



Annual Report 2013-2014

Submitted to
Oregon Department of Education

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Overview

Mission of Southwest Charter School

Southwest Charter School's mission is to provide a creative learning environment where students develop a sense of place and become stewards of the natural world and active citizens within our community.

Vision of Southwest Charter School

Our vision is to look beyond classroom walls. We believe that healthy communities are created by engaged, informed & compassionate citizens. Through service, integrated curriculum and experiential learning, we provide opportunities for our students to actively build relationships locally, inspiring them to become catalysts of change in a global community.

History of Southwest Charter School

February 2005	Portland Public Schools votes to close Smith Elementary. Group of parents, concerned about the limited educational options on the west side of Portland, pursues a charter.
May 2005	Secured federal planning grant via ODE
July 2005	Applied to PPS for a charter. PPS rejects application.
November 2005	SWCS appeals PPS's initial decision.
December 2005	PPS rejects the appeal.
January 2006	At the request of PPS, SWCS meets with PPS representatives to consider opening a west side, environmental focus-option. PPS, facing a budget shortfall, tables the idea of new educational option for west Portland
April 2006	SWCS submits an appeal to ODE.
October 2006	Mediation with PPS fails. With PPS, SWCS sends a letter requesting that the ODE staff begin evaluation of the SWCS application for sponsorship by the Oregon Department of Education Board.
April 2007	State Board of Education votes to charter SWCS.
September 2007	SWCS opens its doors as a K-6 school at 5839 SW Hood Avenue (29 children, three teachers). Ends first school year with 45 students.
Summer 2008	SWCS remodels to add fourth classroom, hires a fourth teacher and has over 80 students apply for 25 available spots. Begins the 2008-2009 school year with 60 students.
2008-2009	Building search leads to viable option at 0690 SW Bancroft. Spend over \$50,000 on tests required by the City to assure its seismic safety. Assured by City Planning Dept. in August that permits are "one week away." Later, after appeals as far as to the City Council, the City ultimately rejected our occupancy of 0690 SW Bancroft.
September 2009	SWCS opens in two locations (about 2 miles apart) with approximately 120 students.
October 2009	New possible building is located at our current home, 0640 SW Bancroft.
December 2009	Signed intent to lease at 0640 SW Bancroft
May 2010	Successfully granted a three-year renewal of our charter with the State Board of Education. Signed lease on 0640 SW Bancroft.

- September 2010 Started school year with about 150 students at Congregation Neveh Shalom near Hillsdale.
- October 2010 Receive first state report card as an "Outstanding" school.
- March 2011 Move into current home at 0640 SW Bancroft.
- September 2011 Begin first school year in new home with about 175 students.
- October 2011 Receive second state report card as an "Outstanding" school.
- September 2012 Begin second full school year in new home with 195 students, almost full capacity, and nearly 250 students on wait list.
- October 2012 Receive third state report card as a "Satisfactory" school (high-end).

Introduction

The purpose of Southwest Charter School (SWCS) is to provide a small, public school educational option for families primarily in the Southwest quadrant of the Portland Metro area. Our mission is to provide a creative learning environment where students develop a sense of place and become stewards of the natural world and active citizens within our community. Our guiding values emphasize retaining both small class sizes and small overall school size; high levels of community involvement; and authentic, place-based learning using the arts, sciences and civics as the primary lenses for our students' exploration of the world around us.

SWCS continues to enjoy a more stable existence as a State-sponsored public charter school. At the beginning of the 2013/2014 year, we had 193 enrolled students with a waiting list of 158 students.

Some of our major accomplishments in 2013/2014 include:

- Large improvement in our overall reading, math and science scores on the OAKS.
- Implementation of new math curriculum, *Singapore Math*.
- Successful fundraising with over \$80,000 raised to support programming at SWCS.
- Second year as a level 4 school on the newly revised Oregon School Report Card.
- Maintenance of both enrollment and waiting lists.
- Largest 7/8 classes yet.
- Implemented three new artists-in-residence.
- Hiring a part-time PE teacher instead of PE contractors.
- Hiring a part-time Arts instructor with City Arts Tax funds.
- Continued to identify needs and implement more professional development for teachers including full staff training in *Singapore Math* and joint training with Eagle Charter School in Education for the Future's school improvement techniques.
- Fourth year win for our 7th/8th grade students of the statewide Project Citizen project.

This report will summarize the structure of the school, present basic facts about our student demographics in the 2013/2014 school year, and highlight some of our curricular work during this last year. It will also touch on our successes thus far, goals for the future, and challenges we face.

General Information

School Calendar for 2013/2014

Event	Date(s)
SWCS Office Reopens	Monday, August 18, 2013
Professional Development & Planning	Monday, August 26 - Friday, August 30, 2013
Labor Day - School Closed	Monday, September 2, 2013
Professional Development & Planning	Tuesday, September 3, 2013
First Day of School for Grades 1-8	Wednesday, September 4, 2013
Kindergarten Assessments	Wednesday, September 4 - Friday, September 6, 2013
First Day of School for Kindergarten	Monday, September 9, 2013
Statewide In-service Day - No School for Students	Friday, October 11, 2013
Goal Setting Conferences - Students/Parents Attend Conferences	Friday, November 1 & Monday, November 4, 2013
Veteran's Day Holiday - School Closed	Monday, November 11, 2013
End of First Assessment Period	Friday, November 22, 2013
Teacher Planning - No School for Students	Monday, November 25, 2013
Thanksgiving Holiday - School Closed	Tuesday, November 26-29, 2013
Teacher Visit Day - No School for Students	Monday, December 9, 2013
Student's Last Day before Winter Break	Thursday, December 19, 2013
Winter Break - School Closed	December 20, 2013 - January 3, 2014
Student's First Day Back After Winter Break	Monday, January 6, 2014
Martin Luther King Holiday - School Closed	Monday, January 20, 2014
President's Day Holiday - School Closed	Monday, February 17, 2014
Conferences - Students/Parents Attend Conferences	Thursday, March 6 & 7, 2014
End of Second Assessment Period	Friday, March 21, 2014
Spring Break - School Closed	Monday, March 24 - Friday, March 28, 2013
Teacher Planning Day - No School for Students	Monday, March 31, 2014
Teacher Planning - No School for Students	Friday, April 11, 2014
Memorial Day Holiday - School Closed	Friday, May 23 - Monday, May 26, 2014
Last Day of School for Students	Friday, June 13, 2014
End of Third Assessment Period	Friday, June 13, 2014
Snow Make-up Days	Monday, June 16 - Tuesday, June 17, 2014
Last Day for Teachers	Tuesday, June 17, 2014
SWCS Office Closes for Summer	Wednesday, June 25, 2014

Overall School Schedule

Morning Breaks

9:45-10am – Paul (3/4) & Susan (3/4)
10-10:15am – Lisa (5/6) & Matt (5/6)
10:15-10:30am – Mike (1/2), Kristina (1/2) & Amanda (K)
10:45-11:00am – Anthony (7/8) & Sarah (7/8)

Lunch Recess – Tuesday/Thursday

11-11:30am – Paul (3/4) & Susan (3/4)
11:30-12pm – Lisa (5/6) & Matt (5/6)
12-12:30pm – Kristina (1/2), Mike (1/2) & Amanda (K)
12:30-1pm – Anthony (7/8) & Sarah (7/8)

PE Schedule – Mondays & Wednesdays

<u>Time</u>		<u>Class</u>	<u>Teacher</u>
10:35-11:20am	40min	7/8	Anthony/Sarah
11:25-12:10pm	40min	7/8	Anthony/Sarah
12:10-12:25pm		Break	
12:25-1:10pm	40min	5/6	Matt/Lisa
1:15-2:00pm	40min	5/6	Matt/Lisa

