

BLUE OAK

John Bohannon, Director, Secondary & Alternative Education:

The following are my observations from the visit to The Blue Oak School on April 21, 2015.

Recruitment/Enrollment

Blue Oak's enrollment at the time of the site visit was 432 students in K-8 grades. Blue Oak's demographics show 76 percent white students, 13 percent Hispanic, 7 percent two or more races and 4 percent African American. Including newly enrolled students, Blue Oak had 4 English Learners and approximately 11 percent students with disabilities.

Governance Structure

Louthea Griffin served as chair of the Blue Oak Charter Council for the 2014-2015 school year. It was her 3rd year as a board member. Also serving with prior experience were Lyn Harrod, community member and Joc Clark, parent. New to the Board were 2 parents Brian Lindaman and Gregor Kraus and 2 new community members Lloyd Dowell and Pamela Boeger. Blue Oak experienced a high turn-over year with 5 seats that needed to be filled for the 2015-2016 school year. At the time of the site visit Blue Oak was actively recruiting candidates for its board.

Nathan Rose is completing his fourth year as the Executive Director of Blue Oak. In addition, Blue Oak added Stephanie Nichols as Student Services Director and Shannon O'Laughlin as Education Director. Both Stephanie and Shannon are working toward obtaining an administrative credential. Cyd Orneallas is Blue Oak's current business manager.

Joanne Parsley, Director, Curriculum and Instruction: LCAP Update

The 2014-2015 school year represented the first time that school districts and charter schools developed Local Control Accountability Plans (LCAP) to show how they were utilizing supplementary funds in the new Local Control Funding Formula (LCFF). This change provides a focus for Chico Unified's annual visits and reports. The following is an update on the actions identified in Blue Oak's LCAP plan.

Blue Oak Goal No. 1: Increase the number of students who score proficient or above in English Language Arts and math

- Coordinate the SST process and coach teachers in improving learning outcomes with individual students using the SST process. With the creation of a better SST process in conjunction with a new Student Service Director and two new intervention teachers (paid through Title I funds), Blue Oak is working to improve

student outcomes. Intervention teachers are coaching and supporting teachers to meet the needs of students on a more individual basis. New Student Services Director Stephanie Nichols has created a more robust process for providing Tier 2 support (In the 3 Tier Rtl model).

- Employ reading specialist: hire two reading aides: The reading intervention teacher is funded through Title I not LCAP, but is part of the LCAP. We expanded the aide position to a 28-hour aide and five two-hour a day reading aides for a total of 68 hours a week to support reading. The 5 reading aides practice small leveled group instruction. Through the last round of reading assessments, Blue Oak noted significant growth using this model. Blue Oak is now discussing adding a math aide for additional support.
- Identify students in grades 3-8 to receive math intervention services: Through assessments, Blue Oak identified students in need of math intervention services. In six to eight week blocks, students have received math support in a pull-out model. The Online Assessment Reporting System (OARS) results indicate improvement among the students receiving this support.
- Employ full time math specialist to provide after school tutoring three times per week: Math homework club has been functioning every Monday, Tuesday and Wednesday since September.

Blue Oak Goal No. 2: Support student behavior

- Support student behavior using the Nurtured Heart Approach: Three teachers and one administrator attended the CTI Nurtured Heart Approach training in Arizona. Additionally, Blue Oak sent one administrator and one classified staff to advanced trainer certification at the same time. Blue Oak held an onsite NHA training in March with both parents and community members attending. Teachers are also encouraged to attend local trainings.

David Scott, Assistant Superintendent - Educational Services **Student Support Services**

The Blue Oak School visitation was conducted on Tuesday, April 21st. The school is completing its fourth year of operation as a school chartered by the District. Nathan Rose, Executive Director of Blue Oak School (BOS) and Shannon O’Laughlin, Education Director, provided an overview of the school’s program and services and led a tour of the facility. Instruction was observed in several classrooms during the visitation. There are currently two teachers at every grade level. Mr. Rose and Ms. O’Laughlin reviewed the school’s progress on the 2014-15 LCAP Goals and also provided a brief overview of the plans to build additional classrooms in the existing facility during the summer months.

Student Support Services:

Blue Oak School is currently a school of the District for special education services. The District provides the following services to Blue Oak School:

- 1.5 FTE Resource Specialist Teachers
- 0.2 FTE Speech Therapist (as needed per assessments and IEPs)
- 0.2 FTE School Nurse (one day per week and as needed or called)
- A/N FTE Occupational Therapist (as needed per IEPs)
- 0.3 FTE School Psychologist

Blue Oak students needing more intensive special education services (e.g. Special Day Class, etc.) are offered services in a program provided by the District or the SELPA (Special Education Local Planning Area).

The number of students with Individualized Education Programs (IEPs) enrolled at Blue Oak School in March of 2011 was approximately six students. In May 2014 there were forty-five students at BOS with Individualized Education Programs. As of May 2015 there are forty-six students with IEPs enrolled at BOS. The primary disabilities for these students are in seven of the thirteen Federal disability categories as follows:

Specific Learning Disability	18 students
Other Health Impairment	6 students
Visual Impairment	1 student
Emotional Disability	1 student
Hard of Hearing	1 student
Autism	4 students
Speech or Language Impairment	<u>15 students</u>
Total	46 students

The current student enrollment at BOS is approximately 431 students. The percentage of students with Individual Education Plans (IEPs) at BOS is 10.67 percent. As reported in the December 1, 2014 SELPA Student Report, the percentage of students with IEPs enrolled in CUSD is approximately 13.17, for the SELPA 13.14, and approximately 11.31 percent for the state of California (2013-14 CDE DataQuest Information).

BOS has added a full-time student services coordinator who schedules various academic interventions for students. Additionally, the school has hired a part-time social worker who provides counseling services to students and families.

Mr. Rose reported the school has complied with the state requirements regarding fire, earthquake and safety drills.

Bob Feaster, Assistant Superintendent, Human Resources:
Personnel, Staff Performance

Based on a site visit on April 21st and a meeting with the Director and other staff, Blue Oak School meets the established criteria in this area. They anticipate losing two teachers next school year, both of whom will be moving out of the area.

Jaclyn Kruger, Director, Fiscal Services
Blue Oak Charter School – 2014-15 Financial Review

Blue Oak Charter School (BOCS) is a K-8 charter school located in Chico, California. This is the fourth year of fiscal oversight provided by Chico Unified School District (CUSD) for the BOCS. Butte County Office of Education was the previous authorizing agency.

BOCS has hired a third-party administrator to provide budget/financial services. The third-party administrator is Charter School Management Corporation.

2014-15 Original Budget:

BOCS' Original Budget was adopted by July 1st, which is required by Ed Code. The Original Budget showed a negative change in fund balance of \$15K. The charter school provided a multi-year projection which showed the two future years (15-16 & 16-17) as having positive changes in fund balance.

2013-14 Year End Unaudited Actuals:

The unaudited actuals report was submitted to CUSD by September 15th, which is required by Ed Code. BOCS showed a negative change in fund balance of \$190K. This decrease brought their ending fund balance to \$1,424,557, which equates to a 41% reserve.

2013-14 Audit Report:

BOCS contracted with Matson & Isom to perform an external audit of the 2013-14 financial statements. There were two findings during the audit. The first audit finding dealt with the recording of free/reduced students. Since these students are part of the Local Control Funding Formula calculation, the financial penalty was \$662. The second audit finding dealt with the Common Core Implementation Funds. BOCS did not develop and adopt a plan delineating how the Common Core fund would be spent, and the plan was not explained in a public meeting. On January 13, 2015, BOCS brought forth a spending plan at a public Board meeting and explained how the Common Core Implementation Funds were going to be spent.

