draw-down using Idaho SDE’s CSFGA web site
 Expenditure processing tasks consisting of:
 Electronic storage of all backup to expenditures
 Place orders, issue purchase orders when required
 Process checks semi-monthly
 Track capital expenditures for auditor / SDE
 Loans / Bonds - accurate posting of P&I, monitoring against amortization schedule
 Loans / Bonds - Compute covenant compliance quarterly, include in board reports
 Complete compliance review of each expenditure, feedback for questionable expenditures
 Post expenditures to correct G/L
 Electronically maintain all expenditure backup and approvals
 Support Federal program monitoring - assist with financial sections of checklists, upload all requested financial data.
 Annual ESSER reporting to SDE.

Accounting

2nd Quarter Reporting (Balance Sheet & Budget/Income Statement), Revised Budget if Needed	31-Jan	PCSC
Annual Statement of Financial Condition	28-Oct	SDE
Annual Report to the Secretary of State	Varies	SOS
Application and Budgets for IDEA Part B and Preschool Special Education Funds	17-Oct	SDE
Charter School Budget	15-Jul	SDE
	30-Jul	PCSC
Consolidated Federal and State Grant Application	30-Jun	SDE
Continuous Improvement Plans and Training Reimbursement Request	23-Jun	SDE
Court-Ordered Tuition Equivalency Report	26-Jun	SDE
District and Charter School Salary Schedules	17-Oct	SDE
IFARMS Annual Financial Report	31-Oct	SDE
ISEE Staff Data Reporting Review	17-Oct	SDE
	31-Oct	Lender
	30-Apr	Lender
Quarterly Financial Statements	30-Jul	Lender
School Building Demographics Building Additions, Reconfigurations, Deletions	30-Jul	SDE
School Facility Maintenance Report	19-Dec	SDE
	17-Oct	PCSC
Submit Independent Audit Report	10-Nov	SDE
	10-Nov	Lender

SDE – Idaho State Department of Education

PCSC – Idaho Public Charter School Commission - if school is authorized by the IPCSC

SOS - Idaho Secretary of State

Lender - any lending institution requiring reports

Appendix A

Appendix A-2 Special Education Support Services

Estimated hours of Bluum Support: 50

Hourly Rate: \$70

Total Estimated Support: \$3,500

In consideration of the Special Education Support Services provided by Bluum, Grantee agrees to comply with the following (Check all that apply):

Check All That Apply	School Commitment
	<i>**Items in BOLD may be provided as individual documents from each school or by providing Bluum login access to the Secure Server for Monitoring, Compliance Tracking Tool and SPED Data Application, and State Testing Results Portals</i>
	Provide Bluum with results of yearly GSFR reviews
	Provide Bluum with LEA Determinations and monitoring level
X	Provide Bluum notice of all state complaints filed and resolution of the said complaint
	Provide Bluum access to state testing results portal (ISAT, IRI and IDAA) for students with disabilities
	Provide Bluum with updated sped percentages (December and May)
X	Provide Bluum special education staffing count (paras, sped teachers etc.) yearly
	Yearly systems quality review
X	Join Bluum-Supported Idaho Ed Plan Aggregate Site (when available)

Bluum agrees to provide the following Special Education services to Grantee:

Check All That Apply	Bluum Support Service	Est. Hours
	Special Education Systems Quality Review	
	Compliant Practices (Development and Support)	
	Special Education Program Resources	
X	New School Launch Supports	50
	Customized Professional Development	

To facilitate Bluum’s ability to effectively provide the above support services, Grantee authorizes the State Department of Education to share special education-related compliance, operations, and student data with Bluum. In accordance with Paragraph 4 of this Agreement, Bluum will maintain confidentiality with respect to all such information.

Appendix A

Appendix A

Appendix A-3 Academic Support Services

Estimated hours of Bluum Support: 8

Hourly Rate: \$65

Total Estimated Support: \$520

In consideration of the Academic Support Services provided by Bluum, Grantee agrees to comply with the following:

Check All That Apply	School Commitment
X	Provide at least 24-hour notice when rescheduling a previously scheduled appointment
X	Providing coach / consultant with regular feedback to ensure their services they provide are high impact

Bluum agrees to provide the following Academic Support Services to Grantee:

Check All That Apply	Bluum Support Service	Est. Hours
X	School or network leader executive coaching (weekly, bi-weekly, monthly, quarterly)	8
	Site visits for instructional action planning	
	Planning and execution of group professional development for school leader (# of participants x hours)	
	Advisory consulting for board functions (goal setting, leader evaluation, succession planning, and leader selection)	
	Analyze / Synthesize School Map data	

Appendix A

Appendix A-4 MAP Testing Support Services

Number of Students: NA

Cost per Student: NA

Total Estimated Support: NA

MAP Testing Support

In consideration of the NWEA MAP Testing support provided by Bluum, Grantee agrees to comply with the following:

Conduct, at a minimum, Spring to Spring NWEA MAP Assessment for each grade level K-8 served by the school.
By August 1 of the Grant Year, Provide Bluum with the number of students in grades K-8 (as applicable) who will complete the MAP Assessment (submit to ACotton@bluum.org)
A school choosing to conduct additional K-8 NWEA MAP testing (ie Fall testing) may submit a written request to Bluum no later than August 1 of the Grant Year asking Bluum to cover the cost of the additional testing (submit to ACotton@bluum.org)
Provide Bluum with access to NWEA MAP results (access to portal)

Bluum agrees to provide the following NWEA MAP Testing support to Grantee:

Fund the cost of the school's Spring NWEA MAP testing
Respond within 15 days to a request to fund additional NWEA MAP testing for K-8 students
Provide the school with an analysis of the school's NWEA MAP results

Appendix A

Appendix A-5 Branding and Communications Support Services

Estimated hours of Bluum Support: NA

Hourly Rate: NA

Total Estimated Support: NA

In consideration of the Communications Support Services provided by Bluum, Grantee agrees to comply with the following:

Check All That Apply	School Commitment
	Include "How did you hear about our school?" field on lottery and enrollment forms
	Provide Bluum access to the responses collected to the above field (April and Sept)
	Provide Bluum access to all available marketing analytics

Bluum agrees to provide the following Communications Support Services to Grantee:

Check All That Apply	Bluum Support Service	Est. Hours
	Brand Development	
	Digital Presence Coaching and Assistance	
	Strategic Communications Planning	
	PR Coaching and Assistance	

Appendix A

Appendix A-6 C-Level and Governance Support Services

Estimated hours of Bluum Support: 80

Hourly Rate: \$85

Total Estimated Support: \$6,800

In consideration of the Operations and Governance Support Services provided by Bluum, Grantee agrees to comply with the following:

Check All That Apply	School Commitment
X	Provide Bluum access to all financial and facilities data and records, as requested
X	Identity a Point of Contact(s) on school team for a facilities project (or POCs)

Bluum agrees to provide the following Operations and Governance Support Services to Grantee:

Check All That Apply	Bluum Support Service	Est. Hours
	Board Training	
	Strategic Planning	40
	Staffing and Hiring (Job Descriptions, Search, Interviewing)	
	Network/Replication School Launch Support	40
	Single Site School Launch Support	
	School Board Policy Support (Review, Interpret, Update)	
	Participate on School Facility Financing or Refinancing Team	

Appendix A

Appendix A-7

Medicaid Billing Support Services

Estimated hours of Bluum Support: NA

Hourly Rate: NA

Total Estimated Support: NA

In consideration of the Medicaid Billing Support Services provided by Bluum, and as the Provider of Record, Grantee agrees to provide information to Bluum that adheres to all rules and regulations that govern the School-based Rehabilitative and Health Related Services Program and agrees to be responsible for and to perform each service marked 'X' in the below list:

Check All That Apply	School Commitment
	<i>**Items in BOLD may be provided as individual documents from each school or by providing Bluum login access to the Secure Server for Monitoring, Compliance Tracking Tool and SPED Data Application, and State Testing Results Portals</i>
	Commitment to maintain the Grantee's Medicaid files in alignment with the Bluum Medicaid Checklist.
	Commitment to participate in Medicaid information and collaboration sessions put on by the SDE and/or Bluum.
	Commitment to training school staff to take over direct Medicaid Billing once schools billing systems are operational and the pre-defined training and support has been completed.
	Ensure that every student for whom Grantee requests Medicaid billing services from Bluum has a Medicaid ID.
	Ensure that: (1) one-time Parental consents are signed, Primary Care physician notifications requirements are met; (2) students qualify for services listed on the IEP; and (3) all services listed on the IEP and Physician referrals are performed and documented by qualified personnel
	Ensure that all services and documentation is in accordance with IDEA, and that the compliant billing documentation is accurate with the documented services listed on the IEP and Physician referrals.
	Ensure that qualified personnel complete and submit timely and accurate information, including but not limited to the IEP cover page and service page, amendments, service delivery logs (records) that meet Medicaid requirements for documenting service delivery and for which Grantee is seeking reimbursement. Grantee will submit such records to Bluum via paper claims or web-based software provided by Bluum, so that Bluum may provide timely and accurate Medicaid claims and reporting.
	Ensure that certifications and licensures of all practitioners are accurate and up-to-date. Ensure that all practitioners submitting claims are not disqualified to do so by the Department of Health & Welfare or the Center for Medicare and Medicaid Services (CMS). Maintain necessary paperwork related to certifications, licensures, etc. of all qualified staff including contracted services for whose services Grantee is seeking reimbursement
	Maintain and update all Medicaid Files relative to Individual Education Program (IEP) changes or updates according to Rehabilitative and Health Related Services program guidelines for all services for which Grantee is seeking Medicaid reimbursement. Provide Bluum with the IEP cover page and service page and amendments.
	Maintain on file and provide Bluum with copies of all recommendations or referrals from a physician or other practitioner of the healing arts for services for which Grantee is seeking reimbursement.

As the consulting and billing agent for Grantee, Bluum is responsible for and agrees to perform each Medicaid Billing service marked 'X' in the list below services to Grantee:

Appendix A

Check All That Apply	Bluum Support Service	Est. Hours
	School-based services Medicaid compliance, administrative, consulting, audit services, based on information documented on the IEP and Physician referral	
	State and federal Medicaid information, liaisons, and updates: Timely and accurate information regarding the rules and regulations associated with the Rehabilitative and Health Related Services Program	
	Assistance with research and eventual identification of Grantee Medicaid eligible population	
	Reasonable efforts in securing physician's referrals (See OPT IN provision below)	
	Upon request, on-site and web training and instruction for Administrators, health related professionals, paraprofessionals, and aides.	
	Accurate, dependable, and confidential Billing Process. Tracking and Reconciliation of all submitted claims	
	Reports showing the status of all Medicaid transactions and reimbursements	
	Assistance in Audit Readiness preparation and facilitation to ensure proper procedure and compliance; Interface with the Department of Health and Welfare as appropriate for audit findings	

PHYSICIAN REFERRAL OPT IN. In the event Grantee does "OPT IN" to have Bluum provide assistance obtaining physician referrals as part of this Agreement the following applies:

Bluum will monitor physician referrals for all students for which Grantee submits Medicaid claims. No claims will be submitted without ensuring that a timely referral has been obtained by Grantee for the services identified in the student's IEP. Bluum will coordinate the referral process with Grantee and make reasonable efforts to obtain a referral on behalf of Grantee. When Bluum has exhausted reasonable means, Bluum will notify Grantee of the names of the students for whom a referral was not obtained along with the reason why. Bluum will maintain and archive referrals from physicians or other practitioners of the healing arts for services for which Grantee seeks reimbursement.

HANDBOOK REVIEW. Both Grantee and Bluum covenant and agree to review the Idaho Medicaid Provider Handbook, Rehabilitative and Health Related Service. Both Parties further agree to abide by the terms contained therein and subsequent orders and or directions as the Idaho Department of Health and Welfare shall provide in reference to the Idaho Medicaid Provider Handbook. Both Parties acknowledge that they have a current copy of the above referenced handbook in their possession.

RECORD KEEPING. Bluum shall maintain complete and accurate records documenting the services provided pursuant to this Agreement and shall submit copies of the records to Grantee within ten (10) working days of the date requested. Additionally, upon reasonable notice Grantee shall have the right to review such records at any time during business hours at Bluum's office.

STUDENT DATA PRIVACY AND SECURITY. The Parties acknowledge their obligation to comply with the Idaho Data Accountability Act.



The Healthy Scholars Project

Greetings,

The Healthy Scholars Project is excited to support **North Idaho Classical Academy (NICA)** on their journey of *forming young hearts and training young minds* within Idaho!

In doing so, we believe that students must be nutritionally sound in order to completely absorb and fully benefit from the rich curriculum **NICA** has to offer.

Since 2019, The Healthy Scholars Project has supported the Treasure Valley by developing and facilitating a unique and nutritious School Lunch Program, unlike any other.

In addition to providing students with a healthy balance of nutritious meals and fan favorites, The Healthy Scholars Project goes above and beyond by supporting compliance requirements including but not limited to the NSLP & Health Department.

The following illustrates a summary of components for which The Healthy Scholars Project is willing to provide assistance and or guidance to NICA:

NSLP Compliance

- Meal Components
- Serving Requirements
- Nutritional Labels
- Commodities
- Vendor Management
- Annual Audits
- Health Inspections
- HACCP plans
- SOPs
- Menu Engineering
- Food Safety
- Warming Process
- Serving Process
- Daily Production Reports
- Lunch Order System
- POS System & Process

Construction Stage

- Commercial Kitchen Design
- Architectural Liaison
- Equipment Identification
- Equipment Testing
- Smallware Procurement
- "Pantry" Procurement
- Kitchen Setup & Organization
- Lunch Platform Setup & Training
- POS System Setup & Training
- Marketing Communication Support

BAU

- Meal Deliveries
 - Deliveries to take place 2-3 times per week to ensure ample food supply is always onsite
- Faculty Training
 - HACCP Plans
 - SOPs
 - Food Safety
 - Warming Processes
 - Serving Processes
 - NSLP

We look forward to supporting the team at NICA in their future endeavor and are available to answer any questions.

V/R,

Tiffany Poso-Muñoz | Co-Founder, The Healthy Scholars Project | 208.616.5764 | Nutrition@TVCAcademy.org