PE Schedule – Tuesdays & Thursdays

<u>Time</u>		<u>Class</u>	<u>Teacher</u>
10:35-11:05am	30min	1/2	Mike (T) & Kristina (Th)
11:15-11:45pm	30min	K	Amanda
11:45-12:00pm		Break	
12:00-12:40pm	40min	3/4	Susan
12:45-1:25pm	40min	3/4	Paul
1:30-2:00pm	30min	½	Kristina (T) & Mike (Th)

Other Specials

Fridays – 8:30-8:45am - All School Meeting – All classes
Tuesdays – Reading with Mrs. R – Grades K-2 (weekly)
Fridays - Artist-in-Residence – Grades K-8 – 4-5 weeks during Spring trimester

Sample Daily Classroom Schedules

Sample from November 2013

Time	K	1/2	1/2	3/4	3/4	5/6	5/6	7/8	7/8
	Amanda	Kristina	Mike	Susan	Paul	Lisa	Matt	Anthony	Elizabeth
8:20-8:45	Choice	Morning Work	Journals	Survey	Morning Meeting	Meeting	Meeting	Morning Meeting	Morning Meeting
8:45-9	Morning Circle	Morning Circle	Morning Routine	Morning Meeting	Literacy	5th Math	6th Literacy	7th Math	8th Hum
9-9:15	Math	2nd Math	1st Math	Literacy	Literacy	5th Math	6th Literacy	7th Math	8th Hum
9:15-9:30	Math	2nd Math	1st Math	Literacy	Literacy	5th Math	6th Literacy	7th Math	8th Hum
9:30-9:45	Math	2nd Math	1st Math	Literacy	Snack	5th Math	6th Literacy	7th Math	8th Hum
9:45-10	Snack	2nd Math	1st Math	Break	Break	5th Math	6th Literacy	Break	Break
10-10:15	Snack	Snack, Break	Snack	4th Math	3rd Math	Snack, Break	Snack, Break	Class Meeting	Class Meeting
10:15-10:30	Recess	Snack, Break	Recess	4th Math	3rd Math	6th Math	5th Literacy	Class Meeting	Class Meeting
10:30-10:45	Read Aloud	Phonics	Writer's Wkshp	4th Math	3rd Math	6th Math	5th Literacy	PE	8th Study Hall
10:45-11	Literacy	Phonics	Writer's Wkshp	4th Math	3rd Math	6th Math	5th Literacy	PE	8th Study Hall
11-11:15	Literacy	Writer's Wkshp	Writer's Wkshp	Recess	Recess	6th Math	5th Literacy	PE	8th Study Hall
11:15-11:30	Literacy	Writer's Wkshp	Writer's Wkshp	Recess	Recess	6th Math	5th Literacy	7th Study Hall	PE
11:30-11:45	Literacy	Writer's Wkshp	Writer's Wkshp	Lunch	Lunch	Recess	Recess	7th Study Hall	PE
11:45-12	Literacy	Writer's Share	Writer's Wkshp	Lunch	Lunch	Recess	Recess	7th Study Hall	PE
12-12:15	Recess	Recess	Recess	4th Math	3rd Math	Lunch	Lunch	7th Study Hall	PE
12:15-12:30	Recess	Recess	Recess	4th Math	3rd Math	Lunch	Lunch	Lunch	Lunch
12:30-12:45	Lunch	Lunch	Lunch	4th Math	3rd Math	Projects	PE	Recess	Recess
12:45-1	Lunch	Lunch	Lunch	Class Meeting	Class Meeting	Projects	PE	Recess	Recess
1-1:15	Quiet Time	Read to self	Reading	Class Meeting	Class Meeting	Projects	PE	8th Math	7th Hum.
1:15-1:30	Quiet Time	Literacy	Reading	Break	Break	PE	Projects	8th Math	7th Hum.
1:30-1:45	Outside	Literacy	Reading	Hand-writing	Projects	PE	Projects	8th Math	7th Hum.

1:45-2	Projects	Projects	Projects	Projects	Projects	PE	Projects	8th Math	7th Hum.
2-2:15	"Stone Soup" Play	Projects	Projects	Projects	Projects	Projects	Projects	7th Science	8th Hum
2:15-2:30	same	Projects	Projects	Projects	Projects	Projects	Projects	7th Science	8th Hum.
2:30-2:45	Clean-up	Clean-up	Clean-up	Projects	Class Jobs	Projects	Projects	7th Science	8th Hum.
2:45-3	Pack- up/Circle	Closing	Closing	Clean/ Closing	Closing	Jobs/ Closing	Jobs/ Closing	Jobs/ Closing	Jobs/ Closing

Student Demographics

Table 1 below summarizes the total students at the beginning and end of the school year.

Table 1 – Summary of student enrollment at beginning and end of 2010/2011.

Grade Level	Student Enrollment on 10/1/13	Student Enrollment at end of 2013/2014
K	22	22
1	21	22
2	21	22
3	22	19
4	24	24
5	20	19
6	24	22
7	22	20
8	17	16
Totals	193	186

Our enrollment drop between fall and spring was caused by a number of factors. Nine students left after the first of the year, many of them students with IEPs that were asked to leave by the district or whose parents left voluntarily because the IEP services here were insufficient. Filling spots after Winter Break is always more difficult as parents and students are reluctant to move mid-year. In some cases, we exhausted our waiting lists completely, such as at 3rd & 5th grade. In others, we simply ran out of time to get to all the students.

To help with this problem, we instituted a new procedure to try to move through the waiting lists more quickly offering only two school days to respond to offers of enrollment. We also began notifying parents, when there was an open spot in a certain grade level, that their student was now in the top five. This prompted many parents who were no longer interested because their students' were settled into other schools to notify us. This helped us get through the waiting list faster.

Eighty-eight percent (81.25%) of the 2013/2014 students were residents of the Portland Public School District (PPS), an increase of 7% over last year's total. Nearly 19% percent resided in other districts, including: Oregon City, Tigard/Tualatin, Parkrose, Hillsboro, North Clackamas, David Douglas, Gresham/Barlow, Beaverton and Lake Oswego.

School wide, the population was 39.5% female (similar to last year) and 60.5% male. Ten percent (10%) of our students qualified for free-and-reduced lunch in 2013/2014 a slight decrease from 11% in 2012/2013. Table 2 offers a racial/ethnic breakdown of our students.

Table 2 – Summary of SWCS student racial/ethnic backgrounds, 2013/2014.

Race/Ethnicity	Percent in 2013/2014	Percent in 2012/2013	Percent in 2011/2012	Percent in Portland Metro Area*
White (Hispanic)	4.4	6.4	4.9	10.9
White (non-Hispanic)	87.3	88.9	80.1	76.3
African American	2.2	4.2	2.9	2.7
Asian American/Pacific Islander	1.3	4.2	4.9	6
Native American	2.6	3.2	2.4	0.7
Multi-racial	6.4	11.6	10	3.2

*Source: US Census Bureau Data, 2010

Personnel

Employees & Qualifications

Table 3 – Description of SWCS Staff during the 2013/2014 school year.

