



Guidance

New School Start-Up/Implementation Fund

Welcome

Congratulations on your admittance to USU's portfolio of charter schools. We look forward to our association with you as you diligently pursue high levels of learning in your students, and as you seek to be a "learning organization that learns." The purpose of this document is to offer you guidance in pursuing "new school start-up funds." If you elect to pursue these funds as potentially identified in your application, then reach out to David Forbush if questions/needs arise (435) 797-9050 | david.forbush@usu.edu.

Background Information

The purpose of new school start-up funds is to provide financial assistance for planning, program design, and initial implementation of new charter schools, including satellite and replication campuses as addressed in UCA-[53F-2-705](#) and USBE Rule [R277-554-2](#). Currently, \$400,000 is the maximum amount that can be received. The maximum amount is dependent on projected enrollment.

Procedural Steps

Step 1: A fully signed charter school agreement with the USU Board of Trustees must be in place before proceeding with application for start-up funds.

Step 2: Using a secure system such as Moveit submit the start-up/implementation documents found at <https://cehs.usu.edu/csf/charter-school-authorizing> to the Utah State Board of Education (USBE) and in care of schoolfinance@schools.utah.gov

- DUNS #
- Form W-9
- EFT form and see bank account instructions. This information allows the USBE to disburse start-up money to your school via direct deposit. Note that setting up direct deposit can take 4-6 weeks.

The USBE School Finance Department will let you know via email when your school's bank account is in place.

Submit a financial Agreed Upon Procedure (AUP) if your local education agency (LEA) has already exceeded \$350,000 in revenues and/or expenditures. Revenues and/or expenditures could include, but is not limited to, loans, local, state, and/or federal funds. The AUP must be completed by an external auditor.” When needed, an AUP is set up with the State of Utah Auditor’s Office. A guide for setting up your AUP is located at <https://resources.auditor.utah.gov/s/article/Forms-Manuals-Guides>. See the two AUP sections.

Step 3: Complete the [new-school-request \(1\).pdf \(usu.edu\)](#) and email it to david.forbush@usu.edu. He will obtain USU’s signature and then email it to Kristin.Campbell@schools.usu.gov at the USBE.

Step 4: Wait for USBE staff to review the documents in step 2. A successful review process results in your school receiving an assigned school number which is recognized by the USBE system, and in other state systems.

Step 5: Develop your start-up/implementation grant application by directly accessing the application made available by the Utah State Legislature, and administered by the Utah State Charter School Board <https://cehs.usu.edu/csf/files/charter-schools/start-up-grant-application-revised-05-25-23.pdf>. Note that you completed aspects of this application when completing your application seeking authorization from USU. Copy and paste materials as appropriate from your application, and then supply other needed information required of the start-up fund application.

Step 6: Submit your start-up application which is located in the charter school application you submitted to USU during the authorization process. Include your signed charter school agreement with your start-up application.