2014-15 First Interim Budget:

The first interim budget was approved and submitted to CUSD by December 15th, which is required by Ed Code. In this budget, total revenue increased by \$228K and total expenditures increased by \$212K as compared to Original Budget. Therefore, there is no change in fund balance because the increase in revenues covered the deficit from Original Budget plus the increase in expenditures recorded at First Interim.

2014-15 Second Interim Budget:

The second interim budget was approved by March 15th, which is required by Ed Code. In this budget, total revenues increased by \$9K and total expenditures remained the same as compared to First Interim. Therefore, the positive change in fund balance is now \$9K. BOCS estimates total fund balance at June 30th, 2015 to be \$1,327,737. If this estimate is correct, then the charter school will end the 2014-15 fiscal year with a 37% reserve.

Attendance:

P-2 average daily attendance (ADA) was reported at 401.17 for 2014-15 versus 377.65 reported in 2013-14. The difference is an increase of 23.52 ADA over prior year. The 4-6 grade span had a reduction of 10 ADA between 13-14 and 14-15. The 7-8 grade span had an increase of 30 ADA between 13-14 and 14-15.

Cash Flow:

BOCS has had a positive cash position every month through April 2015. Based on their latest cash flow statement, BCOS is projecting a positive cash balances for both May 2015 and June 2015. While cash is not a large concern right now, it is still important to monitor each month.

CCDS

John Bohannon, Director, Secondary & Alternative Education:

The following are my observations from the visit to Chico Country Day School on April 20, 2015.

Facility complete and charter renewed

| With the completion of the gym complex and playgrounds in January, the last of the CCDS Proposition 1D funded projects are now complete. In just over a year, CCDS has completed the modernization of its entire campus.

The new gym complex includes a full-size basketball court, kitchen, library and music room. The school has two new playgrounds – one for kindergarten and one for 1st-5th grade.

As the construction was coming to an end, the Chico Unified Board of Education renewed the CCDS charter for another five-year term. The CCDS charter now expires in | June of 2020.

Recruitment/Enrollment

Chico Country Day School (CCDS) has been in existence since 1996, providing an educational program for students in grades K-8. The school has grown to be a popular choice for parents and students, with a reported 2014-15 school year enrollment of approximately 566 students.

The demographics of CCDS according to CALPADS show 78.8 percent white students and 9.72 percent Hispanic or Latino. CCDS has 19% of its students on Free and Reduced Lunch with one percent English Learners and 7% students with disabilities.

Governance Structure

Chico Country Day School is governed by a Board of Directors whose members include representatives from parents, community and staff. Matt Juhl-Darlington is the current CCDS Board Chair. He is joined on the board by Charles Thompson, Darien Sterling, Lowell Daun, Susan Efseaff, John Garrett and Jessika Lawrence.

Megan Neely is the Principal of the school and Margaret Reece continues to oversee the business side of the operations as the Chief Business Officer.

Joanne Parsley, Director, Curriculum and Instruction: LCAP Update

The 2014-2015 school year represented the first time that school districts and charter schools developed Local Control Accountability Plans (LCAP) to show how they were utilizing supplementary funds in the new Local Control Funding Formula (LCFF). This change provides a focus for Chico Unified's annual visits and reports. CCDS focused its LCAP funds on three main priorities: 1. Provide improved, supported and equitable conditions of learning for all students; 2. Ensure student outcomes reflect access, equity and achievement in research –based and Common Core aligned instruction strategies and support programs; 3. Continue to improve our supportive and engaging environment where students, staff , and parents feel safe, valued and connected to the community.

The following is an update on CCDS's actions supporting its three main goals:

- Purchased new Common Core math Curriculum (LCAP Priority 2, 4, 7) – CCDS purchased Go Math! for grades K-5 and College Prep Mathematics for grades 6-8. CCDS also purchased supplemental curriculum for spelling and ELA.
- Formed a writing committee to research K-8 writing programs (2, 4, 7) – The writing committee is researching programs and working on K-8 writing alignment. It is also working on the viability of writing portfolios. The committee is comprised of the Director of Curriculum and Instruction and several teachers.
- Provide professional development to staff in regards to Common Core and new math programs (2, 4, 7) – Staff attended a multitude of professional development opportunities in 2014-2015 including: GAFE summits, Nurtured Heart, Common Core workshops, Northern California Writing Project workshops, EnGaged Grant participation, California Kindergarten Conference, CPM and Go Math! in-services, intervention and special education training and conferences and the PBL/High Tech High grant conferences.

- Decrease student referrals, suspension and absenteeism (3, 4, 5, 6 and 8) – CCDS has a strong ADA percentage between 96% and 97%, but many students are chronically absent or tardy. CCDS has worked on communication with parents about absenteeism, truancy and tardies. Student referrals and suspensions have decreased this year and the school credits the PBIS program for this change. The PBIS model was continued with public recognition of students a priority. The school psychologist provides anti-bullying curriculum and conflict resolution for parents and staff.
- Strengthen the Rtl program (1,2,4,5,6,7) – CCDS designated a teacher as the Rtl Coordinator and moved all kindergarten classes to the morning to allow the Kindergarten teachers to work in the intervention program in the afternoon. Ongoing assessment of the Rtl program occurs through AIMSWeb and by utilizing communication with classroom teachers on collaboration days on Tuesday and Fridays. New curriculum for students with Dyslexia has been purchased.
- Increase the use of technology in the classrooms (1,2,4,5,6,7) – CCDS purchased Chromebooks for grades 7-8 and has laptops for grades 3-6. One CCDS teacher is Google Certified and spends 1 hour per day in other classrooms providing professional support to teachers in lower grades or who need support in the implementation of technology in the classrooms. iPads are also used in grades K-2, and resource rooms have laptops and iPads for student support.
- Restructure and strengthen special education program (1,2,4,5,6,7) – A full-time resource teacher serves grades K-5 and a half-time resource teacher serves grades 6-8. Grades 6-8 have an academic support program and the opportunity to take the High School Prep Elective.
- Work on strengthening the CCDS Community (priority 3,4,6) – Volunteer activities are coordinated through the community liaison and highlighted in the newsletter and e-fliers. Parents are thanked and honored. Google Apps are utilized for gaining parent input. The Parent Portal and Student Portal through Aeries were opened and added to the web site. Anti-bullying conflict resolutions evening opportunities have been offered.
- School climate was address with the overall improvement of the facilities and by the addition of a new middle school and elementary campus. The remodels provided adequate space for Rti, special education and kindergarten classrooms.

David Scott, Assistant Superintendent – Educational Services
Student Support Services

Several members of the District’s Charter Review Committee met with Megan Neely, Principal and Margret Reece, Chief Business Officer, on Monday, April 20th. Ms. Neely and Ms. Reece reviewed CCDS’s progress on its LCAP and conducted a tour of the CCDS facilities, including the recently constructed buildings located on West 11th street.

Student Support Services:

Chico Country Day School is a Local Education Agency (LEA) for the purposes of special education services in the Butte County SELPA. In this capacity, the school is responsible for providing or obtaining special education services for all students with disabilities enrolled at the school. CCDS employs resource specialist teachers, intervention teachers, a speech and language therapist, a school psychologist, a school nurse and special education instructional aides to provide services to students through the school’s Response to Intervention model. The school contracts with CUSD and other service providers as needed in order to provide services to students with low incidence disabilities (e.g. visual impairments, etc.).

In May of 2014 there were forty-one students at CCDS with Individualized Education Program (IEPs). As of May 2015 there are forty-five students with IEPs attending CCDS. The primary disabilities for these students are in eight of the thirteen Federal disability categories as follows:

Specific Learning Disability	14 students
Speech or Language Impairment	8 students
Orthopedic Impairment	4 students
Autism	9 students
Other Health Impairment	6 students
Hard of Hearing	2 students
Emotional Disturbance	1 student
Intellectual Disability	<u>1 student</u>
Total	45 students

Additionally, the CCDS staff reported that students without IEPs who need assistance are provided interventions through the school-based speech program and the intervention programs at CCDS.