Teacher/Administrator	Position	TSPC License/Registered	Degree	HQ to teach
Amanda McAdoo	Kindergarten	Multiple Subjects (MIDLVL), Multiple Subjects Self-Contained (ECE, ELE), Social Studies (ML, HS)	MA Education, specializing in early childhood education	HQ
Michael Martin	1/2	Initial I Teaching, Multiple Subjects Self-contained (ECE, ELE)	MAT	HQ
Kristina Engstrom	1/2	Initial I Teaching, Multiple Subjects Self-contained (ECE, ELE)	MAT	HQ
Paul Banta	3/4	Initial I Teaching, Multiple Subjects Self-contained (ECE, ELE)	MAT	HQ
Susan Hathaway	3/4	Standard Teaching, Standard Elementary	M.S.Ed.	HQ
Lisa Colombo	5/6	Initial I Teaching, Multiple Subjects Self-contained (ECE, ELE); Middle School Science (ELE); Middle School Language Arts (ELE)	Bachelor's of Arts & Education, specializing in Language Arts & Science	HQ
Matthew Gurrola	5/6	Initial I Teaching, Multiple Subjects (MIDLVL), Social Studies (HS, ML), Language Arts (HS, ML)*	MAT	HQ
Anthony Robinson	7/8	Initial I Teaching, Multiple Subjects Self-contained (MIDLVL), Advanced Mathematics (ML), Biology (HS), Basic Math (ML), Middle School Science*	MAT	HQ
Sarah Anderson	7/8	Initial I Teaching, Multiple Subjects Self-contained (ECE, ELE), MS Social Science (ML)*, MS Language Arts (ML)*	MA Education, specializing in science and environmental education	HQ
Elizabeth Webber Malmshemer	7/8	Substitute Any Specialty (PP-12)	BA, Sociology, Teaching License	HQ
Marc Molenkamp	PE	Initial I Teaching, Health Education (ML, HL), Physical Education (ML/HS), Multiple Subjects (MIDLVL)	MAT	N/A

Anne Gurnee	Education Director	Registered	MEd, specializing in program administration	N/A
Marlene Dorfman	Health, Information & Property Manager	N/A		N/A
Anna Wantz	Business Administrator	N/A		N/A
Karen Bennett	Accounting Administrator	N/A		N/A
Kathy Price	Aide, Before School Enrichment Coord.	N/A		N/A
Jonathan Swartout	Aide, After School Enrichment Coord.	N/A	BA, English, Theater, Writing	N/A

Recruitment Plan

Beginning with new hires for the 2012/2013 school year, we have begun to advertise our positions more widely and to specifically target some of the local education schools such as Portland State University, Concordia, Marylhurst and College of Lewis & Clark. We continued this practice in the 2013/2014 school year. We also are specifically reaching out to others in the education community who work with Place-based Education. Unfortunately, we had no student teachers in the 2013/2014 school year.

Hiring Procedure

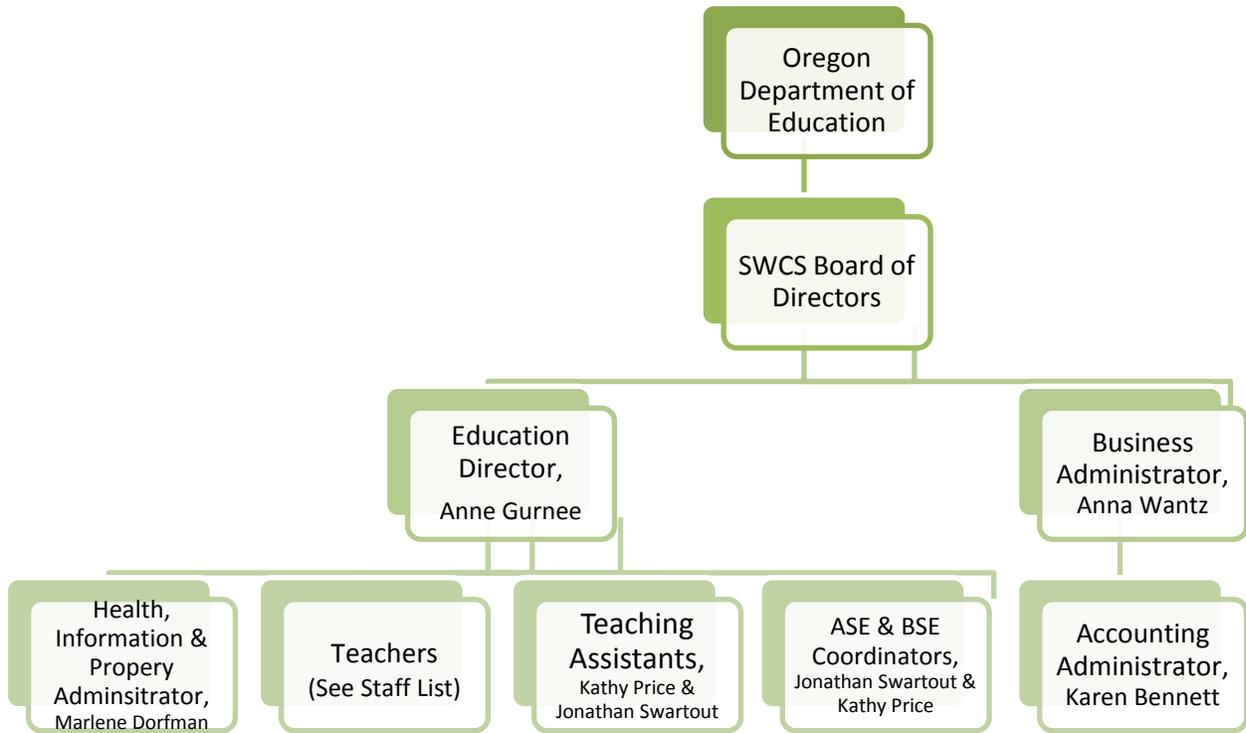
When a teacher is finishing a school year but will not return for the next school year, SWCS will first consider any interested current employees in good standing (teacher, administrative staff, and current student teachers). If a current employee is interested in the position, the Education Director will determine if a teaching sample is needed from the candidate(s). The Education Director will also convene a hiring committee to interview the candidate(s). The hiring committee can include: other staff members, parents, students, Board members. If those wanting to participate in the hiring committee exceed a reasonable number, the Education Director will hold a lottery to determine hiring committee members. If the hiring committee feels that an internal candidate is a good fit and qualified for the position, the position will be offered to the successful candidate. Throughout the process, the Education Director will keep the Board apprised of the process and decisions.

If no internal candidate is forthcoming, the Education Director will convene a hiring committee as described above, and the position will be advertised with appropriate media outlets. The hiring committee will coordinate the following steps:

- Resume screening
- Initial written question response
- Initial interviews (may be group format)
- Final interview
- Reference checks
- Teaching sample (when possible)
- Final decision and offer

When a teacher leaves mid-year requiring a quick replacement, a long-term substitute for the position will first be procured if needed, and then the above procedure will be followed as quickly as possible. In the interest of time, the Education Director may reduce the size of the hiring committee or may eliminate certain components of the normal hiring process as needed.

Staff Organizational Chart



Job descriptions for these positions for 2013/2014 are located in Appendix A.

Professional Development

The Board of SWCS continued in their commitment to professional development during the 2013/2014 school year. As a result, teaching staff and others were able to take advantage of a number of professional development opportunities throughout the year. Some teachers trained at individually selected courses on various topics such as:

- Portland State University's Connect 2 Science
- Education for the Future – School Improvement through Data
- PSU – Common Core for Language Arts
- School Garden Summit
- Common Core & Educator Effectiveness
- Severe Allergic Reaction & Medication Administration

As a staff we also did full staff trainings in:

- Singapore Math
- School Improvement with Education for the Future (with ODE & Eagle Charter)
- "Zones of Regulation"
- Bullying & Child Abuse Awareness Training
- First Aid/CPR Training
- Bloodborne Pathogens Training

To bring our new staff up-to-speed with our discipline program, Positive Discipline, the Education Director and a few other staff participated in a book club style weekly discussion with new staff members. We also initiated a new practice of allowing all teachers one sub day for doing observations in other classrooms throughout a full school day.

We continued one of our favorite low-cost, professional development method: our "School Visit Day." We intentionally plan a day in our school schedule that is a no-student day for SWCS, but is not a typical holiday or day-off for other schools. We use this day as a chance to visit other schools to learn more about their techniques and methods and to inform them about SWCS. This year, teams from SWCS visited:

- Lowrie Elementary
- Jane Goodall Environmental Middle School
- Emerson Charter School
- Portland Waldorf School

Staff Handbook

Our staff handbook was updated slightly this year and is included in Appendix B of this report.