Demographics and Interest Survey

In what industry does your family work?	What is most important to your family in your children's education?	How many children in your household are under 10 y/o?	How many children in your household are between 10 - 14 y/o?	How many children in many household are older than 14 y/o?	Are you satisfied with the education options available to your family?
["other"]	["Character formation","Skills"]	2	3	1	Yes
["other"]	["Humanities (history, culture, language, etc.)","Skills","Science, Te"]	4	0	0	No, I wish there was another education option available to my family.
["Construction","Education"]	["Character formation"]	0	2	1	No, I wish there was another education option available to my family.
["other"]	["Science, Technology, and Math","Skills"]	2	3	1	No, I wish there was another education option available to my family.
["Healthcare"]	["Character formation","Science, Technology, and Math"]	1	0	0	No, I wish there was another education option available to my family.
["Tech","Education","Healthcare"]	["Character formation","Science, Technology, and Math","Humanit"]	1	3	1	No, I wish there was another education option available to my family.
["Healthcare"]	["Character formation","Science, Technology, and Math"]	1	0	0	No, I wish there was another education option available to my family.
["Gov"]	["Character formation","Humanities (history, culture, language, etc"]	1	0	1	No, I wish there was another education option available to my family.
["Forestry","Agriculture"]	["Skills","Athletics","Humanities (history, culture, language, etc.)","Science, Te"]	1	0	0	No, I wish there was another education option available to my family.
["Construction"]	["Character formation"]	3	1	0	No, I wish there was another education option available to my family.
["other"]	["Science, Technology, and Math","Skills"]	2	1	0	No, I wish there was another education option available to my family.
["Construction"]	["Skills","Athletics","Humanities (history, culture, language, etc.)",""]	3	2	0	No, I wish there was another education option available to my family.
["Construction"]	["Character formation"]	3	1	0	No, I wish there was another education option available to my family.
["other"]	["Skills"]	4	3	1	No, I wish there was another education option available to my family.
["other"]	["Science, Technology, and Math"]	2	0	0	No, I wish there was another education option available to my family.
["Construction","other"]	["Skills"]	0	2	0	No, I wish there was another education option available to my family.
["Construction","Healthcare"]	["Skills","Science, Technology, and Math"]	2	0	0	No, I wish there was another education option available to my family.
["Construction"]	["Character formation"]	2	2	0	No, I wish there was another education option available to my family.
["Tech"]	["Science, Technology, and Math","Character formation","Skills"]	2	0	0	No, I wish there was another education option available to my family.
["Education","other"]	["Character formation"]	2	1	0	No, I wish there was another education option available to my family.
["Gov","Education"]	["Character formation","Science, Technology, and Math","Humanit"]	1	1	1	No, I wish there was another education option available to my family.
["other"]	["Character formation","Skills","Humanities (history, culture, langu"]	3	1	0	No, I wish there was another education option available to my family.
["Tech"]	["Character formation","Science, Technology, and Math"]	3	1	0	No, I wish there was another education option available to my family.
["Healthcare","other"]	["Character formation","Skills"]	4	0	0	No, I wish there was another education option available to my family.
["Tech","Construction","Healthcare","Edu"]	["Science, Technology, and Math"]	1	0	1	No, I wish there was another education option available to my family.
["Construction","Healthcare"]	["Character formation"]	3	3	0	No, I wish there was another education option available to my family.
["Healthcare"]	["Character formation"]	1	2	1	No, I wish there was another education option available to my family.
["other"]	["Character formation"]	0	1	1	No, I wish there was another education option available to my family.
["other"]	["Skills","Character formation","Humanities (history, culture, langu"]	2	0	0	No, I wish there was another education option available to my family.
["Gov"]	["Science, Technology, and Math","Skills","Humanities (history, cul"]	3	0	0	No, I wish there was another education option available to my family.
["Healthcare","other","Construction"]	["Character formation","Skills","Science, Technology, and Math"]	0	1	1	Yes
["Tech"]	["Character formation"]	1	1	1	Yes
["Agriculture","Tech","Construction"]	["Humanities (history, culture, language, etc.)"]	2	1	0	No, I wish there was another education option available to my family.
["Forestry","other"]	["Humanities (history, culture, language, etc.)","Science, Technolog"]	1	0	0	No, I wish there was another education option available to my family.
["Construction"]	["Character formation","Science, Technology, and Math","Skills","f"]	2	0	1	No, I wish there was another education option available to my family.
["Forestry","Recreation","Education","othe"]	["Science, Technology, and Math","Humanities (history, culture, language, etc.)"]	0	0	0	
["Aviation"]	["Character formation"]	1	1	0	No, I wish there was another education option available to my family.
["Education","Forestry"]	["Character formation","Humanities (history, culture, language, etc"]	2	1	0	No, I wish there was another education option available to my family.

Intent to Enroll as of November 7, 2023

Submission Time	Parent	How many children are you interested in enrolling?	K	1	2	3	4	5	6	What is your preferred transportation?	City	Postal / Zip code
2023-03-23T18:13:25	Parent	0	0							I will transport my children	Sandpoint	83864
2023-03-20T15:50:19	Parent	3	3			2			1	I will transport my children	Bonnors Ferry	83805
2023-03-16T22:00:43	Parent	3	3	1		1		1		School bus	Priest River	83856
2023-03-04T19:44:09	Parent	1	1				1			I will transport my children	Priest River	83856
2023-03-04T19:22:17	Parent	1	1					1	1	I will transport my children	Sagle	83860
2023-03-04T16:56:57	Parent	2	2					1	1		Naples	83847
2023-03-03T22:36:33	Parent	2	2					1	1	I will transport my children	Sandpoint	83864
2023-03-02T18:51:26	Parent	1	1	1						I will transport my children	Sandpoint	83864
2023-03-02T04:39:13	Parent	2	2	2						I will transport my children	Standpoint	83864
2023-03-02T00:54:32	Parent	1	1		1						Sagle	83860-8168
2023-03-01T21:29:02	Parent	1	1	1						School bus	Bonnors Ferry	83805
2023-03-01T14:28:45	Parent	2	2					1	1	I will transport my children	Bonnors Ferry	83805
2023-03-01T04:24:47	Parent	3	3		1		1		1	I will transport my children	Bonnors Ferry	83805
2023-02-28T20:27:05	Parent	1	1			1				School bus	Naples	83847
2023-02-28T20:26:26	Parent	2	2					1	1	I will transport my children	Bonnors Ferry	83805
2023-02-28T05:03:15	Parent	2	2	1				1		I will transport my children	Hope	83836
2023-02-27T23:16:45	Parent	2	2	1		1				School bus	Moyie Springs	83845
2023-02-27T21:07:42	Parent	2	2	1		1				I will transport my children	Bonnors Ferry	83805
2023-02-27T16:50:04	Parent	1	1						1	School bus	Sandpoint	83864
2023-02-27T14:00:58	Parent	1	1	1						I will transport my children	Sandpoint	83864
2023-02-27T06:56:19	Parent	1	1						1	I will transport my children	Bonnors Ferry	83805
2023-02-27T06:55:39	Parent	2	2			1		1		I will transport my children	Ponderay	83852
2023-02-27T05:50:06	Parent	1	1	1						I will transport my children	Bonnors Ferry	83805
2023-02-27T05:29:23	Parent	2	2	1	1					I will transport my children	Bonnors Ferry	83805
2023-02-27T05:27:25	Parent	1	1	1							Priest River	83856
2023-02-27T05:15:05	Parent	2	2	2						I will transport my children	Bonnors Ferry	83805
2023-02-27T05:13:18	Parent	3	3	2					1	School bus	Bonnors Ferry	83805
2023-02-27T05:05:08	Parent	1	1					1		School bus	Sandpoint	83864
2023-02-27T04:47:24	Parent	3	3	1				2		I will transport my children	Bonnors Ferry	83805
2023-02-27T04:33:53	Parent	1	1	1						I will transport my children	Sandpoint	83864
2023-02-27T04:30:44	Parent	1	1			1				I will transport my children	Bonnors Ferry	83805
2023-02-27T02:56:35	Parent	2	2	1	1					I will transport my children	Bonnors Ferry	83805
2023-02-26T22:25:38	Parent	1	1			1				I will transport my children	Bonnors Ferry	83805
2023-02-26T20:59:02	Parent	2	2			1			1	I will transport my children	Bonnors Ferry	83805
2023-02-26T19:38:56	Parent	2	2			1			1	I will transport my children	Bonnors Ferry	83805
2023-02-26T19:07:13	Parent	1	1			1				School bus	Sandpoint	83864
2023-02-26T16:28:37	Parent	1	1						1	I will transport my children	Naples	83847
2023-02-26T16:19:35	Parent	3	3	1				1	1	I will transport my children	Bonnors Ferry	83805
2023-02-26T16:05:25	Parent	3	3				1	1	1	I will transport my children	Sandpoint	83864
2023-02-26T03:02:43	Parent	2	2				1		1	I will transport my children	Bonnors Ferry	83805
2023-02-25T05:55:17	Parent	2	2		1		1			School bus	Clark Fork	83811
2023-02-23T20:52:25	Parent	2	2			2				I will transport my children	Priest River	83856
2023-02-23T20:29:53	Parent	2	2	1	1					I will transport my children	Bonnors Ferry	83805
2023-02-21T02:13:37	Parent	3	3	1				1	1		Sagle	83860
2023-02-19T14:46:37	Parent	1	1					1		School bus	Priest River	83856
2023-02-18T23:36:06	Parent	2	2			1		1		School bus	Sandpoint	83864
2023-02-17T21:59:12	Parent	1	1					1		School bus	Sandpoint	83864
2023-02-15T22:25:07	Parent	1	1		1					I will transport my children	Bonnors Ferry	83805
2023-02-15T21:42:20	Parent	0	0							I will transport my children	Moyie Springs	83845
2023-02-15T21:12:51	Parent	2	2	1	1					I will transport my children	Bonnors Ferry	83805
2023-02-14T23:15:12	Parent	2	2				1		1	I will transport my children	Moyie Springs	83845
2023-02-14T17:40:12	Parent	2	2				2			School bus	Bonnors Ferry	83805
2023-02-14T15:34:59	Parent	1	1			1				School bus	Bonnors Ferry	83805
2023-02-14T14:56:03	Parent	2	2	1	1					I will transport my children	Bonnors Ferry	83805
2023-02-14T12:37:46	Parent	2	2	1	1					I will transport my children	Bonnors Ferry	83805
2023-02-14T04:47:17	Parent	1	1			1				School bus	Sagle	83860
2023-02-13T05:38:50	Parent	2	2		1			1		I will transport my children	Sandpoint	83864
2023-02-13T02:59:28	Parent	1	1	1						I will transport my children	Bonnors Ferry	83805
2023-02-12T18:08:29	Parent	1	1	1						I will transport my children	Bonnors Ferry	83805
2023-02-12T04:00:00	Parent	3	3	1	1			1		School bus	Bonnors Ferry	83805