The student enrollment at CCDS is approximately 564 students. The percentage of students with Individual Education Plans (IEPs) at CCDS is approximately 7.97 percent. As reported in the December 1, 2014 SELPA Student Report, the percentage of students with IEPs in CUSD is approximately 13.17, in the Butte County SELPA 13.14, and approximately 11.31 percent for the state of California (2013-14 DataQuest Information).

Ms. Neely reported that CCDS has complied with the requirements for fire, earthquake and safety drills.

Jaclyn Kruger, Director, Fiscal Services
Chico Country Day School – 2014-2015 Financial Review

Chico Country Day School (CCDS) is a K-8 charter school located in Chico, California. This is the 19th year of fiscal oversight provided by Chico Unified School District (CUSD) for CCDS.

CCDS has its own Chief Business Officer on staff. Her name is Margaret Reece and she has been with CCDS since 2003. She is responsible for preparing the budget and financial reports for the charter school.

2014-15 Original Budget:

CCDS' Original Budget was adopted and submitted to CUSD by July 1st, which is required by Ed Code. The Original Budget showed a negative change in fund balance of approximately \$468K. The charter school also provided a multi-year projection which showed the two future years (15-16 & 16-17) as having positive changes in fund balance with reserves continuing to grow.

2013-14 Year End Unaudited Actuals:

The unaudited actuals report was submitted to CUSD by September 15th, which is required by Ed Code. CCDS showed a positive change in fund balance of approximately \$48K, after taking into account state money received for facilities. This increase brought their ending fund balance to \$3,092,746, which equates to a 70% reserve.

2013-14 Audit Report:

CCDS contracted with Stephen Roatch Accountancy Corporation to perform an external audit of the 2013-14 financial statements. There was one finding during the audit. The audit finding dealt with the recording of free/reduced students. Since these students are part of the Local Control Funding Formula calculation, the financial penalty was \$3,090.

2014-15 First Interim Budget:

The first interim budget was approved and submitted to CUSD by December 15th, which is required by Ed Code. In this budget, total revenue increased by \$346K and total expenditures decreased by \$387K as compared to Original Budget. Therefore, the positive change in fund balance is now \$265K.

2014-15 Second Interim Budget:

The second interim budget was approved by March 15th, which is required by Ed Code. In this budget, total revenues decreased \$99K and total expenditures increased by \$50K as compared to First Interim. Therefore, the positive change in fund balance is now \$116K. CCDS estimates total fund balance at June 30th, 2015 to be \$6,362,134. Of this ending fund balance, \$3,677,242 has been dedicated for facilities. If this estimate is correct and the facilities dedication is taken into account, then the charter school will end the 2014-15 fiscal year with almost a 60% reserve.

Attendance:

P-2 average daily attendance (ADA) was reported at 542.38 for 2014-15 versus 533.60 reported in 2013-14. This difference is an increase of 8.78 ADA of prior year.

Cash Flow:

As of May 31st, 2015, CCDS had a strong cash position. The projection for June also shows a positive cash balance. CCDS has a large reserve, which helps with cash flow. Even though cash isn't a large concern right now, it is still important to monitor cash monthly.

FOREST RANCH**John Bohannon, Director, Secondary & Alternative Education:**

The following are my observations from the visit to Forest Ranch Charter School on April 28, 2015.

Recruitment/Enrollment

Forest Ranch continues to work on maintaining and growing its enrollment. They have targeted the 2015-2016 school year to implement a full 7th and 8th grade program to become a K-8 school. The transition started small with about four 7th grade students in a 6/7 combination class in 2014-2015. Forest Ranch had an enrollment of 124 students in 2013-2014 and 135 in 2014-2015. The projection for 2015-2016 is 151 students.

Governance Structure

Forest Ranch has a veteran Board with members that possess expertise in many areas, including school finance. The current FRCS Board Chair is Dave Foreman. He is joined on the board by Kiersten Morgan, Maureen Blawat, Liz Thomas, Lynne Wright, LaDawn Hall, Chantel Walker, Janina Carter and Theresa Palmarini.

There is a clear separation of duties between the Board and day-to-day operations with Director Christia Marasco handling the day-to-day operations.

Lisa Speegle is the school's Chief Business Officer.

Joanne Parsley, Director, Curriculum and Instruction:**LCAP Update**

The 2014-2015 school year represented the first time that school districts and charter schools developed Local Control Accountability Plans (LCAP) to show how they were utilizing supplementary funds in the new Local Control Funding Formula (LCFF). This change provides a focus for Chico Unified's annual visits and reports. The following is an update on the actions identified in Forest Ranch Charter School's LCAP plan.

Forest Ranch Goal No. 1: Increase overall student achievement in core academic areas

- Increase classroom bandwidth to ensure online learning and testing available: Over the summer Forest Ranch increased bandwidth to 6 MBps. This is an improvement, but still not meeting the full technology needs of the school. Through a K-12 High Speed Network Grant, Forest Ranch will get an upgrade to fiber optic cabling, which should increase the bandwidth to 100MBps.
- Design and implement Common Core State Standard aligned assessments, kid-friendly standards, curriculum, and report cards: Summer work included building new assessments and modifying existing assessments to better align to CCSS. The school continues to utilize Scantron Ed Performance as well as a combination of BPST, DIBELS, locally created Kindergarten benchmarks, i-Ready and Reading A-Z. CPM unit assessments are utilized in 6th and 7th grade.
- In September, 3-5 grade student-friendly standards for ELA and math were completed, which gives the school student-friendly standards in ELA and Math at all grade levels.
- CCSS report cards were utilized this year. Report cards will continue to be modified as needed.
- Teachers in all grade levels have worked hard to develop new CCSS lesson plans. A teacher was hired over the summer to further develop Common Core math support materials. The 6th/7th grade teacher attended a week-long training for the new CPM materials. Forest Ranch also hired a teacher over the summer to align lab kits with the Next Generation Science Standards. The 5th-7th grade teachers have Houghton Mifflin new Common Core teaching materials and all teachers attended in-house training and discussion surrounding the development of Common Core in ELA.
- Establish baseline results on SBAC and Scantron Ed Performance Series (in progress): Students in grades 3-7 participated in Scantron Ed Performance testing twice this school year (September baseline testing and February mid-year testing). Students will participate in SBAC testing in early May and end-of-the-year Scantron testing in late May. Next year Scantron testing will happen in the beginning of the year and in March.
- Increase parent education opportunities and establish baseline for attendance (In progress): At the beginning of the year, five parent education opportunities were established (back to school night, positive behavior support, Common Core and new SBAC testing, Social Media and Open House).
- Develop an effective Response-to-Intervention program and Improve after school Homework Club (in progress): Time was increased for the intervention coordinator and intervention aide positions. An initial team meeting was held to coordinate resource and site-based intervention push-in and pull-out schedules

and services. The team meets weekly to review participating students and adapt materials and staffing utilized for students. A stipend was authorized for a teacher in charge of the Homework Club.

Increase ADA at P-2 to 95.30; increase attendance through increased parent education and student rewards (not meeting)

- Three students missed extended time making it difficult to make this goal in the small school environment. School is providing regular education about the benefits of school attendance in its newsletters and assemblies. The school is offering individual and class rewards for attendance.
- Implement a parent portal for ease of access to grades and missing assignments (not implemented). School implemented SchoolWise but has not activated the parent portal yet.
- Another part of the attendance goal for Forest Ranch in 2015-2016 is to decrease chronic absences.