Teacher Evaluation

We implemented a new teacher evaluation system this year. A copy of our Evaluation Tool is located in Appendix C of this report. Teachers met individually with the Education Director at the beginning of the year to set two goals: one that is measured by a standardized measure and another of their choosing. During the year, at least one formal observation occurred. These involved a pre-meeting with the Education Director to discuss the lesson plan, the observation, and a debrief (both written and in verbally) after the lesson. At the end of the school year, each teacher worked through a comprehensive matrix of professional skills and attributes to self-score themselves. The Education Director did the same, and then met with each staff to discuss the matrices, their differing and similar assessments and also to review the progress on their goals.

Teachers also were observed and offered more informal feedback regularly by the Education Director and their peers throughout the year.

Board of Directors

Members – Position & Term

Table 4 – SWCS Board Members during the 2013/2014 school year and their terms.

Board Member	Position	Term Ends
Aaron Britton	President	December 2014
Dennis Allen	Treasurer	December 2015
Ryan Wist	Secretary	December 2014
Brian Smith		December 2015
Jessica Nichols		December 2015
Laura Shier		December 2015
Josh Kirby		December 2015

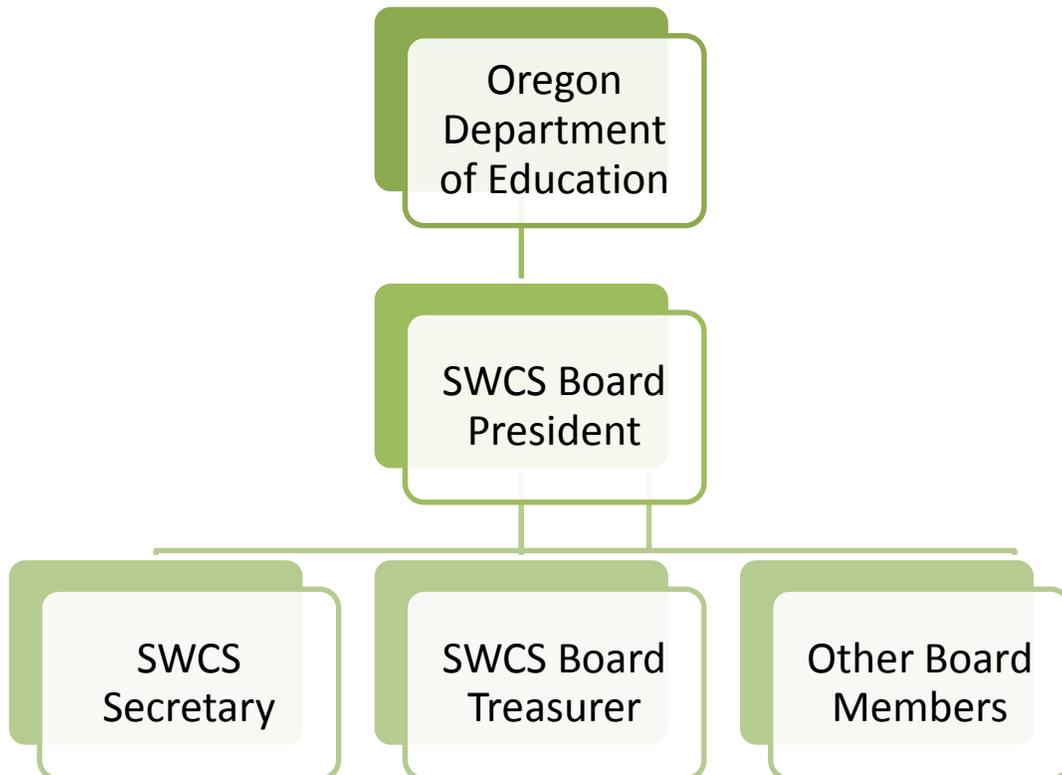
Board Meeting Minutes

See Appendix D.

Policies

See Appendix E.

Board Organization Chart



Professional Development

The Board engaged in no formal professional development in the 2013/2014 school year. However, they recognize their need for it and are currently seeking ways to improve their knowledge and function as a Board. They have a planned Board retreat in January 2015, and there will be some basic Board training included in this meeting.

Curriculum & Programs

Overview

Because SWCS is dedicated to place-based education, much of the curriculum is developed by the teachers. Place-based education strives to connect students to the natural, physical, and social community in which they live. Further, we use science, art and civics as the primary lenses to investigate that community. We strive for an integrated approach. "Water" was the overall curricular theme during the 2013/2014 school year. Math is the only discipline for which we have purchased a school-wide curriculum, *Singapore Math*, new to SWCS this year. All other curricula is developed by our teachers and tightly connected to our community and natural world. More teachers are beginning to use commercial curricula for core content though, and we are considering purchasing more in coming years.

The remainder of this section will offer one or two select experiences our students engaged in during the 2013/2014 school year in each grade level. In addition to the experiences described below, the students in each class worked on math, writing and reading daily, and enjoyed physical education two times per week. With monies raised through Run for the Arts, we brought in several Artists-in-Residence:

- Fall – Tina Ekton, visual artist – K-8 nature notebook drawings
- Winter – Comedy Sportz – K-8 improvisational comedy
- Spring – Laurie Washburne – K-4 music (folk singing)
- Spring – Christy Hawkins – 5-8 costume design (for our school musical)

We also produced our first musical production for grades 2-8, *Honk!, Jr.*

Evaluation of Curriculum Impact

We evaluate our curriculum impact in a number of ways including the state assessments (OAKS), classroom-based assessments (pre/post-tests, quizzes, writing samples, speaking opportunities, rubric-based project work, etc.) and through the portfolios built by our students. Several teachers also experimented with using EasyCBM in their classes as well this year. (For more on the formal assessment results please see the later section on Student Achievement.)

Special Education

Over the course of the 2013/2014 school year, 36 students (18.7%) received special education services, and/or speech/language support from Portland Public Schools, an increase over the 15.4% who received services in 2012/2013. Of those 36 students, SWCS worked to identify six of them during the 2012/2013 school year. Seven additional students had 504 plans. One of these students was identified this year.

Portland Public Schools had five personnel assigned to Southwest Charter:

- Learning Specialist – 0.5 FTE
- Speech Pathologist – 0.2 FTE
- Psychologist – 0.1 FTE
- Occupational Therapist – 0.05 FTE

The para-educator SWCS had in the 2012/2013 year was not assigned to SWCS again this year, in spite of the increase in the number of students requiring services. The learning specialist and speech pathologist, while both hard-working and dedicated to service, struggled to meet the stated IEP service minutes with the time allotted to them by the district. Perhaps as a result of this understaffing, nine students were moved to another school by PPS or by parents because the services at SWCS could not provide for their needs.

English Language Learners

We had no English Language Learners at SWCS during the 2013/2014 school year.

Other Special Populations

Increasingly, our special education population is noteworthy. With 18% of our students qualifying for special education services, parents are clearly searching for alternatives for their special needs students. Unfortunately, PPS continues to struggle to provide adequate services on site to serve their needs. That, coupled with the new trend to simply move high needs students to other schools, SWCS may not continue to be an alternative for all parents.

Although not typically defined as a special population, we consistently have a higher proportion of students who are male at Southwest Charter. In the 2013/2014 school year, 60% of our students were male compared with 51% in the PPS district. SWCS continues to attract boys, in part because of the changing landscape of neighborhood schools. Higher class sizes result in more seat-work, well documented as a poor learning model for boys in particular. Our parents are actively choosing our school because our model is more hands-on, project-based and includes ample field work which can appeal to active boys.

Sample Units

Kindergarten

As in the past, our Kindergarten students studied a local wetland, Oaks Bottom, during the spring trimester. As part of the study, they learned about common pond life and created art work depicting pond life. The hallmark of the study was their weekly trips to Oaks Bottom to see the flora and fauna up close. Students practiced informal science-based inquiry in and around the ponds at Oaks Bottom, asking questions, making connections and finding answers. They observed the life cycle of frogs, dragonflies and salamanders and learned the names of many native plants, animals, and birds that live in Oaks Bottom. Back in the classroom, the students demonstrated their knowledge and furthered their learning through the building of a wetland frieze that captured all the elements they believed a healthy wetland park should have.