2023-02-12T00:57:44Z	Parent	1	1	1						School bus	Blanchard	83804	
2023-02-11T03:59:01Z	Parent	2	2	1		1				School bus	Bonnerr Ferry	83805	
2023-02-11T01:38:19Z	Parent	1	1			1				I will transport my children	Bonnerr Ferry	83805	
2023-02-10T06:32:16Z	Parent	2	2	1					1	School bus	Moyie Springs	83845	
2023-02-09T18:43:40Z	Parent	2	2			1		1		I will transport my children	Bonnerr Ferry	83805	
2023-02-09T17:39:13Z	Parent	4	4	4						I will transport my children	Bonnerr Ferry	83805	
2023-02-09T16:52:15Z	Parent	2	2	1				1		I will transport my children	Bonnerr Ferry	83805	
2023-02-09T14:27:01Z	Parent	3	3	1	1				1	School bus	Bonnerr Ferry	83805	
2023-02-09T06:02:03Z	Parent	1	1					1		I will transport my children	Bonnerr Ferry	83805	
2023-02-09T03:31:24Z	Parent	3	3	1	1			1		School bus	Bonnerr Ferry	83805-5611	
2023-02-08T18:42:56Z	Parent	0	0							School bus	Moyie Springs	83845	
2023-02-08T15:59:33Z	Parent	3	3			1	1		1	School bus	Priest River	83856	
2023-02-07T18:19:53Z	Parent	1	1					1		I will transport my children			
2023-02-04T17:44:01Z	Parent	4	4	1	1			1			Sandpoint	83864	
2023-02-03T06:11:47Z	Parent	2	2	2						I will transport my children	Bonnerr Ferry	83805	
2023-02-02T14:01:30Z	Parent	1	1					1		School bus	Bonnerr Ferry	83805	
2023-02-02T05:49:18Z	Parent	2	2			1			1	I will transport my children	Bonnerr Ferry	83805	
2023-01-29T09:54:13Z	Parent	2	2	1		1				School bus	Naples	83847	
2023-01-28T21:59:37Z	Parent	1	1						1	School bus	Bonnerr Ferry	83805	
2023-01-27T19:23:18Z	Parent	1	1	1						School bus	Bonnerr Ferry	83805	
2023-01-27T18:55:04Z	Parent	2	2	1		1				I will transport my children	Bonnerr Ferry	83805	
2023-01-27T04:11:59Z	Parent	2	2	1		1			1	School bus	Moyie Springs	83805	
2023-01-26T15:06:19Z	Parent	2	2	1	1					I will transport my children	Moyie Springs	83845	
2023-01-26T03:27:58Z	Parent	0	0							School bus	Moyie Springs	83845	
2023-01-25T21:57:51Z	Parent	3	3					1	1	1	School bus	Bonnerr Ferry	83805
2023-01-25T05:39:50Z	Parent	2	2			1			1	School bus	Bonnerr Ferry	83805	
2023-01-25T00:16:51Z	Parent	2	2			1			1	I will transport my children	Moyie Springs	83845	
2023-01-24T23:51:32Z	Parent	1	1						1	School bus	Bonnerr Ferry	83805	
2023-01-24T23:49:39Z	Parent	0	0							School bus	Bonnerr Ferry	83805	
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2023-01-24T16:06:32Z	Parent	2	2	1		1				School bus	Sandpoint	83864	
2023-01-24T13:36:59Z	Parent	3	3			1		1	1	School bus	Moyie Springs	83845	
2023-01-24T07:36:51Z	Parent	3	3	1	1			1		I will transport my children	Bonnerr Ferry	83805	
2023-01-24T04:57:01Z	Parent	2	2			1			1	School bus	Bonnerr Ferry	83805	
2023-01-24T03:08:55Z	Parent	3	3	1	1	1				I will transport my children	Bonnerr Ferry	83805	
2023-01-22T06:48:30Z	Parent	2	2			1	1			I will transport my children	Moyie Springs	83845	
2023-01-19T23:06:08Z	Parent	1	1			1				School bus	Ponderay	83852	
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2023-01-18T19:40:24Z	Parent	1	1					1		I will transport my children	Bonnerr Ferry	83805	
2023-01-18T06:09:13Z	Parent	2	2					1	1	I will transport my children	Bonnerr Ferry	83805	
2023-01-12T06:05:42Z	Parent	0	0								Sandpoint	83864	
2023-01-11T18:15:27Z	Parent	2	2	1					1	I will transport my children	Ponderay	83852	
2023-01-09T18:47:31Z	Parent	3	3	1					2	School bus	Bonnerr Ferry	83805	
2023-01-07T02:55:07Z	Parent	2	2	1					1	School bus	Bonnerr Ferry	83805	
2023-01-06T02:43:55Z	Parent	1	1					1		I will transport my children	Bonnerr Ferry	83805	
2023-01-04T05:49:16Z	Parent	1	1	1						School bus	Sandpoint	83864	
2023-01-03T00:18:36Z	Parent	1	1	1						I will transport my children	Naples	83847	
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2022-12-27T23:00:15Z	Parent	2	2	1	1					School bus	Bonnerr Ferry	83805	
2022-12-27T22:59:23Z	Parent	2	2						2	School bus	Bonnerr Ferry	83805	
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2022-12-27T22:55:45Z	Parent	2	2	1					1		Bonnerr Ferry	83805	
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2022-12-27T22:49:22Z	Parent	1	1						1	School bus	Bonnerr Ferry	83805	
2022-12-27T22:48:09Z	Parent	2	2					1	1	School bus	Bonnerr Ferry	83805	