Forest Ranch Goal No. 2: Increase efficiency and effectiveness of campus-wide positive behavior support program to provide a safe, caring environment for all learners

- Establish baseline in referral and incident tracking system, Lifeskill grading system, faculty/staff PBS implementation and family survey results (In progress): Over the summer a new tracking system was developed which included operational definitions of behaviors, new referral forms and a process for entering and tracking referrals collected. All staff members were trained during the summer in operational definitions and use of referral slips. Referrals have been logged into the computer monthly and baseline data is being accumulated. Baseline data on Lifeskill scores will be reported at the end of the year. Faculty and staff were trained in modifications to school wide PBS program during summer staff development.
- Reduce suspension rate to less than 3% (in progress): suspension numbers were lower through site visit.

David Scott, Assistant Superintendent– Educational Services **Student Support Services**

The Forest Ranch Charter School visitation was conducted on Tuesday, April 28th. Christia Marasco, Director of Forest Ranch Charter School (FRCS), provided an update of the activities and program improvements since the previous visit in March of 2014. Ms. Marasco also provided an overview of the FRCS 2014-15 LCAP. The visitation team visited several of the classrooms on campus.

Student Support Services:

Forest Ranch Charter School (FRCS) is presently a school of the District for special education services. The District provides the following services to FRCS:

- 0.50 FTE Resource Specialist Teacher
- 0.20 FTE Speech Therapist (approximately 1 day per week)
- A/N FTE School Nurse (as needed or called)
- A/N FTE Occupational Therapist (as needed per IEPs)
- 0.10 FTE School Psychologist (approximately 4 hours per week)

FRCS students needing more intensive special education services (e.g. Special Day Class, etc.) are offered services in other programs available through the District or the SELPA.

In April 2014 there were fifteen students at FRCS with IEPs. As of May 2015 there are thirteen students with IEPs (1 pending). The primary disabilities for these students are in four of the thirteen Federal disability categories as follows:

Intellectual Disability	1 student
Specific Learning Disability	4 students
Other Health Impairment	3 students
Speech or Language Impairment	<u>5 students</u>
Total	13 students

The student enrollment at FRCS is approximately 150 students. The percentage of students with Individual Education Plans (IEPs) at FRCS is 8.66 percent. As reported in the December 1, 2014 SELPA Student Report, the percentage of students with IEPs in CUSD is approximately 13.17, in the Butte County SELPA 13.14, and approximately 11.31 percent for the state of California (2013-14 DataQuest Information).

Ms. Marasco and the FRCS staff continue to work on many aspects of the school program, including professional development in the areas of Science, Technology, Engineering and Math (STEM), Engaged New York Math and College Preparatory Math.

Ms. Marasco reported that FRCS had complied with the requirements for fire, earthquake and safety drills.

Ms. Marasco and the FRCS staff continue to implement highly effective teaching methods to provide a program designed to provide a stimulating environment combined with high academic standards.

Jaclyn Kruger Director, Fiscal Services

Forest Ranch Charter School – 2014-2015 Financial Review

Forest Ranch Charter School (FRCS) is a K-8 charter school located in Forest Ranch, California, which is currently running a K-7 program. This is the 7th year of fiscal oversight provided by Chico Unified School District (CUSD) for FRCS.

FRCS has its own Chief Business Officer on staff. She prepares the budget and financial reports for the charter school.

2014-15 Original Budget:

FRCS' Original Budget was adopted and submitted to CUSD by July 1st, which is required by Ed Code. The Original Budget showed a positive change in fund balance of \$7K. The charter school provided a multi-year projection which showed the two future years (15-16 & 16-17) as having positive change in fund balance with reserves continuing to grow.

2013-14 Year End Unaudited Actuals:

The unaudited actuals report was approved and submitted by September 15th, which is required by Ed Code. FRCS showed a positive change in fund balance of \$98K. This increase brought their ending fund balance to \$747,527, which equates to a 56% reserve.

2013-14 Audit Report:

FRCS contracted with Matson & Isom to perform an external audit of the 2013-14 financial statements. There were no findings during the audit.

2014-15 First Interim Budget:

The first interim budget was approved and submitted to CUSD by December 15th, which is required by Ed Code. In this budget, total revenue decreased by \$26K and total expenditures decreased by \$14K as compared to Original Budget. Therefore, there is now a negative change in fund balance of \$5K.

2014-15 Second Interim Budget:

The second interim budget was received by March 15th, which is required by Ed Code. In this budget, total revenues decreased by \$4K and total expenditures increased by \$6K as compared to First Interim. Therefore, the negative change in fund balance is now \$15K. FRCS estimates total fund balance at June 30th, 2015 to be \$732,508. If this estimate is correct, then the charter school will end the 2014-15 fiscal year with a 61% reserve.

Attendance:

P-2 average daily attendance (ADA) was reported at 125.69 for 2014-15 versus 117.74 reported in 2013-14. This difference is an increase of 7.95 ADA over prior year.

Cash Flow:

FRCS has maintained a strong cash position all year. They have submitted several cash flow projections throughout the year to CUSD. While cash is not a large concern right now, it is still important to monitor each month.

INSPIRE

John Bohannon, Director, Secondary & Alternative Education:

The following are my observations from the visit to Inspire School of Arts and Science on April 30, 2015.

Recruitment/Enrollment

Inspire's growth flattened in 2014/2015. End of the year numbers show 407 students enrolled compared to 408 students in 2013/2014. Inspire continues to draw students from outside the district at around 20 percent.

Governance Structure

The board for Inspire has a unique structure because of its classification as an "internal charter" of CUSD. What makes Inspire different is the CUSD Board of Education has the authority to appoint one board member to Inspire's board.

CUSD's representative to the Inspire Board in 2014/2015 is Eileen Robinson. Ms. Robinson also serves on the CUSD Board of Education.

Dale Word, an Engineering Professor at CSU, Chico, is the current President of the Inspire board. Matt Brown serves as the Vice-President of the board. The remaining members of the board are: Samia Yaqub (Butte College representative), Debbie Travers (teacher representative) Robinson, Sue Hargrave-Benson (CSU, Chico Performing Arts, Retired) and Julia Shea (parent representative and business community representative).

As an "internal" charter, Inspire receives administrative support in the areas of finance, maintenance, technology and pupil support per an MOU with the district. Inspire Eric Nilsson, the founding Principal of Inspire retires in June 2015. Jerry Lynn Crosby, a Chico native and current Principal in the Elk Grove area, has been named the new Principal. Assistant Principal Dan La Bar will team with Crosby to handle the day-to-day operations of the school.

Awards

State Superintendent of Schools Tom Torlakson announced the recipients of the 2015 California Gold Ribbon Schools in May, and Inspire received the Gold Ribbon Award and the Arts Exemplary Education Award.

This award followed a visit by a member of the California Department of Education in April. Inspire was recognized as a distinguished arts school by the Art Schools Network,

a national organization of over 350 K12 arts schools. US News and World Report included Inspire as a silver medalist on their national list of high achieving schools.

**Joanne Parsley, Director, Curriculum and Instruction:
LCAP Update**

The 2014-2015 school year represented the first time that school districts and charter schools developed Local Control Accountability Plans (LCAP) to show how they were utilizing supplementary funds in the new Local Control Funding Formula (LCFF). This change provides a focus for Chico Unified's annual visits and reports. The following is an update on the actions identified in Inspire's LCAP plan.

Develop a Career Technical Education master plan/Determine which majors will best apply as a CTE pathway: Inspire has components consistent with CTE pathways with its Project Lead The Way engineering curriculum. In addition, Inspire has elements of CTE courses in areas like technical theatre in visual and performing arts. Inspire has been formalizing a relationship with Butte College and industry advisory groups to further this goal. There is also the goal of adding a capstone course for PTLW and a relationship developing with the Society for Women Engineers at Chico State. An area to work on for Inspire is developing strategies to get teachers industry experience to allow them to qualify for a CTE credential to be part of CTE pathways.