Grade 1/2

One of the largest units of study for the 1/2 classrooms this year was about salmon. Students studied their biology, migration habits, and produced artwork based on our beautiful, local fish. Both 1/2 classes visited, independently, two different hatcheries to learn about the process of raising fish to augment our wild populations.

After spending much of the fall with salmon, the 1/2 classes turned to the ocean in the spring. They learned about intertidal life as well as larger forms of fish and mammals common in Oregon waters. As a culmination of their study, both classes travelled together to the tide pools at Haystack Rock near Cannon Beach for a full-day of exploration of the intertidal zone.

Grade 3/4

The 3/4 classes began their year with a large study of aquatic invertebrates, studying their biology and ecology. They went on field work to collect and study these small animals in the wild in local waterways which proved difficult so late in the season. They also created beautiful scientific illustrations of their favored species.

Later in the year, the 3/4 classes moved their focus to the history of the area with a specific emphasis on the Oregon Trail. They visited a number of sites to learn more about the trail while re-enacting the Trail experience in their classroom. They took on personas of early pioneers and struggled to determine how to survive the arduous trip.

Students in the 3/4 classes also studied how water in the Northwest is used to create power. They visited Bonneville Dam and learned about power generation. They then turned their focus to solar energy and created mock houses to study the effectiveness of solar energy as a power source.

Grade 5/6

During the fall, the 5/6 classes studied the water system in Portland. They performed many basic water chemistry experiments to learn about the physical and chemical properties of water. They then moved to field work that brought them visitors from the Clean Water Services of the City of Portland. They visited Bull Run and also learned about the wastewater system in the city. They also reenacted the recent fluoride debate to learn about the advantages and disadvantages of adding fluoride to our water.

In spring, to study the human body, students were enrolled, free of charge(!), into "medical school." During their course of study, they had to learn about the basic human body systems and then take the "MCAT" and "Boards" to assess their knowledge (they all passed). They then had to specialize and were assigned a mythical patient to learn about diagnose and propose a treatment. Working in teams, they presented their proposed course of action to their peers at "Grand Rounds." They also enjoyed a dissection day when several members of the local medical community came to the classroom to dissect a variety of animals and animal organs for the benefit of the students.

Grade 7/8

Grades 7/8 began the year with a Humanities study that took them to Japan. While reading, *Heart of a Samurai*, the class learned about Japanese culture both recent and historical. They visited the Samurai exhibit at the Portland Art Museum, enjoyed sushi lunch at a downtown restaurant, and had an amazing visit from scholars of Japanese culture. They continued the look into our region's Japanese culture by reading *Hotel on the Corner of Bitter and Sweet*. When on their class trip to Seattle in the spring, they visited the hotel featured in the book and discussed the changes in the community from then until now.

In science, they focused on the history of shipbuilding in the John's Landing neighborhood. They learned about the physics and engineering of shipbuilding, went on an in depth tour at the neighboring Zidell Marine facility, and built their own milk carton boats. A subset of 7/8 students participated in a unique experience, building a wooden row boat. Both their milk carton boats and their wooden boats had to wait until spring for their maiden voyages.

One of the most significant, place-based projects this year, was undertaken by the 7/8 in their study of the Civil War. As they learned about the conflict, each student was assigned a Civil War veteran who was buried in two historical cemeteries in Portland. They thoroughly researched the veterans, often using primary sources, and then, collaboratively, created a quest in each cemetery to guide visitors on a "tour" of grave sites of local Civil War veterans. The quests, created with the permission of Metro, the entity which governs and maintains these cemeteries, are still in place for visitors to enjoy anytime.

Field Work in 2013/2014

Field work is a hallmark of the curriculum at SWCS. Below is a list of the field work experiences our students engaged in during the 2013/2014 school year:

Kindergarten

Lee Farms
Zenger Farms
Northwest Children's Theater
Oregon Children's Theater
Oaks Bottom (multiple trips)
Art a la Carte
Johnson Creek Park
Local walking trips to Willamette River, Cottonwood Bay, Community Garden, Carruthers Park

Grades 1/2

Eagle Creek – Hatchery & Bonneville Dam
Oregon Children's Theater (2)
Portland Youth Philharmonic
Cannon Beach - Haystack Rock tide pools
Ballet at Marshall High School
PSU Engineering Department
Local walking trips to Willamette River, Cottonwood Bay, Community Garden, Carruthers Park

Grades 3/4

Gabriel Park
Central Library (multiple trips)
Riverplace
Marshall Park
Willamette Park
Bonneville Dam
OMSI
Philip Foster Farm
Welches
Cloud City
Zidell Marine Corporation
Sky High
Local walking trips to Willamette River, Cottonwood Bay, Community Garden, Carruthers Park and Willamette Park

Grades 5/6

Northwest Children's Theater

Bull Run Reservoir

Oregon Food Bank (multiple trips)

Oregon Children's Theater

OMSI's Camp Namanu (Columbia Gorge)

Lexi Dog/Oregon Humane Society

Local walking trips to Willamette River, Cottonwood Bay, Community Garden, Carruthers Park and Willamette Park

Grades 7/8

OMSI

Central Library (multiple visits)

Zidell Marine Corporation

Powell's Books

Portland Art Museum

Grand Army of the Republic Cemetery (multiple visits)

Lone Fir Cemetery

Oregon State House – Project Citizen

Portland City Hall

Seattle

- Experience Music Project
- Seattle Public Library
- Bainbridge Island
- American Youth Hostel

7/8 Internships (individual internships for each 7/8 students at a number of local nonprofits)

8th Grade Career internships (multi-day internships for 8th grade students)

Local walking trips to Willamette River, Cottonwood Bay, Community Garden, Carruthers Park and Willamette Park

Student Achievement

State Assessment Scores

Our students tested on the OAKS test primarily during the week of April 28-May 2, 2014. As a school, we prioritized a portion of our auction funds to purchase 32 Chromebooks for use in the classrooms and for testing. We set up a temporary computer lab in our great room (multi-purpose room) for the week of testing. Any students not finishing, or those needing to test in small groups or one-on-one, worked on their tests during the following weeks (May 5-22) in our smaller computer lab which houses just seven computers.

One hundred percent of our students participated in the OAKS test this school year. Table 5 below summarizes the results.

Table 5 – Summary of SWCS student performance on 2013/2014 and 2012/2013 Oregon State Assessments compared with the averages of PPS and the State.

Test	% of SWCS Students on IEP (13/14)*	SWCS % Exceeds or Meets (13/14)	PPS % Meets or Exceeds (13/14)	Statewide % Meets or Exceeds (13/14)	% of SWCS Students on IEP (12/13)*	SWCS % Exceeds or Meets (12/13)	PPS % Meets or Exceeds (12/13)	Statewide % Meets or Exceeds (12/13)
3 rd Grade (19)	32 (6)				12.5			
Reading		84	73	66		67	74	66
Math		63	65	60		29	69	61
4 th Grade (24)	17 (4)				30			
Reading		75	77	72		65	78	73
Math		58	71	64		60	72	64
5 th Grade (19)	16 (3)				8.3			
Reading		83	73	68		63	73	68
Math		72	67	59		50	66	58
Science		89	73	69		83	72	67
6 th Grade (22)	14 (3)				8.6			
Reading		77	71	65		78	67	57
Math		64	66	59		74	62	59
7 th Grade (20)	15 (3)				21			
Reading		90	76	74		90	75	73
Math		75	66	63		63	64	61
8 th Grade (16)	13 (2)				24			
Reading		94	71	67		77	69	67
Math		88	66	62		59	63	63
Science		94	67	65		71	63	66
Total (120)	18 (21)				16			
Reading		83	74 (73.3**)	69		72	74	69
Math		69	68 (66.7**)	61		55	67	61
Science		91	67 (70**)	67		78	64	66

*Data from SWCS. All other data from Oregon Department of Education.