2022-12-27T22:46:34	Parent	1	1	1						School bus	Bonnors Ferry	83805
2022-12-27T22:45:22	Parent	3	3	1	1	1				School bus	Bonnors Ferry	83805
2022-12-27T22:43:53	Parent	2	2	1				1		School bus	Moyie Springs	83845
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2022-12-27T22:40:03	Parent	2	2	1		1				School bus	Moyie Springs	83805
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2022-12-27T22:34:51	Parent	1	1	1						School bus	Bonnors Ferry	83805
2022-12-27T22:32:51	Parent	1	1			1				School bus	Bonnors Ferry	83805
2022-12-27T22:31:20	Parent	4	4	1		1	1	1	1	School bus	Moyie Springs	83845
2022-12-27T06:14:06	Parent	3	3				1		1	I will transport my children	Ponderay	83852
2022-12-26T23:08:04	Parent	1	1						1	School bus	Bonnors Ferry	83805
2022-12-21T14:05:35	Parent	1	1	1						I will transport my children		
2022-12-21T13:52:07	Parent	1	1	1						I will transport my children	Bonnors Ferry	83805
2022-12-20T04:51:35	Parent	1	1	1						I will transport my children	Bonnors Ferry	83805
2022-12-19T22:26:03	Parent	1	1			1				School bus	Bonnors Ferry	83805
2022-12-19T15:49:55	Parent	1	1						1	School bus	Sandpoint	83864
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2022-12-18T02:42:31	Parent	2	2				1		1	I will transport my children	Bonnors Ferry	83805
2022-12-18T01:48:46	Parent	3	3	1		1			1	School bus	Bonnors Ferry	83805
2022-12-18T00:41:06	Parent	1	1			1				I will transport my children	Bonnors Ferry	83805
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2022-12-16T14:50:12	Parent	2	2					1	1	School bus	Naples	83847
2022-12-15T15:21:08	Parent	2	2	2						School bus	Sagle	83860
2022-12-15T07:33:24	Parent	2	2	1					1	I will transport my children	Bonnors Ferry	83805
2022-12-14T23:19:59	Parent	2	2			1			1	School bus	Moyie Springs	83845
2022-12-14T21:15:03	Parent	1	1	1						I will transport my children	Bonnors Ferry	83805
2022-12-14T20:46:05	Parent	2	2	1			1			School bus	Bonnors Ferry	83805
2022-12-14T03:13:22	Parent	0	0							I will transport my children	Troy	59535
2022-12-13T19:01:42	Parent	1	1						1	I will transport my children	Bonnors Ferry	83805
2022-12-13T01:01:41	Parent	2	2	2						I will transport my children	Bonnors Ferry	83805
2022-12-12T02:16:03	Parent	2	2			1	1			School bus	Bonnors Ferry	83805
2022-12-11T17:10:41	Parent	2	2	1	1					I will transport my children	Sandpoint	83864
2022-12-11T15:18:28	Parent	3	3	1	1	1				I will transport my children	Sandpoint	83864
2022-12-11T00:36:20	Parent	0	0							I will transport my children	Sagle	83860
2022-12-10T21:30:21	Parent	3	3			1			2	I will transport my children	Sandpoint	83864
2022-12-10T16:15:36	Parent	1	1	1						School bus	Bonnors Ferry	83805
2022-12-10T04:50:47	Parent	1	1	1						I will transport my children		
2022-12-10T04:38:47	Parent	4	4			1	1	2		I will transport my children	Bonnors Ferry	83805
2022-12-09T19:39:30	Parent	2	2	1	1					School bus	Bonnors Ferry	83805
2022-12-09T17:17:50	Parent	3	3			1		2		School bus	Moyie Springs	83845
2022-12-09T16:55:17	Parent	2	2			1		1		School bus	Bonnors Ferry	83805
2022-12-09T08:01:58	Parent	2	2			1			1	I will transport my children	Bonnors Ferry	83805
2022-12-09T02:52:04	Parent	0	0							School bus	Bonnors Ferry	83805
2022-12-09T01:08:20	Parent	2	2	1	1					School bus	Bonnors Ferry	83805
2022-12-08T23:08:53	Parent	2	2						2	I will transport my children	Bonnors Ferry	83805
2022-12-08T21:34:52	Parent	2	2	1		1				I will transport my children	Naples	83847
2022-12-08T21:04:04	Parent	3	3	1		1			1	School bus	Moyie Springs	83845
2022-12-08T18:56:46	Parent	3	3	1				1	1	School bus	Sagle, ID	83860
2022-12-08T03:20:12	Parent	2	2	1				1		School bus	Sandpoint	83864
2022-12-08T02:37:10	Parent	1	1						1	I will transport my children	Naples	83847
2022-12-07T21:51:02	Parent	2	2			1			1	School bus	Bonnors Ferry	83805
2022-12-07T19:05:34	Parent		0							I will transport my children	Bonnors Ferry	83845
2022-12-07T05:40:35	Parent		0							School bus	Moyie Springs	83845
2022-12-07T02:24:15	Parent		0							I will transport my children	Bonnors Ferry	83805
2022-12-06T05:11:24	Parent	3	3					1	2	School bus	Sandpoint	83864
2022-12-06T04:11:45	Parent	3	3					1	2	School bus	Sandpoint	83864
2022-12-05T06:38:00	Parent	2	2			2				School bus	Bonnors Ferry	83805-4403
2022-12-05T02:36:04	Parent	2	2					1	1	School bus	Bonnors Ferry	83805
2022-12-05T02:33:28	Parent	2	2	1				1		School bus	Bonnors Ferry	83805
2022-12-05T02:29:29	Parent	1	1	1						I will transport my children	Moyie Springs	83845

2022-12-04T17:53:21Z	Parent	1	1	1						School bus	Naples	83847	
2022-12-04T04:48:17Z	Parent	1	1						1	I will transport my children	Bonnerr Ferry	83805	
2022-12-04T04:07:55Z	Parent	2	2	1	1					School bus	Bonnerr Ferry	83805	
2022-12-04T01:46:16Z	Parent	1	1	1						I will transport my children	Troy	59935	
2022-12-03T23:50:57Z	Parent	1	1				1			School bus	Moyie Springs	83845	
2022-12-03T23:44:39Z	Parent	2	2	1	1					School bus	Bonnerr Ferry	83805	
2022-12-03T22:00:30Z	Parent	2	2	1				1		I will transport my children	Bonnerr Ferry	83805	
2022-12-03T21:12:01Z	Parent	3	3		1	1		1		School bus	Bonnerr Ferry	83805	
2022-12-03T21:02:40Z	Parent	2	2			1		1		I will transport my children	Spirit Lake	83869	
2022-12-03T20:51:18Z	Parent	6	6	1	1	1	1	1	1	I will transport my children	Bonnerr Ferry	83805	
2022-12-03T19:55:49Z	Parent	2	2		1	1				School bus	Naples	83847	
2022-12-03T19:53:26Z	Parent	2	3	1		1	1			I will transport my children	Bonnerr Ferry	83805	
2022-12-03T18:27:30Z	Parent	3	3	1	1			1		I will transport my children	Bonnerr Ferry	83805	
2022-12-03T18:27:14Z	Parent	1	1	1						I will transport my children	Bonnerr Ferry	83805	
2022-12-03T17:35:53Z	Parent	1	1				1			I will transport my children	Bonnerr Ferry	83805	
2022-12-03T16:51:53Z	Parent	1	1	1						School bus	Bonnerr Ferry	83805	
2022-12-03T16:39:47Z	Parent	1	1	1						I will transport my children	Bonnerr Ferry	83805	
2022-12-03T16:19:37Z	Parent	3	3	1	1			1		I will transport my children	Bonnerr Ferry	83805	
2022-12-03T15:52:03Z	Parent	2	2		1			1		I will transport my children	Bonnerr Ferry	83805	
2022-12-03T15:29:16Z	Parent	2	2		1			1		I will transport my children	Bonnerr Ferry	83805	
2022-12-03T02:51:26Z	Parent	1	1					1		I will transport my children	Moyie Springs	83845	
2022-12-03T02:39:45Z	Parent	2	2		1			1		School bus	Bonnerr Ferry	83805	
2022-12-03T02:27:43Z	Parent	1	1					1		I will transport my children			
2022-12-03T00:06:58Z	Parent	1	1	1						I will transport my children	Bonnerr Ferry	83805	
2022-12-02T22:17:24Z	Parent	1	1	1						School bus	Moyie Springs	83845	
2022-12-02T21:23:27Z	Parent	2	2				1	1		School bus	Moyie Springs	83845	
2022-12-02T19:18:48Z	Parent	1	1					1		I will transport my children	Bonnerr Ferry	83805	
2022-12-02T19:18:00Z	Parent	3	3	1				1	1	I will transport my children	Bonnerr Ferry	83805	
2022-12-02T15:52:42Z	Parent	4	4	2			1		1		Bonnerr Ferry	83805	
2022-12-02T15:43:44Z	Parent	1	1			1				School bus	Sandpoint	83864	
2022-12-02T15:25:32Z	Parent	1	1						1	School bus	Moyie Springs	83845	
2022-12-02T01:50:56Z	Parent		0							I will transport my children	Bonnerr Ferry	83805	
2022-12-01T23:20:44Z	Parent	3	3					1	1	1	I will transport my children	Bonnerr Ferry	83805
2022-12-01T22:53:32Z	Parent	1	1						1		School bus	Bonnerr Ferry	83805
2022-12-01T14:16:34Z	Parent	1	1			1				I will transport my children	Sandpoint	83846	
2022-12-01T04:04:21Z	Parent	3	3	1	1				1		School bus	Sandpoint	83864
2022-11-30T22:42:06Z	Parent	1	1	1						I will transport my children			
2022-11-30T21:42:25Z	Parent	3	3				1		1	1	School bus	Bonnerr Ferry	83805
2022-11-30T04:14:04Z	Parent	3	3	2					1	I will transport my children	Bonnerr Ferry	83805	
2022-11-29T19:15:11Z	Parent	2	2	1	1					I will transport my children	Bonnerr Ferry	83805	
2022-11-29T16:36:54Z	Parent	1	1	1					1	I will transport my children	Bonnerr Ferry	83805	
2022-11-29T16:28:54Z	Parent	2	2	1					1		Bonnerr Ferry	83805	
2022-11-28T22:06:08Z	Parent	2	2	1	1					School bus	Bonnerr Ferry	83805	
4/10/2023	Parent	1	1	1						I will transport my children	Bonnerr Ferry	83805	
5/16/2023	Parent	2	2						1	1	Sandpoint	83864	
5/2/2023	Parent	2	2			1			1	School bus	Moyie Springs	83845	
5/2/2023	Parent		0										
5/3/2023	Parent	1	1			1				School bus	Bonnerr Ferry	83805	
5/6/2023	Parent	2	2	1					1	I will transport my children	Troy	59935	
6/3/2023	Parent	2	2	1	1					School bus	Moyie Springs	83845	
6/3/2023	Parent	3	3				1	1	1	School bus	Bonnerr Ferry	83805	
6/8/2023	Parent	3	3	1				1		1	I will transport my children	Bonnerr Ferry	83805
6/8/2023	Parent	2	2	1					1	School bus	Moyie springs	83845	
6/30/2023	Parent	2	2		1				1		Naples	83847	
6/23/2023	Parent	1	1					1			Bonnerr Ferry	83805	
8/1/2023	Parent	1	1				1			I will transport my children	Sandpoint	83864	
8/3/2023	Parent	2	2						1	1	I will transport my children	Bonnerr Ferry	83805
8/9/2023	Parent	1	1						1	School Bus	Moyie Springs	83845	
8/9/2023	Parent	1	1	1						School Bus	Bonnerr Ferry	83805	
8/9/2023	Parent	1	1	1						I will transport my children	Bonnerr Ferry	83805	
8/10/2023	Parent	1	1	1						School Bus	Bonnerr Ferry	83805	
8/10/2023	Parent	4	4	1	1				1	1	I will transport my children	Bonnerr Ferry	83805
8/10/2023	Parent	1	1	1							Bonnerr Ferry	83805	
8/10/2023	Parent	1	1						1	I will transport my children	Bonnerr Ferry	83805	