Hire English and math intervention coordinator: Inspire has a teacher on campus assigned to coordinate intervention. Inspire stated that this is an area of growth for the school. While they have programs in place for both English and math, the approach did not become systemic this year. There is a plan in place for counselors to organize support for students in the interventions based on level of need which focuses on students with support needs in multiple classes. Data clearly indicates a need for Inspire to improve in math and a math intervention teacher was hired for the 2014-2015 school year. The school is currently working on strategies to improve the intervention program for 2015-2016.

**David Scott, Assistant Superintendent– Educational Services
Student Support Services**

The District Charter Review Committee visited Inspire School of the Arts and Sciences on Thursday, April 30th, 2015. The school is in its fifth year of operation. Eric Nilsson, Principal of Inspire School of the Arts and Sciences, and Dan La Bar, Inspire's Assistant Principal provided an overview of the school's program and progress to date.

Student Support Services:

Inspire School of the Arts and Sciences is currently a school of the District for special education services. The District provides the following services to Inspire:

- 1.5 FTE Resource Specialist Teachers

- A/N FTE Speech Therapist (as needed per assessments and IEPs)
- A/N FTE School Nurse (as needed or called)
- 0.20 FTE School Psychologist (1 day per week and as needed)

Inspire students needing more intensive special education services (e.g. Special Day Class, etc.) are offered services in other programs available through the District or the SELPA.

In March of 2012 there were twenty-one students at Inspire with Individualized Education Programs (IEPs). As of April 2015 there are thirty-five students at Inspire with Individualized Education Programs. The primary disabilities for these students are in six of the thirteen Federal disability categories as follows:

Specific Learning Disability	11 students
Autism	5 students
Speech and Language Impairment	1 student
Emotional Disturbance	4 students
Hard of Hearing	1 student
Other Health Impairment	<u>13 students</u>
Total	35 students

The Inspire staff reported that students without IEPs who need assistance are provided interventions/support through the lunch and study hall intervention programs.

Two members of the Inspire faculty facilitated the EngagED professional development process this year. The EngagED activities facilitate collaborative learning by teachers regarding instructional strategies, academic rigor and student learning. The EngagED program is open to teachers throughout a multi-county region in Northern California.

The current student enrollment at Inspire is approximately 409 students. The percentage of students with Individual Education Plans (IEPs) at Inspire is 8.56 percent. As reported in the December 1, 2014 SELPA Student Report, the percentage of students with IEPs in the District is approximately 13.17, in the SELPA 13.14, and approximately 11.31 percent for the state of California (2013-14 DataQuest Information).

In previous years, the District has provided 1.2 FTE School Counselors to Inspire to support students with academic, educational and personal/social concerns. As set forth in a revised MOU between the District and Inspire, the school will select and employ its own school counselors commencing with the 2015-16 school year.

Mr. Nilsson reported the school has complied with state requirements regarding fire, earthquake and safety drills.

Bob Feaster, Assistant Superintendent, Human Resources:
Personnel, Staff Performance

Based on an onsite visit that was conducted on April 30, 2015 and an interview with administrators, there do not appear to be any areas of concern with respect to Human Resource issues. The teaching staff is relatively consistent. The school will move to hire their own counseling staff (2, .7 FTE positions). Through the current school year (2014/15) the school used counseling staff provided by CUSD. The site is currently completing the process of hiring a new principal. This is a very important and significant change for the school as the current principal has been with the school since its inception. The school has identified a need for additional and focused professional development for the teaching staff.

Jaclyn Kruger, Director, Fiscal Services
Inspire School of Arts and Science – 2014-2015 Financial Review

Inspire School of Arts & Sciences (Inspire) is a 9-12 charter school located in Chico, California. Inspire is a locally and indirectly funded charter school sponsored by Chico Unified School District (CUSD). While Inspire is not an independent 501(c)(3) organization, it does have its own Board and works cooperatively with CUSD on matters such as facilities, educational program, and fiscal services.

Inspire is a locally funded charter school and, as a result, its financial accounting is managed and reported by CUSD. ISAS has its own fund (fund 09) within the financial statements, so its operations can be completely separate from CUSD's general fund.

2014-15 Original Budget:

Inspire's Original Budget was adopted by the Inspire Board and CUSD Board by July 1st, which is required by Ed Code. The Original Budget showed a negative change in fund balance of \$303K. Of this deficit, \$102K is related to restricted programs spending down carryover from the prior year.

2013-14 Year End Unaudited Actuals:

Inspire's financial information is incorporated into the CUSD financial statements. Inspire showed a positive change in fund balance of \$54K. This increase brought their ending fund balance to \$1 million, which equates to a 28% reserve.

2013-14 Audit Report:

Inspire is part of CUSD's annual external audit. Matson & Isom was used as the independent external audit firm to audit the 2013-14 financial statements. There was one finding for Inspire. This audit finding dealt with the recording of free/reduced students. Since these students are part of the Local Control Funding Formula calculation, the financial penalty was \$961.

2014-15 First Interim Budget:

The first interim budget was approved by the Inspire Board by December 15th, which is required by Ed Code. In this budget, total revenue increased by \$111K and total

expenditures increased by \$85K as compared to Original Budget. Therefore, there is now a negative change in fund balance of \$278K.

2014-15 Second Interim Budget:

The second interim budget was approved by the Inspire Board by March 15th, which is required by Ed Code. In this budget, total revenues decreased by \$40K and total expenditures decreased by \$14K as compared to First Interim. Therefore, the negative change in fund balance is now \$304K. Inspire estimates total fund balance at June 30th, 2015 to be \$696,195. If this estimate is correct, then the charter school will end the 2014-15 fiscal year with an 18% reserve.

Attendance:

P-2 average daily attendance (ADA) was reported at 408.14 for 2014-15 versus 399.51 reported in 2013-14. This difference is an increase of 8.63 ADA over prior year.

Cash Flow:

Cash flow statements provide a tool for both the charter school administration and CUSD to review actual receipts and expenditures as well as the projected in-flow and out-flow of cash in the future months. Currently, Inspire does not submit monthly cash flow statements. While cash is not a large concern right now, it should still be monitored monthly. CUSD will work with Inspire to generate cash flow projections during 2015-16.

NORD

John Bohannon, Director, Secondary & Alternative Education:

The following are my observations from the visit to Nord Country School on April 14, 2015.

Recruitment/Enrollment:

Nord Country School was founded as a charter school in 2005, when the former CUSD school was closed due to low enrollment. Since reopening as a charter, the Nord community has embraced the school and has continued to practice an ongoing and successful recruitment campaign. There were 135 enrolled for the 2012-13 school year. The number of students grew to 149 in 2013-2014. The 2014-2015 school year showed a student enrollment of 142 at the time of the site visit. The Hispanic/Latino population is 21% of the population, and the numbers of English Language Learners has continued to shrink. Nord had 13% ELL students in 2012-2013, 10% in 13-14 and only 8 percent. 2014-2015.

The CUSD Board of Education approved a 5-year renewal for Nord on Dec. 7, 2011. On September 17, 2014 the CUSD Board of Education approved a material revision to the charter allowing Nord Country School to add 7th and 8th grade. The 7th grade program is

scheduled to begin in 2015-2016, which helps account for the projected enrollment of 162 students.

Governance Structure:

Nord Country School is governed by a Board of Directors whose members include representatives from parents, community and staff. The strength of the Nord community is reflected in the Board composition, as many members are extremely active in Nord's school functions. The community is extremely supportive of the Annual Pie Auction, which provides the school with additional funds. Richard Aguilera is the current Nord School Board President. The remaining members of the board are: Lexie Aceves, Janet Ellner, Kristy Dailey, Kelli Ruley, Roy Roney and Tom Williams.