**PPS Data with only 3rd-8th grade scores (no 11th grade scores).

National Assessment Scores

Unfortunately, our aging, donated computers could not keep pace with the changing technology requirements for the Northwest Evaluation Association's (NWEA) Methods of Academic Progress (MAP) test, so we opted to discontinue using the MAP test at the end of the 2012/2013 school year. Instead, we have used last school year and this one to explore other options for school-wide assessment.

We used the tests provided by the Singapore Math curriculum for our math assessments, and we began some pilot testing of the EasyCBM tests for reading/language arts. Because of its low-cost (e.g. free), we are using EasyCBM more extensively in 2014/2015 and will have more to report in next year's annual report.

Assessment Results Analysis

Overall, we saw growth in almost every grade and subject area last year. For the two grades where we did not see year-upon-year growth, we did see growth in each of those cohorts (grade 4 and grade 6). (Table 6 below summarizes our students' areas of increase and decrease in scores.) Overall, our average scores in reading grew by eleven percentage points, in math by fourteen percentage points, and in science by thirteen percentage points.

Table 6 – Areas of SWCS 2013/2014 score increase and decrease compared with scores from 2012/2013.

Areas of Increase in 2013/2014	Areas of Decrease in 2012/2013
3 rd reading	4 th math
3 rd math	6 th reading
4 th reading	6 th math
5 th reading	
5 th math	
5 th science	
7 th reading	
7 th math	
8 th reading	
8 th math	

When compared with other PPS schools and the state overall, SWCS again performed well. Our percentage meeting or exceeding in reading was higher than PPS in every grade except 6th. Our math scores were higher in grades 3, 5, 7 and 8. Compared with the state overall, our students meeting or exceeding in reading was higher than the state in all grades. More of our students met or exceeded benchmark in math compared with the state in 3rd and 5th-8th. As in years past, science continues to be an area of strength with our students' scores exceeding both PPS and the state in both 5th and 8th grade. Table 7 below summarizes these findings.

Table 7 – Areas where SWCS 2013/2014 scores were higher compared with scores from Portland Public Schools and the state as a whole.

Areas Where SWCS Scores Were Higher than PPS	Areas where SWCS Scores Were Higher than State
3 rd reading	3 rd reading
5 th reading	3 rd math
5 th math	4 th reading
5 th science	5 th reading
6 th reading	5 th math
7 th reading	5 th science
7 th math	6 th reading
8 th reading	6 th math
8 th math	7 th reading
8 th science	7 th math
Overall reading	8 th reading
Overall math	8 th math
Overall science	8 th science
	Overall reading
	Overall math
	Overall science

We attribute the 2013/2014 score increases to the following:

- Change in math curriculum from Bridges to Singapore Math
- Fidelity to the math curriculum
- Overall reduction of testing (discontinuation of NWEA testing)
- Increase in instruction in test-taking strategies
- Hard work on behalf of our students, teachers and families

Our requirement per our new contract was to meet or exceed PPS's scores or, if we were already higher, to score at least 1% higher. Happily, we reached these goals this year. Next year will serve as a new baseline year for us as the State's students take the new Smarter Balanced assessments in English/Language Arts and Mathematics.

Family Handbook

The SWCS Family Handbook for 2013/2014 is located in Appendix F.

Survey

ODE Survey Results

The results from the ODE 2013/2014 student/parent/staff survey are located in Appendix G.

Analysis & Plan of Action

ODE Staff Results Analysis (n=10)

On the ODE staff survey, 100% of the responses were between a 3 and 5 (“Strongly Agree”) on the 5-point scale. Fifty-seven percent (57%) were between 4 and 5. The top scoring comments were:

- I have the opportunity to think for myself, not just carry out instructions
- I believe student achievement can increase through:
 - Effective professional development related to our vision
 - Providing a threat-free environment
 - Close personal relationships between students and teachers
 - Addressing student learning styles
- I feel learning can be fun

The lowest scoring comments on the staff survey were:

Note: None of these fell below 3 on the 5-point scale

- I believe student achievement can increase through:
 - Teaching to the state standards
- My administrator is:
 - An effective instructional leader
 - Facilitate communication effectively
- I feel that others are clear about what my job is at this school

Standards

We feel strongly as a staff that while it is our obligation as a staff to follow the standards of the state of Oregon, they are not the driving force behind our teaching, mission or philosophy. As such, it is not surprising that we do not collectively see how they are tied to student achievement. We are forever striving to find innovative ways to deliver standards-based instruction that is embedded in our core philosophy and mission of place-based learning.

Instructional Leaders & Communication

We have made two distinctive changes to our administrative team this year. First, we have hired a part-time Curriculum Coordinator. The primary job description for this position is teacher support and leadership. We have also hired a part-time Field Work Coordinator to help bolster the support for teachers and our mission of place-based learning. We are optimistic that both these positions will help to strengthen the instructional leadership at the school. The job descriptions for both these positions will be included in the 2014/2015 Annual Report.

ODE Elementary Student Results Analysis (n=30)

Happily, our K-5 students responding to the survey almost universally agreed or strongly agreed with all the survey statements. Only six responses dipped below the 4-point line:

- When I am at school:
 - I belong
 - I have freedom at school
 - I have choices in what I learn
 - I am challenged by the work my teacher asks me to do
 - The work I do in class makes me think
- Students at my school treat me with respect

These concerns, similar to last year and coupled with the parents' concerns, are largely driving our goals for continued attention to respect and rigor.

ODE Middle School Student Results Analysis (n=8)

In the case of the middle school students (which for us includes grades 7 and 8), they too almost universally agreed or strongly agreed with the survey statements. Only four response were below the 4-point line:

- When I am at school:
 - I have fun learning
 - I have choices in what I learn
 - I am challenged by the work my teachers ask me to do
 - I can be a better student

It is notable, and perhaps age-appropriate, that the middle school students are the ones to admit to their need to "step-up" to the greater challenges posed by their teachers!

ODE Parent Results Analysis (n=76)

As with the other surveys, all the responses on the parent surveys were between 3.5 and 5 on the 5-point scale. Only the following comments dropped below the 4-point level:

- I am informed about my child's progress
- I know what my child's teacher expects of my child
- I know how well my child is progressing in school
- I like the school's report cards/progress reports
- My child's teacher helps me to help my child learn at home

These are a familiar theme and were similar to the lower-ranked items on last year's survey. Teachers already send weekly newsletters to parents to let them know what is happening in classrooms. Last year, we piloted a system where parents could check-in electronically on their student's grades and progress. Parents in the pilot class were initially enthusiastic, but then rarely used the system to monitor their child's progress. However, we are moving this year toward an electronic progress report system that will allow parents to check-in frequently.

School Improvement

Evaluation of Prior Year's Improvement Plan

Below are our goals for 2013/2014 and the progress made thus far:

1) *Increased academic rigor.*

This goal stems from the survey responses from both parents and students and from our desire to help our students perform better on standardized tests. Math is an area of primary concern here, but we are working on increasing the academic rigor in other areas as well. This goal also ties well to the implementation of the new Common Cores State Standards.

Our student achievement on the state tests this year stands as an important piece of evidence of our success with this goal, although, as previously state, we do not believe that increased rigor was the only reason for these gains. Much of what we did to increase rigor was very classroom-based and more difficult to measure. It will remain a goal for 2014/2015.

2) *Increased communication with parents about student performance and ways to support student work.*

As mentioned previously, we plan to implement, school-wide, an electronic progress report system that will allow parents the opportunity to check-in frequently about their child's progress. However, for younger students especially, we are still working at finding effective ways to communicate student's progress. Parents of younger students often need and want that personal connection with teachers to hear about a child's progress, as opposed to older students' grades and assignment completion data. We will continue to work on this goal in 2014/2015 as well.