Appendix D: IPCSC Closure Protocol



Closure Protocol

Idaho Public Charter School Commission

514 West Jefferson Street, Ste. 303

Boise, Idaho 83702

208-332-1561

pcsc@osbe.idaho.gov

Alan Reed, Chairman

Jacob Smith, Director

Purpose

This document provides guidance on the public charter school closure process.

Authority

Title 33, Chapter 52 of Idaho Code, known as the Charter School Act provides for public charter school operations based on a contractual agreement between a charter school board of directors and a state authorized chartering entity, such as the Idaho Public Charter School Commission (IPCSC).

Operating contracts, known as Performance Certificates are granted by state authorized chartering entities to the governing board of a non-profit corporation that serves as the charter holder. Performance certificates are limited to five-year terms.

Closure protocol is enacted when:

- an authorized chartering entity chooses to non-renew a school's charter pursuant to I.C. § 33-5209B;
- an authorized chartering entity chooses to exercise its right to revoke a charter pursuant to I.C. § 33-5209C; or
- a charter holder chooses to relinquish its charter by approval of a resolution.

Each authorized chartering entity is required to maintain a closure protocol and is tasked with oversight of the closure process.

If closure is due to an IPCSC nonrenewal or revocation decision, written notice will be issued to the school within 14 days of the decision and this closure protocol must begin within 5 days.

Roles

Authorizer: the authorized chartering entity is responsible to maintain closure protocol and to oversee the closure process.

Charter Holder: the charter holder is responsible to ensure that all closure tasks are complete and all deadlines are met. The school is responsible for any and all costs associated with closure.

Note

Please note that every closure situation is different. This guidance document may need to be expanded or adjusted to accommodate the specifics of a particular closure.

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I. Closure Protocol Team

A. Initial Meeting

within 5 business days of the date on which written notice of closure is issued, a meeting of the closure protocol team will be held.

B. Team Members

The Closure Protocol Team shall meet at least once a month between the date of the decision to non-renew, revoke, or relinquish the charter and the final dissolution of the board. Meetings shall be organized and chaired by the “team lead”. The team lead is also responsible for compiling meeting minutes and all documentation for the final closure report.

Required members of this team shall include:

1. The school’s Board Chair;
2. The school’s Lead Administrator;
3. The school’s Business Manager;
4. The IPCSC Director
5. A Team Lead (appointed by the IPCSC Director); and
6. The State Department of Education’s School Choice Coordinator.
7. Additional members may be added to the closure protocol team by mutual agreement of the required members.

C. Subcommittees

1. Subcommittees shall be established for the purpose of managing closure tasks in the following areas:
 - i. Communication – student, teacher, family
 - ii. Financial – vendors and assets
 - iii. Business – employer and corporation
 - iv. Records – student and employee records

D. Meeting Agenda

The meeting agenda for the initial meeting of the closure protocol team shall include the following:

1. Review of the closure protocol guidance document;
2. Review of the final closure report template;
3. Review the roles and responsibilities of each party and subcommittee throughout the process;
4. Assign liaisons from both the school and the IPCSC to the Closure Protocol Team and any subcommittees;
5. Establish due dates for all tasks listed in Section I.E of these procedures; and
6. Review notification letter drafted by IPCSC Staff.

E. Important Dates

Due dates to be established at the initial meeting of the Closure Protocol Team shall include the following:

1. The date of the school's last allowable draw on public funds;
2. The date on which the school shall cease to provide services to students;
3. The date by which records to be retained beyond the closure date are to be transferred the authorizer;
4. The date by which all assets purchased with federal dollars must be transferred to the authorizer for redistribution to other charter schools;
5. the date on which all employee contracts are to be ended and all communication on behalf of the school must cease;
6. The date on which benefits will end;
7. The date by which the final audit must be completed;
8. The date by which all financial activity must be ended, including cutting the final checks and closing all bank accounts;

9. The date by which all W2s will be issued for the school's final operating year; and
10. The date by which the non-profit corporation must be dissolved.

Communication

A. Initial Stakeholder Notification

1. Within 7 business days of the date written notice of closure is issued, the school is responsible to issue a letter (drafted by the IPCSC) notifying stakeholders of closure. This letter shall minimally include:
 - a. Where and when the final order will be posted online for transparency of the reasons for closure;
 - b. The last date of student services;
 - c. Transfer procedures;
 - d. Explanation of the appeal process and when a decision regarding an appeal would be published; and
 - e. Contact information for the school's administrator and the IPCSC.
2. The school may choose to include a supplemental letter drafted by the school's board, and if so, such draft must be provided to the IPCSC prior to distribution to stakeholders.
3. The school is responsible to distribute the IPCSC's letter (and the school board issued supplemental letter, if applicable) to the following recipients:
 - a. All Parents of current students and all parents currently on a waitlist;
 - b. All Teachers, Staff, and Volunteers;
 - c. All Vendors with whom the school has an active contract or has engaged with in the past 12 months;
 - d. All Lease and Loan/bond holders; and
 - e. Any Educational Services Providers with whom the school contracts.
4. The authorizer is responsible to issue a letter informing stakeholders of the closure situation to the following recipients:

- a. All potentially impacted school districts and charter schools;
 - b. The State Department of Education;
 - c. The State Board of Education;
 - d. The Office of the Governor;
 - e. The Public Employment Retirement Service of Idaho;
 - f. The chairpersons of the House and Senate Education committees; and
 - g. The Senators and Representatives serving the state legislature on behalf of the district in which the school maintains student occupied facilities or business offices.
5. Within 7 days of the date written notice of closure is issued, the IPCSC's letter informing stakeholders of the closure situation shall be posted in a prominent location on the school's website and the IPCSC's website.