Day to day responsibility for both academic and business issues is assumed by Principal/Executive Director Kathy Dahlgren.

Joanne Parsley, Director, Curriculum & Instruction: LCAP Update

The 2014-2015 school year represented the first time that school districts and charter schools developed Local Control Accountability Plans (LCAP) to show how they were utilizing supplementary funds in the new Local Control Funding Formula (LCFF). This change provides a focus for Chico Unified's annual visits and reports. The following is an update on the actions identified in Nord's LCAP plan.

Nord Goal No. 1: NCS will align all instruction and student learning to the Common Core State Standards for ELA, Math and Literacy in the Content Areas

- Nord will purchase new Common Core Math Curriculum – Purchased 1st-5th grade curriculum titled Bridges (1 day of training was completed in August). College Prep Mathematics was purchased for 6th grade and will be added for 7th and 8th grade when those grade levels are added at Nord.
- Nord will provide training for all teachers in Common Core strategies for both math and language arts – Trainings included Thinking Maps, Common Core Math training, Developing Artistic Literacy, California Kindergarten Conference and NGSS training.
- Nord will increase the amount of non-fiction reading material – 6th grade is utilizing Time for Kids weekly and 1st through 5th grade is utilizing National Geographic magazine. Additional nonfiction books have been purchased for teacher's classroom libraries and the school library.

Nord Goal No. 2: All students will use technology to access Common Core aligned curriculum on a regular basis.

- Nord will increase bandwidth by installing an additional T1 line – T1 added in July. Through a K-12 High Speed Network Grant, Nord will be getting fiber optic cabling brought to the school which will increase bandwidth. A small iPad lab was purchased for centers use for teachers.

Nord Goal No. 3: NCS will increase the number of students scoring proficient on the CAASPP English Language Arts and math tests as established in 2014-2015.

- Nord will continue Universal Screening to monitor student progress. Dibels testing will continue. The scores assessments will be completed in August, and March and scores will be compared
- School assessments will be analyzed – Growth on iready math and language arts assessments will be analyzed at the end of the year.

Nord Goal No. 4: NCS will provide a positive climate that supports the academic, emotional and physical needs of all students through Positive Behavior Intervention Supports (PBIS)

- Nord will review Tier I supports for students. PBIS team met to define major and minor referral categories, review and update referral form, create a consequence sequence and talk about implementing character trait education. Second step curriculum was purchased and is being used in all classrooms.
- Staff development will be provided for Tier II and Tier III supports. Staff development has included: Powerful Intervention Strategies to help you successfully manage students struggling with behavior issues, Complimentary Interventions for Autism, Asperger's, Sensory and ADHD children, Functional Behavior Assessments and Behavior Intervention Plans, Identifying Anxiety Disorders, Oppositional, Defiant and Disruptive Children, LiPS and Orton Gillingham.
- Nord will reduce the number of "major" referrals by 1%. First semester "major" referrals were down 47% during the first trimester and up 1% in the second trimester.

Goals specific to Low Income students

- Nord will purchase a school-wide universal screening tool and receive staff development in its use. Nord purchased i-Ready and has completed the first math and language arts assessment of the year. This system will test 1st-6th grades in math and language arts two times per year
- Nord will hire an intervention coordinator to help support and monitor student progress in intervention groups. Nord hired an intervention coordinator in August. She has additional time to help coordinate all of the groups and to help monitor the progress students are making. She also coordinates SST requests
- Nord will offer Summer School.
- Nord will purchase a new student information system – School Wise.

David Scott, Assistant Superintendent - Educational Services:

The Chico Unified School District Charter Review Committee met at Nord Country School (NCS) on April 1, 2014. Kathleen Dahlgren, Principal, Nord Country School, Board Members and staff members met with the Committee. During the brief visit, instruction was observed in several classrooms.

Student Support Services:

Nord Country School is a Local Education Agency (LEA) for the purposes of special education services in the Butte County SELPA. In this capacity, the school is responsible for providing or obtaining special education services for all students with disabilities enrolled at the school. Nord Country School contracts with the Chico Country Day School for school psychology services needed by its students.

In May 2014 there were thirteen students at NCS with Individualized Education Programs. As of May 2015 there are seventeen students with IEPs enrolled at NCS. The primary disabilities for these students are in five of the thirteen Federal disability categories as follows:

Specific Learning Disability	5 students
Orthopedic Impairment	1 student
Speech or Language Impairment	3 students
Other Health Impaired	6 students
Autism	<u>2 students</u>
Total	17 students

The NCS staff reported that students without IEPs who need academic assistance are provided additional interventions during the school day and in the after school program. The student enrollment at NCS is approximately 140 students. The percentage of students with Individual Education Plans (IEPs) at NCS is 12.14%. As reported in the December 1, 2014 SELPA Student Report, the percentage of students with IEPs in CUSD is approximately 13.17, in the SELPA 13.14, and approximately 11.31 percent in the state of California (2013-14 DataQuest Information).

Ms. Dahlgren reported the school is implementing several programs including College Preparatory Math, iReady assessments, various intervention programs for students with academic needs (e.g. LIPPs, SIPPS, Reading Recovery, etc.) and English language development. The school plans to hire a part-time Language Arts teacher for the 2015-16 school year in order to strengthen its program for struggling students.

Ms. Dahlgren reported Nord has complied with state requirements regarding fire, earthquake and safety drills.

Bob Feaster, Assistant Superintendent, Human Resources:

Personnel, Staff Performance

Based on a site visit that was conducted on April 14, 2015, a meeting with Nord Country School (NCS) leadership and a review of records, the school appears to meet all of the criteria in this area. The school noted that they have many instructional aides who hold teaching credentials. They recently hired a full time 7th grade teacher for next school year. They also hired an Intervention Coordinator at .1 FTE. They noted that they've had no teacher turn over this year but anticipate some disruption next year with 4 teachers who are pregnant. They lost one instructional aide this year who left for a teaching position elsewhere.

Jaclyn Kruger, Director, Fiscal Services **Nord Country School – 2014-2015 Financial Review**

Nord Country School (NCS) is now a K-8 charter school located in Chico, California. They are currently running a K-6 program. This is the 10th year of fiscal oversight provided by Chico Unified School District (CUSD) for NCS.

NCS contracts with Forest Ranch Charter School for its financial services.

2014-15 Original Budget:

NCS' Original Budget was adopted by July 1st, which is required by Ed Code. The Original Budget showed a positive change in fund balance of \$2K. The charter school also provided a multi-year projection which showed the two future years (15-16 & 16-17) as having positive changes in fund balance.

2013-14 Year End Unaudited Actuals:

The unaudited actuals report was submitted by September 15th, which is required by Ed Code. NCS showed a positive change in fund balance of \$131K. This increase brought their ending fund balance to \$1,220,580, which equates to a 73% reserve.

2013-14 Audit Report:

NCS contracted with Matson & Isom to perform an external audit of the 2013-14 financial statements. There were no findings during the audit.

2014-15 First Interim Budget:

The first interim budget was approved and submitted to CUSD by December 15th, which is required by Ed Code. At this budget, total revenue decreased by \$19K and total expenditures increased by \$8K. Therefore, the negative change in fund balance is now \$25K.

2014-15 Second Interim Budget:

The second interim budget was submitted by March 15th, which is required by Ed Code. In this budget, total revenues increased by \$50K and total expenditures increased by \$8K. Therefore, the positive change in fund balance is now \$17K. NCS estimates total

fund balance at June 30th, 2015 to be \$1,238,018. If this estimate is correct, then the charter school will end the 2014-15 fiscal year with a 95% reserve.