3) *Increased respect between students.*

Respect has improved at SWCS, especially in the eyes of parents who did not list it as a great concern this year on surveys. In addition to our work with students through the philosophy of Positive Discipline, we also offered personal development opportunities to parents around healthy relationships, bullying and child abuse & prevention. We also worked with Safe Communities for Kids to provide bullying and child abuse & prevention workshops to all of our students as well.

4) *Improved recognition of staff.*

The Board has adopted a salary schedule in the last few years, but this year recognizes the need to adapt the schedule to growing salaries in the broader education field. We also began a more in-depth teacher evaluation process this year which offered more targeted feedback to teachers around their craft.

5) Increased partnerships with community partners to further our Place-based mission.

This year, each class selected and worked with a community partner during the year. Some partnerships were minimal and involved only one field work experience. Others however were more extensive and included multiple excursions. They all shared about their community partner with our school community and also via a visual display they created for the school. We are continuing to develop this program this year, and it will remain a goal in 2014/2015.

6) Continue a strategic planning process that guides SWCS's growth and development in the coming years.

We continued to work with the strategic planning process developed by Education for the Future at California State University at Chico. We did a joint training with Eagle Charter School staff in October 2013 to bring more of our collective staffs on board with the program. However, we struggle to find time to implement many of the critical steps for its development. This will remain a goal in 2014/2015.

7) Increase public awareness and community visibility of Southwest Charter School, particularly with diverse groups.

This is another persistent goal for our school. Our racial diversity has continued to remain steady at SWCS, and it reflects the neighborhood in which we are currently housed. However, we will continue to renew our investments toward increasing our visibility with diverse groups. We hope to both improve enrollment figures but also to increase our students' exposure to diverse communities.

8) Increase enrollment for 2012/2013 to fill the new facility.

Our enrollment hold steady from 2012/2013 to 2013/2014, but we are not yet full to capacity. Our 7th and 8th grade classes, where most of our openings have been of late, continue to slowly grow, and this year (2014/2015), it is the fullest it has ever been. We will be looking for new ways to market the school this year to increase enrollment and boost our waiting lists.

Goals & Plans

The following are our goals and plans for 2014/2015:

1) *Increased academic rigor.*

As mentioned above, we will be continuing to search for appropriate ways to increase the academic rigor for students at SWCS. As part of this goal, we would like to investigate how students interpret the phrases related to rigor on the year-end survey. What does “challenge” look like to them?

2) *Increased communication with parents about student performance and ways to support student work.*

Related to the above concept of rigor, we also would like to investigate with parents what kind of information they would like to have on their student’s progress. Do they want more tests? Do they want one-on-one conversations with teachers about their students? How could the progress reports be improved? We will also be asking about their feedback on the new electronic progress report as well.

3) *Improved compensation of staff.*

The Board is working toward an improved salary schedule for staff this year.

4) *Improved administrative support of staff.*

Our two new administrative positions of Field Work Coordinator and Curriculum Coordinator are both designed to provide more support for teachers. We will be evaluating how these administrative changes helped teachers as well.

5) *Increased partnerships with community partners to further our place-based mission.*

Our Field Work Coordinator will be working to more fully develop our community partnership program this year. We hope to add a new level of robustness with this program that truly matches our partner’s needs with support our school can offer and learning our students can gain. We also hope to develop places that each grade level adopts for a series of years to form long-term attachment to community resources.

6) *Continue a strategic planning process that guides SWCS’s growth and development in the coming years.*

The Board, for the first time, will be addressing this issue this year with a Board retreat in January. It will likely be a small first step toward the bigger plan for the coming years at SWCS.

7) *Increase public awareness and community visibility of Southwest Charter School, particularly with diverse groups.*

We truly believe that our model of learning can work for all kinds of learners. We will continue to seek out new and diverse ways to reach out to diverse communities to join Southwest Charter School.

8) Increase enrollment for 2012/2013 to fill our facility.

In past years, we have done very little paid marketing about our school. This year, we plan to invest more in marketing in order to help spread the word. We also will be mobilizing our parents to help distribute flyers and promotional materials throughout our community.

9) Increase survey response rate.

We would like to see a more robust response to the ODE surveys sent out this year. We do use this information to make decisions about the school, and we need information from the broadest segment of our population as possible in order to gain quality insights to guide our planning.

Parent/Community Engagement

Friends of SWCS

Last year, our support group, Friends of Southwest Charter School (FOSWCS), continued to provide much needed support for the school. They are primarily tasked with developing and implementing community building events and some of our bigger fundraising events during the year. They also play an increasingly important role in communication as well. Each class has a FOSWCS parent liaison that helps to support the teachers with their communication needs as well as get the word out on events and updates on a class-by-class basis.

FOSWCS meets monthly ahead of the regular Board meetings and reports on their activities at each Board meeting. Participation at FOSWCS meetings is typically about fifteen parents.

Volunteers

School wide, volunteers again offered over 4,000 hours of service at SWCS. Volunteers helped by chaperoning field work, helping out in classrooms, running school fundraisers, supporting our computer needs, serving on our Board, etc. SWCS would truly not be the same without our volunteers.

Family Handbook

The SWCS Family Handbook is located in Appendix F.

Community/Business Partners

SWCS worked closely with a host of community partners. Here's a sampling of those we worked with last year.

- Waterfront Foursquare Church – offered a secular, healthy relationship seminar open to parents and the community
- Communities for Safe Kids – Bullying & child abuse workshops for teachers, parents and students
- Immunization Workshop – Oregon Department of Health hosted workshop on immunizations
- Wind & Oar Boat School – hosted a subset of 7/8 students to build a wooden, oar-driven boat
- Mirabella Portland – hosted 7/8 interns, 1/2 students visited elderly residents on multiple visits
- Zidell Marine Corporation
- Rock & Roll Camp for Girls – hosted 3 sessions of their rock camp for girls in the Summer of 2012 and 2013
- South Portland Business Association – SWCS is a member
- Subway – donated food and allowed our children to use their restrooms during the Run for the Arts event
- Oregon Food Bank – hosted 5/6 students for 4 community service projects
- Portland Parks & Recreation – SWCS has a stewardship agreement with PPR with regard to Cottonwood Bay, a nearby natural area owned by the Parks.

- Metro Heritage Cemeteries – Worked with 7/8 students on Civil War Veteran Cemetery Quests
- City Hall – Worked with 7/8 students on Project Citizen project
- 7/8 Internship Partners
 - Mirabella
 - Park Place – Senior Living
 - Free Geek
 - Johnson Creek Watershed Council
 - The Dog House
 - Gray’s Landing – REACH
 - Courtyard at Mt. Tabor – Park
 - Tryon Creek State Park
 - Neighborhood House
 - American Red Cross
- Additionally, over 280 vendors donated to our annual auction in support of SWCS

Facilities

Details/Overview

During the 2013/2014 school year, we continued to work to make our building more comfortable and functional as a school building. We worked with our landlord to make some improvements to the school facility over the course of the year. Over the course of the year, we added the following:

- Improved drainage for the front play area
- Dig pit play area for younger students
- Increased storage in common areas and some classrooms
- Improved the IT system school wide
- Purchased 32 new Chromebooks for student use

Our students continue to take advantage of our neighboring community resources for learning including:

- The Willamette River
- Carruthers Park
- Portland Streetcar
- Willamette Park
- Cottonwood Bay
- Willamette Greenway Trail
- South Waterfront Community Garden

Our newest neighbor, the Federal Building for Immigration and Customs Enforcement, began occupancy in September 2013. In spite of the controversy regarding the building, there has been little impact on the school from their presence since their arrival.

Financial Management

Checks & Balance

Funding

State School Funding (SSF) represents the largest amount of SWCS's operating basis.