B. Staff Meeting

1. Within 7 days of the date written notice of closure is issued, the school's administrator, board chair, and business manager shall hold a meeting with all staff to discuss the following:
 - a. Media contact protocol
The Director of the IPCSC is the authorized media contact for the IPCSC. The school is encouraged to establish a single point of contact to manage public relations on behalf of the school.
 - b. Maintenance of normalcy (to the best possible level) for students through the last day of student services
All instructional and student services are required to be provided in full through the last day the school is allowed to provide such services. The student experience should remain as normal as possible through this process. It is recommended that the school provide guidance for teachers and staff early-on to ensure common language and tone is used when discussing this situation with students and families.
 - c. End of Employment Impact
This date is established by the Closure Protocol Team. When determining the end of contract dates, please consider the impact of this date on health

insurance and PERSI. When at all possible, August 31st is recommended as this will allow teachers who re-employ at another school the best opportunity for uninterrupted health insurance coverage. However, this decision must be balanced with the urgency of the closure and the school's obligation to spend as little as necessary during the closure period.

2. The meeting agenda for this staff meeting should include the following:
 - a. Notification of closure timeline and timeline of parallel appeal if the school has chosen to or is considering appealing the closure decision.
 - b. Review of media protocol and how to discuss the issue with parents and students.
 - c. Date of last paychecks and whether/who will remain on staff after end of student services and end of contract dates.
 - d. Timeline for more information regarding sick leave, vacation time, and health insurance; Cobra may not be available when the charter school providing the original health insurance ceases to exist.
 - e. Timeline for more information regarding any impacts to PERSI; Employees whose last place of work prior to retirement was the school being closed may lose the ability to transfer accrued sick leave into funds used for medical coverage.
 - f. Timeline for winding-down and transition of duties, including, but not limited to facility access and security, access to email and software, hardware returns, and asset management of furniture, fixtures, equipment, and curriculum.
 - g. Social emotional services for staff and students if the school has chosen to make such available; We acknowledge that closure can be traumatic for staff and students. Schools are encouraged to consider making additional counseling services available.
 - h. Assistance with employment transition for staff (such as access to hiring fairs or letters of recommendation) if the school has chosen to make such available.

C. Ongoing Communication

1. Additional communication with stakeholders will be necessary throughout the closure process.
2. The Communication subcommittee is responsible for ensuring that any necessary communication is timely and accurate.

F. Financial Dissolution

A. Expenses

1. Within 15 business days of the date on which written notification of closure was issued a meeting shall be held between the school's business manager, the IPCSC's Finance Manager, and the Team Lead.
2. Additional attendees (such as the school's auditor) may be invited to the meeting by mutual agreement of both required attendees. Any related costs are the responsibility of the school.
3. No later than the start of the scheduled meeting, the school's business manager shall make the following available to the IPCSC:
 - a. A list of every vendor the school has paid in the last 12 months;
 - b. A copy of all arrangements with vendors including: contracts, service agreements, grants, and/or MOUs with all services providers that are currently active or that have been active in the past 12 months;
 - c. A copy of all lease agreements and all long-term loans;
 - d. A list of all insurance policies held by the school (including liability, directors and officers, worker's comp, etc.), including company, policy number, and coverage specifics; and
 - e. All bank statements for the previous 12 months.
4. The meeting agenda for this meeting shall include the following:
 - a. A review of statute, rule, policy, and regulations related to closure as presented by the Closure Team Lead.
This part of the discussion should consider requirements of the IRS, the Department

of Labor, the Government Accounting Standards Board, as well as the Idaho Charter School Act and rules and policy established by the State Board of Education and the State Department of Education.

- b. A review of projected cash flow through end of operations as presented by the school's Business Manager.
There will be time to revise this initial projection as closure progresses, and the numbers are expected to shift throughout the process, but this exercise establishes a starting place. Please consider the last allowable draw of funds, payroll through end of contracts, and note that there may be additional closing costs, such as a PERSI buy out, storage costs, or penalties on early lease termination.
- c. Development of a plan for immediately reducing spending to necessities only, which may require board action to suspend or change policies to allow for changes in who has spending authority and at what amounts.
- d. Prioritization of payment of anticipated expenditures, pursuant to Idaho Code.
- e. Documentation of a list of items requiring follow-up and who is responsible for the workload or costs.
- f. Establishment of approximate deadlines for when each account is to be closed.

5. Following the initial meeting, the school's Business Manager shall be responsible to provide the following documentation:

- a. Verification that the school's account has been paid in full with each vendor as accounts are closed;
- b. Verification that the school has met with PERSI and has established a final transmission date;
- c. Documentation that any outstanding PERSI fees are paid;
- d. Verification that the school has met with the board approved auditor and has established a final audit timeline. Note that the timing of this audit may be later than usual; and
- e. Verification of end dates for leases and liability coverage (including property and directors/officers).

B. Accounting of Assets

- i. The IPCSC shall provide to the school a written guidance document with regard to the sale and dissolution of assets.
- ii. The school shall be responsible to provide the IPCSC and the SDE with a full inventory of all physical assets owned by the corporation within 30 days of the date on which the notice of closure was issued.
- iii. The inventory shall include:
 - a. A description of the item;
 - b. The fund with which each item was purchased; and
 - c. An estimate of the current value of the item.
- D. The Team Lead, the IPCSC's Finance Manager, a representative from the SDE, and the school's Business Manager shall meet to review this inventory within 15 days of receipt of the inventory, and may verify accuracy via thorough on-site review.

C. Dissolution of Assets

1. All viable special education testing materials shall be distributed to the SDE for redistribution to charter schools based on the agency's determination of need.
2. Property owned by the ESP will be claimed by the ESP. The lease by which this equipment was provided to the school must include an itemized inventory and shall be provided to the IPCSC.
3. Any items purchased with federal funds (excluding special education testing materials) shall be returned to the IPCSC for redistribution to other charter schools. The IPCSC shall retain record of what was received and to whom it was redistributed.
4. The school is responsible to arrange for delivery of assets in an organized and well-labeled manner.
5. All assets purchased with state funds shall be liquidated to the greatest degree possible. Please see the IPCSC's guidance on the sale and dissolution of assets for procedural expectations.
6. When all assets have been redistributed and liquidated, and all creditors have been paid, any remaining funds shall be returned to the Public School Income Fund via the State Department of Education.

D. Reporting

1. The school shall ensure that an audit completed by an independent auditor is conducted, the audit report is approved by the school's board, and submitted to both the State Department of Education and the authorizer.
2. The school shall ensure that all documentation required to dissolve the school as a business is filed with the IRS, including dissolution of the 501c3.
3. After the sale of assets, and the all checks are cut, any remaining funds shall be returned to the State Department of Education for distribution to operational schools.
4. File final tax reports.
5. Issue W2s for previous tax year.

IV – Records Management

i. Records Retention Procedures

1. The school's Lead Administrator is responsible to ensure the proper retention and destruction of records in accordance with the State of Idaho's records retention schedule.
2. The public charter school shall make every effort to transfer all active student records (including the cumulative file and the special education file) to the student's next school of choice prior to the date on which records are scheduled to transfer to the authorizer.
3. The public charter school shall ensure that every student file (active or inactive) includes an official transcript (signed, embossed, etc.) or final report card and a record of where and when the student's records were transferred out of the public charter school's care. This information shall be compiled in a single spreadsheet.
4. The public charter school shall ensure that all records to be transferred to the authorizer (cumulative and special education) are scanned into an electronic format. Costs incurred are the responsibility of the school.

5. The public charter school shall ensure that all records are transferred to the authorizer via a secure file transfer protocol.
6. No employee or former employee of the school shall retain copies or have access to student, employee, or financial records after the employee's end of contract date.

ii. Records to be Retained

1. Student Records:

- a. Student cumulative files shall be retained for five years beyond the student's exit date.
- b. Student special education files shall be retained for five years beyond the student's exit date.
- c. Official transcripts or final report cards for all students who attended the school shall be retained permanently and shall include the name and address of the student, the name of the student's parent(s)/guardian(s), the student's date of birth, the courses attempted by the student and grades earned by the student.
- d. Record of student records transfer shall be retained permanently;

2. Personnel Records:

- a. Personnel files shall be retained for five years beyond the employee's termination date.
- b. Personnel files shall include the name, address, and contact information of the employee; employment agreements or contracts signed by the employee, verification of certification (if applicable), and all employee evaluations. No other documentation shall be retained.