Attendance:

P-2 average daily attendance (ADA) was reported at 135.07 for 2014-15 versus 141.59 reported in 2013-14. This difference shows a decrease of 6.52 ADA.

Cash Flow:

NCS has submitted monthly cash flow statements. As of March 31st, 2015, NCS has a strong positive cash position. While cash is not a large concern right now, it is still important to monitor each month.

SHERWOOD

John Bohannon, Director, Secondary & Alternative Education:

The following are my observations from the visit to Sherwood Montessori on May 5, 2015.

Recruitment/Enrollment

Sherwood's enrollment was 145 students in 2014-2015. The school projects a total of 164 students for 2015-2016

Governance Structure

Chris Fosen is the current board chair for Sherwood. Other board members are David Kuperman, Joe Wilson, Kristy Cowell, Russell Shapiro, Mark Reiser and Peter DiFalco. Michelle Yezbick is the school's Director.

Facility

At its May board meeting, the Sherwood board voted to extend its lease at 746 Moss Avenue until June 30, 2016. In addition, the school was exploring options for a different facility in the future.

Joanne Parsley, Director, Curriculum and Instruction:

LCAP Update

The 2014-2015 school year represented the first time that school districts and charter schools developed Local Control Accountability Plans (LCAP) to show how they were utilizing supplementary funds in the new Local Control Funding Formula (LCFF). This change provides a focus for Chico Unified's annual visits and reports. The following is an update on the actions identified in Sherwood's LCAP plan.

Provide professional development on CCSS and the Montessori Method: Sherwood provided two days of staff development before the start of the 2014-2015 school year. During this plan, the Montessori Great Lessons were discussed as a scaffold to the Common Core standards. In addition, Sherwood contracted with a veteran Montessori teacher to mentor its staff on the Montessori methods throughout the school year. Retain qualified SBIT coordinator to work collaboratively with director, teachers and parents/collect data to determine which students need access to the SBIT process: Sherwood did hire a SBIT coordinator and part-time assistant. In addition, a part-time math intervention teacher was hired and Director Michelle Yezbick facilitated reading intervention. According to Yezbick, 72 students qualified for SBIT either for behavior, academics or both. Some students received short-term intervention and some have needs that have required longer interventions. The math intervention teacher has worked on the math curriculum and also works with students for pre-teaching and re-teaching at the request of teachers. Data is collected on reading levels and twice-yearly writing assessments. The writing assessments will be updated to match the Common Core writing rubrics. Implement conferences with parents of chronically absent parents: Sherwood instituted a system of truancy letters and follow up meetings with Director Michelle Yezbick. Yezbick reported that Sherwood has enjoyed strong attendance this year.

David Scott, Assistant Superintendent - Educational Services
Student Support Services

The Sherwood Montessori School visitation was conducted on Thursday, May 5th. The school is in its fifth year of operation. Michelle Yezbick, Director of Sherwood Montessori School (SMS), provided an overview of the school's program and services. Instruction was observed in several classrooms during the visitation.

Student Support Services:

Sherwood Montessori School (SMS) is presently a school of the District for special education services. The District provides the following services to the school:

- 0.50 FTE Resource Specialist Teacher
- A/N FTE Speech Therapist (as needed per assessments and IEPs)
- A/N FTE School Nurse (as needed or called)
- A/N FTE Occupational Therapist (as needed per IEPs)
- 0.10 FTE School Psychologist (approximately 12 hours per month)

SMS students needing more intensive special education services (e.g. Special Day Class, etc.) are offered services in other programs available through the District or SELPA.

In March 2014, there were twenty-one students at the school with Individualized Education Programs. As of May 2015, there are eleven students with IEPs enrolled at Sherwood, a significant decrease from the previous year. The primary disabilities for these students are in four of the thirteen Federal disability categories as follows:

Autism	1 student
Specific Learning Disability	3 students
Other Health Impairment	4 students
Speech or Language Impairment	<u>3 students</u>
Total	11 students

The current student enrollment at SMS is approximately 140 students. The percentage of students with Individual Education Plans (IEPs) at SMS is 7.85 percent. As reported in the December 1, 2014 SELPA Student Report, the percentage of students with IEPs in the District is approximately 13.17, in the SELPA 13.14, and approximately 11.31 percent for the state of California (2013-14 DataQuest Information).

Ms. Yezbick reported the school community continues to work on improving the school's intervention programs, services and supports for students needing additional support.

Ms. Yezbick reported the school has complied with state requirements regarding fire, earthquake and safety drills.

**Bob Feaster, Assistant Superintendent, Human Resources:
Personnel, Staff Performance**

Based on a site visit that was conducted on May 5, 2015, along with a review of records, and an interview with the Director, Sherwood Montessori School meets the established criteria in this area. They recently added an instructional aide who provides behavior support. They added a part time Montessori mentor and are recruiting for a full-time teacher for 2015-2016.

**Jaclyn Kruger, Director, Fiscal Services
Sherwood Montessori Charter School – 2014-2015 Financial Review**

Sherwood Montessori Charter School (SMCS) is a K-8 charter school located in Chico, California. This is the 5th year of fiscal oversight provided by Chico Unified School District (CUSD) for SMCS.

Beginning in 2014-15, SMCS hired an employee to complete the budget/financial aspects of running a charter school. His name is Pat Casey.

2014-15 Original Budget:

SMCS' Original Budget was adopted and submitted by July 1st, which is required by Ed Code. The Original Budget showed a negative change in fund balance of \$34K. The charter school also provided a multi-year projection which showed the two future years

(15-16 & 16-17) as having positive change in fund balance with reserves continuing to grow.

2013-14 Year End Unaudited Actuals:

The unaudited actuals report was approved by September 15th, which is required by Ed Code. SMCS showed a positive change in fund balance of \$117K. This increase brought their ending fund balance to \$260,449, which equates to a 19% reserve.

2013-14 Audit Report:

SMCS contracted with Matson & Isom to perform an external audit of the 2013-14 financial statements. There was one finding during the audit. The audit finding dealt with the recording of free/reduced students. Since these students are part of the Local Control Funding Formula calculation, the financial penalty was \$508.

2014-15 First Interim Budget:

The first interim budget was approved and submitted to CUSD by December 15th, which is required by Ed Code. In this budget, total revenue decreased by \$247K and total expenditures decreased by \$102K as compared to Original Budget. Therefore, there is now a negative change in fund balance of \$179K.

2014-15 Second Interim Budget:

The second interim budget was submitted by March 15th, which is required by Ed Code. In this budget, total revenue increased by \$51K and total expenditures decreased by \$18K as compared to First Interim. Therefore, the negative change in fund balance is now \$110K. SMCS estimates total fund balance at June 30th, 2015 to be \$150,157. If this estimate is correct, then the charter school will end the 2014-15 fiscal year with an 8.8% reserve.

Attendance:

P-2 average daily attendance (ADA) was reported at 137.64 for 2014-15 versus 159.33 reported in 2013-14. This difference shows a decrease of 21.69 ADA. Six of the ADA was attributable to the K-3 grade span and another 16 ADA was attributable to the 7-8 grade span. SMCS' ADA in the last two years has fluctuated significantly. This is largely due to the student population in grades 7 and 8. Since charter schools are paid on their current year ADA, it is important for SMCS to continually monitor ADA by grade each month.

Cash Flow:

Cash flow statements provide a tool for both the charter school administration and CUSD to review actual receipts and expenditures as well as the projected in-flow and out-flow of cash in the future months. SMCS had positive cash positions each month for July through April. SMCS is also projecting positive cash for May 2015 and June 2015. Given the fluctuation in ADA, it is very important for SMCS to continue to monitor cash monthly.

WILDFLOWER

John Bohannon, Director, Secondary & Alternative Education:

The following are my observations from the visit to Wildflower Open Classroom on May 6, 2015.