- Immediately following the completion of the monthly Cumulative ADM Collection Report the data is reviewed and enrollment and attendance information is entered into a spreadsheet that calculates the value due for the month reported. From this data SWCS creates an invoice and the expected value is incorporated into the accounting system.
- Meanwhile, the ADM report is submitted both ODE and PPS. After PPS's review a spreadsheet, much like SWCS's internal spreadsheet, is generated and transmitted electronically to SWCS reflecting the amount that will be transmitted to SWCS's account on or before the 25th of the month. SWCS staff compares the internal spreadsheet with the one received from PPS to verify the numbers agree. Any adjustments for fraction of cents, SSF increase, etc. are made by creating an invoice or credit memo as necessary.
- These funds are received via direct deposit. The electronic notification from the banking institution is checked against the invoice and the amount is received into the accounting system. At the end of each fiscal year funds expected and funds received are reconciled.

The remainder of funding for SWCS is comprised of program fees for Full Day Kindergarten, Before and After Care Enrichment Programs (ASE/BSE), donations and fundraising. SWCS staff creates invoices for program fees and receipts for donations and monies received for fundraising.

Control of Cash and Convertible Assets

- While SSF is directly deposited, the remaining fund transactions are completed by check, cash, credit card, and PayPal.
- The school provides drop box locations for payments by check or cash. These boxes are emptied daily. Checks and cash are logged in and kept secure in locations requiring a combination or key for access.
- Lagging, i.e. holding funds for a period of over a few days after receipt, is highly discouraged. One week is the maximum that regular funds can be held.
- Special fundraising events may have funds held during the active period of the specific fundraiser but funds & supporting documents are required to be placed in a secure location for evenings and weekends. Only authorized event individuals may retrieve the funds.
- Receipts are written for cash received. A three (3) part form is used for this purpose providing a copy for payee, copy to accompany payment, final copy remains in the receipt book.
- Payments and receipts are processed in a manner designed to minimize the amount of time between receipt and depositing. Procedures, such as a double count for cash, are in place to safeguard not only the individual presenting the cash to be held but also the individual accepting the cash.

- Deposit slips are generated from the accounting system. Individual items on each deposit are traceable back to their entry into the accounting system and are required to have supporting documentation. The individual making the physical deposit to the bank provides the deposit receipt received from the bank supporting documentation to another accounting staff member for review.
- Credit cards are utilized for some payments. While most card processing is done in person some are done over the phone. A limited number of key individuals are authorized to process credit card payments. Card information gathered for one time payments is destroyed immediately after processing the payment to prevent unauthorized use of the card. Card information for re-occurring payments is held in a secured location.
- Petty cash is limited to \$100 and is used mainly for making change.
- Transfers between accounts are made in most instances by check but may be made by electronic transfer if necessary. SWCS utilizes transfers at month end to move funds into the main account to cover expenses. Calculation of the amount needed made by Treasurer or Business Administrator and shared with Education Director for oversight.
- Signing authority is limited to a few key individuals. Signing authority is approved by the Board yearly at the July meeting.

Security Access

- Access to locations where checks or cash are held is limited to a few key employees to safeguard assets. Keys and combinations are kept secure and issued to key individuals. Blank checks and deposit slips are kept in these locations.

Monitoring Activities

- Prior to monthly closure SWCS's accounting staff complete the entry of all data to the accounting system.
- SWCS maintains a monthly closure and review process guided by a printed list. This process involves an external accountant who is retained to reconcile bank balances and review monthly financial statements. Bank statements are reviewed internally prior to the month end process and approved and signed off by the Treasurer or Business Administrator after the reconciliation process is complete.
- The external accountant and SWCS designated staff perform a thorough review of entries is completed during the month, comparing current to previous months by account and even by class. This external oversight provides a monthly monitoring of accounts and assists the audit process by identifying and performing any required adjustments close to the period being reviewed – minimizing year-end adjustments.
- AJE's created at month end are supported by documentation. AJE's are approved by either the external accountant or SWCS accounting staff member, someone other than the individual creating the journal entry.
- Included in this month end process is the creation of a report submitted to our Education Director which includes detailed banking/checking account activity, payroll activity, accounts payable and receivable. This report brings yet another individual into financial oversight.

- SWCS Treasurer or CFO reviews documents and records after monthly review. On a monthly basis the CFO or Treasurer presents a specialized financial report along with a profit & loss and balance sheets at the Board meeting.
- Additionally, SWCS, as a publically funded entity, is subject to an annual municipal audit. During the audit records and procedures are reviewed resulting in a report stating the financial condition of the school.

Expenditures

SWCS has differing types of expenditures. In each case there is a segregation of duties designed to provide checks and balances.

Accounts Payable

- An item received to be considered for payment is received, reviewed and categorized by chart of account number. The Business Administrator reviews and approves or provides the desired number. The Accounting Administrator typically enters the item into the accounting system.
- When an item is presented for payment that is not part of a standard/expected budgeted expense or one that has not been previously approved by other process the SWCS accounting staff actively engage the Education Director to ensure the item is due and payable by the school.
- Expenses approved by the Curriculum Coordinator, Fieldwork/Place Based Education Coordinator or FOSWCS are also approved by the Education Director.
- The Education Director reviews and approves all reimbursement requests received from staff, volunteers and community members.
- On a weekly basis the Accounting Administrator prints the current Accounts Payable list and presents it to the Treasurer or Business Administrator for review and approval of items to be paid. The list is returned to the Accounting Administrator for check printing.
- The checks are presented for signature with the backup documents supporting the payment attached below the check. All checks must have original supporting documentation to be considered for payment.
- A copy of the check stub is attached over the backup documents and filed by check number. The duplicate check copy is also filed in a separate location by check number.

Payroll, Payroll Reporting and Taxes

- Payroll duties are split between entering timesheets, reviewing final checks, and printing direct deposit receipts or live checks.
- SWCS uses an assisted payroll program which automates much of the process. The internal payroll procedure incorporates both the selected payroll program and task specific excel spreadsheets utilized to transform payroll data into information required to process PERS and payroll taxes.
- Monthly and quarterly payroll taxes are paid online.
- Quarterly reports are created in conjunction with the payroll program which either creates the report or provides data for creation of the report.

- Year-end tax forms are created using the automated payroll program and released only after verification against yearly records.

Credit Cards

- The Education Director and Business Administrator carry credit cards for purchase of supplies and materials for the school.
- SWCS has provided credit cards to selected teaching staff to carry on overnight/out of state field trips. The card is required to be returned to the office when the trip is complete.
- An agreement is held on file stating that personal purchases are not to be made on the cards.
- Original documentation for each purchase is submitted to the accounting department.
- Expenditures are categorized by one individual and entered into the accounting system by another.
- Reward points gained from the use of the cards are redeemed in the form of checks or credits to SWCS accounts. Funds received are used for the benefit of the school.

Organization/Flow of Money In/Out

Please see Appendix H.

Audit Status

We expect the audit to be completed on time this year. However, if it is delayed, it will be submitted to Oregon Department of Education as soon as it becomes available.

Local School District

Connections/Contacts

We work most closely with our resident district, Portland Public Schools, on matters relating to Special Education. Laretta Manning served as the Program Administrator over our school last year. We also work occasionally with Kristin Miles, the Senior Manager for Charter Schools at Portland Public Schools, and Katherine Hu in Research, Evaluation and Assessment, who acts as our District Test Coordinator.

One very disappointing development in this school year was the promise of State-sponsored participation in the new local arts tax. The law, passed by voters in 2012, funds arts teachers in grades K-5. We initially received funds in spring 2014 from the tax, but then we were notified in June 2014 that we were no longer going to be receiving the funds because we were not a part of the Portland Public School District. PPS assumed that the City had notified us of this new decision.

Federal Funds

SWCS received no Federal funds in 2013/2014.

Contracts

Please see Appendix I for a copy of the contract with Portland Public Schools.