3. Financial Records:

- a. Monthly expenditure reports for the five years preceding the school's closure date shall be retained. Records shall be destroyed after five years.
- b. Monthly deposit records for the five years preceding the school's closure date. Records shall be destroyed after five years.
- c. All bids received and contracts awarded in the five years preceding the school's closure date. Records shall be destroyed after five years.

- d. Medicaid reimbursement records for seven years prior to the school's closure date. Records shall be destroyed after seven years.
 - e. Bank statements for all accounts for five years preceding the school's closure date. Records shall be destroyed after five years.
 - f. Tax documents shall be retained for the seven years prior to the school's closure date. These documents include but are not limited to IRS forms 941 and 1099. Records shall be destroyed after seven years.
 - g. Annual financial audit reports and annual board approved budgets shall be retained permanently for all operational years. These documents are submitted to the IPCSC annually, and may not need to be re-submitted.
4. Governance Records:
- a. All meeting agendas shall be retained permanently.
 - b. All meeting minutes shall be retained permanently.
 - c. A complete copy of the most recent set of board policy shall be retained permanently.
 - d. A copy of the board bylaws and articles of incorporation shall be retained permanently.
5. School Culture Records
- a. The school's lead administrator shall be responsible to make arrangements for the permanent retention of all school newspapers, yearbooks, and student handbooks through the Idaho Historical Society. The school is responsible for all costs incurred.
6. Records Requests After Closure
- a. The IPCSC shall manage records requests for student transcripts and for personnel files after the school has closed.
 - b. The school shall ensure that the school's URL redirects to the IPCSC's records request page for a minimum of 3 years after the school's closure, at the school's expense.

V. Governing Board

iii. Final dissolution

1. Final Board Meeting

- a. In accordance with OML notice a final meeting of the governing board and pursuant to I.C. § 30-30-1001, a vote to dissolve a nonprofit corporation shall be properly noticed and accompanied by the dissolution plan. In this case, the dissolution plan is the closure protocol, which should be near completion by the time this motion is made. This section of Idaho Code also requires that the agenda state that the purpose, or one of the purposes, of the meeting is to consider a resolution to dissolve of the non-profit corporation.
- b. I.C. § 33-5212 addresses the order in which payments shall be made, and state that any remaining assets after all creditors have been paid shall be distributed to the Public School Income Fund. This information should be incorporated into the dissolution motion as it is required to be noticed by the Non-Profit Corporation Act.
- c. A vote in favor of dissolution passes with a majority vote of the board directors.
- d. A copy of the resolution must be provided to the IPCSC with 24 hours of the vote.

2. Meeting Agenda

- a. Approval of the financial audit report (if not already complete).
- b. Approval of any final contracts to be paid (i.e. for the Business Manager to return at the end of the calendar year to prepare final tax documents and distribute to employees).
- c. Appointment of a designee to file dissolution of the school's 501c3 with the IRS and articles of dissolution with the Idaho Secretary of State.
- d. Appointment of a designee to complete any and all final activities that may be necessary.
- e. Signature of any final checks.

3. Articles of Dissolution

- a. Pursuant to I.C. § 30-30-1003, after the dissolution has been authorized, a designee (identified in the dissolution plan) shall files articles of dissolution with the Idaho

Secretary of State. These articles shall minimally include:

- i. The name of the corporation;
 - ii. The date dissolution was authorized;
 - iii. A statement that dissolution was approved by a sufficient vote of the board.
- b. A corporation is effectively dissolved as of the date of its articles of dissolution.
 - c. The school shall provide a copy of the filed articles of dissolution to the IPCSC.
4. A dissolved corporation may continue its corporate existence but may not carry on any activities except those appropriate to wind up and liquidate its affairs.

B. Claims against a dissolved Corporation

- iv. After the date on which the articles of dissolution are filed, the corporation may dispose of the known claims against it by sending written notice, pursuant to I.C. § 30-30-1005. Written notice must include:
 - a. A description of the information that must be included in a claim;
 - b. A mailing address where a claim may be sent;
 - c. The deadline, by which the dissolved corporation must receive the claim; and
 - d. State that the claim will be barred if not received by the deadline, which may not be fewer than one hundred twenty (120) days from the effective date of the written notice.
- v. The corporation must address any unknown claims against it by publishing a notice Pursuant to I.C. 30-30-1006. The notice must:
 1. Be published one (1) time in a newspaper of general circulation in the county where the dissolved corporation's principal office is or was located, or, if none in this state, in Ada county;
 2. Describe the information that must be included in a claim and provide a mailing address where the claim may be sent; and
 3. State that a claim against the corporation will be barred unless a proceeding to enforce the claim is commenced within five (5) years after publication of the notice.

- vi. Claims will be enforced if the corporation's assets have be distributed in liquidation to any party other than a creditor. A claim may be made by a creditor against the recipient, not to exceed the amount received by the recipient.

C. Reporting

1. The school shall ensure that all state and federal reporting is complete prior to dissolution. Verification of completed reports shall be made by the IPCSC. Required reports include, but are not limited to the following:
 - a. ISEE final data upload including, but not limited to student, course, teachers, and financial data sets;
 - b. Federal programs final reporting;
 - c. Grant final reporting; and
 - d. The school shall ensure that dissolution of the charter holder's non-profit organization is filed with the secretary of state and shall provide the IPCSC with a copy of this filing;
2. The school shall ensure that the dissolution of the school's 501c3 is on file with the IRS and shall provide the IPCSC with a copy of this filing.

VI. Final Closure Report Outline

Throughout the closure protocol process, the Closure Team Lead will collect the required documentation and build a final report. The final report will be permanently retained by IPCSC and posted on the IPCSC's website.

i. Cover Sheet

1. A final closure report must include a cover sheet with the following information:
 - a. The legal name of the school;
 - b. The legal name of the charter holder;
 - c. The address(s) that the school occupied at time of closure;
 - d. Contact information for future questions;

- e. The following links and a statement that more information can be found at these locations,
 - i. [PCSC webpage for this school],
 - ii. [webpage for the meeting at which the charter was approved],
 - iii. [webpage for the meeting at which the charter was nonrenewed or revoked, if applicable], and
 - iv. [webpage for any related hearings]; and
- f. A description of where requests for student transcripts can be made after closure.
- g. A list of the complete closure protocol team.
- h. A list of the following key dates:
 - i. The date on which the charter was approved;
 - ii. The first and final dates on which the school was authorized to serve students;
 - iii. The date on which the school received its final distribution of state funding;
 - iv. The date on which teacher contracts ended; and
 - v. The date on which the charter holder's corporation was dissolved.

B. Required Attachments, Redacted

1. Final IPCSC Closure Order
2. Final appeal decision (if applicable)
3. IPCSC Notification of Stakeholders Letter
4. List of all vendors, including the name and address of the vendor, a description of the services provided/purchased, and the date on which the IPCSC verified account closure.
5. A list of insurance coverages, including company and the last date of coverage (including health, liability, etc.)
6. A list of all contracts, service agreements, grants, and MOUs to be retained by the IPCSC, including verification of date received.
7. A list of all lease agreements and all long-term debt held by the school at the beginning of the closure protocol, including the company and amount.
8. Documentation of the termination of any leases or loans.
9. Final bank statements indicating account closure.

10. Expense reports for the 12 months preceding dissolution.
11. A copy of the final check cut to the SDE, if applicable.
12. Inventory of assets, including the fund with which each item was purchased, the date of purchase, the estimated value.
13. For assets purchased with federal dollars, also include the final recipient of the asset, and the date of transfer.
14. The charter holder's final dissolution resolution.
15. A copy of the articles of dissolution.
16. A copy of the 501c3 dissolution notification.
17. A copy of the newspaper notice to unknown claimants.
18. Meeting minutes from all meetings of the closure protocol team and all subcommittee meetings attended by the Closure Team Lead.
19. Any other documentation that may provide important details.