Recruitment/Enrollment

Wildflower just completed its fourth year and third in the facility that previously was home to Chico Country Day School, Academy for Change and Chico Green at 2414 Cohasset Road. The school finished the school year with 130 students. The school shows a projection of 145 to 150 students for the 2015-2016 school year. The school had no English Learners.

Governance Structure

Jonas Herzog was one of the founders of the school and is the Board Chair. Tom Hicks is the school's Director. Other members of the Wildflower board are Christina Cassady, Tom Lando, Jillian Hopewell and Talia Scherquist.

Joanne Parsley, Director, Curriculum and Instruction: LCAP Update

The 2014-2015 school year represented the first time that school districts and charter schools developed Local Control Accountability Plans (LCAP) to show how they were utilizing supplementary funds in the new Local Control Funding Formula (LCFF). This change provides a focus for Chico Unified's annual visits and reports. The following is an update on the actions identified in Wildflower's LCAP plan.

Establish math and reading intervention programs: One part of the intervention program at Wildflower is to have the Kindergarten teacher work in interventions in the afternoon after the kindergarten students have gone home. Wildflower Director Tom Hicks indicated a need to collaborate on steps to measure students in need of support and measuring impact of the interventions provided. The plan is to hire an intervention teacher next year to focus primarily on math – especially for the 7th and 8th grade program. The plan is to provide a push-in model for younger students and a pull-out program only for the student with the most needs. One step Wildflower took this year was to increase the amount of time spent on math instruction in the lower grades an additional 30 minutes per day. In addition, a computer program called Ten Marks was purchased to be utilized for individual support for students.

Align classroom curriculum to Common Core curriculum: This has been an on-going topic of discussion at weekly staff meetings. Also, Common Core aligned teacher materials were purchase as guides for teachers at all grade levels.

Establish a committee to develop recommendations and improvement plan for meaningful movement and PE: While this has been discussed and teachers are

individually working on this topic, a committee has not been established as for school-wide focus as not be set.

Develop improvement plan for access to technology: Wildflower has had Apple technology in place since the school opened, but it has not been utilized in a campus-wide fashion due to system restraints. In 2014-2015, a server was installed and a part-time computer consultant was hired. Director Tom Hicks indicated this had helped improve the use of technology on campus. One setback for Wildflower was the theft during a break in of iPads that were being prepared to be deployed to all teachers.

David Scott, Assistant Superintendent - Educational Services

On Thursday April 30th, the CUSD Charter School Review Team visited the Wildflower Open Classroom School at its location on Cohasset Road. The school will begin its fifth year of operation in 2015-16. Tom Hicks, Director of Wildflower Open Classroom School (Wildflower), provided an overview of the school’s programs, the Wildflower LCAP and progress. Instruction was observed in several of the classrooms during the visitation. Since relocating to its current location, the school has added several portable classrooms.

Student Support Services:

Wildflower Open Classroom School is presently a school of the District for special education services. The District provides the following services to Wildflower:

- 0.20 FTE Resource Specialist Teacher
- A/N FTE Speech Therapist (as needed per assessments and IEPs)
- A/N FTE School Nurse (as needed or called)
- A/N FTE Occupational Therapist (as needed per IEPs)
- 0.05 FTE School Psychologist (approximately 8 hours per month)

Wildflower students needing more intensive special education services (e.g. Special Day Class, etc.) are offered a placement in other programs provided by the District or SELPA.

In April 2014 there were eleven students with IEPs. As of May 2015, there are fifteen students with IEPs enrolled at Wildflower. The primary disabilities for these students are in five of the thirteen Federal disability categories as follows:

Autism	2 students
Other Health Impairment	3 students
Specific Learning Disability	4 students
Orthopedic Impairment	1 student
Speech or Language Impairment	<u>5 students</u>
Total	15 students

The current student enrollment at Wildflower is approximately 131 students. The percentage of students with IEPs attending Wildflower is approximately 11.45 percent. As reported in the December 1, 2014 SELPA Student Report, the percentage of students with IEPs in the District is approximately 13.17, in the Butte County SELPA 13.14, and approximately 11.31 percent for the state of California (2013-14 DataQuest Information).

Mr. Hicks reported the plans to hire another intervention teacher for the 2015-16 school year. Additionally, the school has purchased the College Preparatory Math (CPM) program for use as a reference in the 7th and 8th grades which will enable these students to transition to the high school math sequence used in the District's high schools.

Mr. Hicks reported that Wildflower has complied with state requirements regarding fire, earthquake and safety drills.

**Bob Feaster, Assistant Superintendent, Human Resources:
Personnel, Staff Performance**

A site visit was conducted on May 6, 2015 along with an interview of the Director. Based on this, Wildflower School meets the established criteria in this area. An issue in previous reviews was the school's lack of a retirement program for employees. That issue was corrected last year with the initiation of the school providing 6% of an employee's gross pay into a 457B account. The school deposits these funds at the end of the school year. They plan to provide a 3% salary increase to employees each year based on the financial health of the school. At this point, they project that they can do this for the next 3 years. The school plans to add a 3rd/4th grade class next year along with a portable classroom. They also plan on adding a .5 FTE intervention teacher next school year. This person will focus on improving math skills for students. The school currently employs 6 teachers, 2 of whom are retirees from STRS.

**Jaclyn Kruger, Director, Fiscal Services
Wildflower Open Classroom Charter School – 2014-2015 Financial Review**

Wildflower Open Classroom Charter School (WOC) is a K-8 charter school located in Chico, California. This is the 4th year of fiscal oversight provided by Chico Unified School District (CUSD) for WOC.

WOC contracts with Forest Ranch Charter School for its financial services.

2014-15 Original Budget:

WOC's Original Budget was adopted and submitted by July 1st, which is required by Ed Code. The Original Budget showed a positive change in fund balance of \$10K. The charter school also provided a multi-year projection which showed the 2014-15 budget as well as the forecasted budget for the two future years (15-16 & 16-17). All three years show a positive change in fund balance with reserves continuing to grow.

2013-14 Year End Unaudited Actuals:

The unaudited actuals report was approved by September 15th, which is required by Ed Code. WOC showed zero change in fund balance, which means that expenditures equaled the revenue. The ending fund balance was \$184,694, which equates to a 17% reserve.

2013-14 Audit Report:

WOC contracted with Matson & Isom to perform an external audit of the 2013-14 financial statements. There were no findings during the audit.

2014-15 First Interim Budget:

The first interim budget was approved and submitted to CUSD by December 15th, which is required by Ed Code. In this budget, total revenue increased by \$45K and total expenditures increased by \$27K as compared to Original Budget. Therefore, the positive change in fund balance is now \$28K.

2014-15 Second Interim Budget:

The second interim budget was approved and submitted by March 15th, which is required by Ed Code. In this budget, total revenue increased by \$3K and total expenditures increased by \$24K as compared to First Interim. Therefore, the positive change in fund balance is now \$7K. WOC estimates total fund balance at June 30th, 2015 to be \$192,121. If this estimate is correct, then the charter school will end the 2014-15 fiscal year with a 21% reserve.

Attendance:

P-2 average daily attendance (ADA) was reported at 126.41 for 2014-15 versus 119.63 reported in 2013-14. This difference shows an increase of 6.78 ADA.

Cash Flow:

WOC has submitted monthly cash flow statements. These cash flow statements provide a tool for both the charter school administration and CUSD to review actual receipts and expenditures as well as the projected in-flow and out-flow of cash in the future months. During the month of September 2014, WOC had to access its line of credit in order to have enough cash to cover all its financial obligations for the month. WOC repaid the line of credit in November 2014. Going forward, CUSD will continue to monitor the cash position of WOC.