



**Annual Report  
2014-2015**

**Submitted to  
Oregon Department of Education**

**By Anne Gurnee, Director  
Southwest Charter School  
Portland, Oregon**

**December 1, 2015**

# Table of Contents

Overview .....	2
General Information .....	8
Personnel.....	12
Board of Directors.....	17
Curriculum & Programs .....	19
Student Achievement .....	26
Survey.....	29
School Improvement .....	32
Parent/Community Engagement .....	36
Facilities.....	38
Local School District .....	43

## **Appendices sent as separate files with the SWCS 2013/2014 Annual Report**

- Appendix A – SWCS Job Descriptions
- Appendix B – SWCS Staff Handbook
- Appendix C – SWCS Teacher Evaluation Tool
- Appendix D – SWCS Board Meeting Minutes
- Appendix E – SWCS Policies
- Appendix F – SWCS 2013/2014 Family Handbook
- Appendix G – ODE Parent/Staff/Student Survey – 2014
- Appendix H – SWCS Strategic Plan – 2014/2015
- Appendix I – Organization/Flow of Money In/Out of SWCS
- Appendix J – SWCS Contract with Portland Public Schools for Special Education Services

## **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-April 2007

- Portland Public Schools voted to close Smith Elementary. Group of parents, concerned about the limited educational options on the west side of Portland, pursues a charter.
- Secured federal planning grant via ODE.
- Applied to PPS for a charter. PPS rejects application.
- SWCS appealed PPS's initial decision. PPS rejected the appeal.
- At the request of PPS, SWCS met 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.
- SWCS submitted an appeal to ODE.
- Mediation with PPS failed. With PPS, SWCS sent a letter requesting that the ODE staff begin evaluation of the SWCS application for sponsorship by the Oregon Department of Education Board.
- In April 2007, State Board of Education voted to charter SWCS.

2007/2008

- SWCS opened its doors as a K-6 school at 5839 SW Hood Avenue (29 children, three teachers). Ended first school year with 45 students.
- Received no State funds to operate until June 2008 because of contract dispute with PPS.
- In summer 2008, SWCS remodeled to add fourth classroom, hired a fourth teacher and had over 80 students apply for 25 available spots.

2008/2009

- Began the school year with 60 students.
- Expanded to four classrooms.
- Added 7<sup>th</sup> grade.
- Offered Spanish to all students K-7.
- Building search led to viable option at 0690 SW Bancroft. Spent 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.

2009/2010

- SWCS opened in two locations (about 2 miles apart) with approximately 120 students.
- Added 8<sup>th</sup> grade.
- Expanded to seven classrooms.
- Offered Spanish to all students K-8 for second year.
- New possible building is located at our current home, 0640 SW Bancroft.
- In December 2009, signed intent-to-lease at 0640 SW Bancroft.
- In May 2010, successfully granted a three-year renewal of our charter with the State Board of Education.
- Signed lease for 0640 SW Bancroft.

#### 2010/2011

- Started school year with about 150 students at Congregation Neveh Shalom near Hillsdale.
- Expanded to nine classrooms.
- Received first state report card as an "Outstanding" school.
- Suspended Spanish instruction due to lack of funding.
- 6/7/8 students won, for the first time, the state-wide Project Citizen competition.
- Offered our first play production for students in grades 6-8, "The Mousetrap."
- Held our first Run for the Arts fundraiser and brought the first Artist-in-Residence to SWCS.
- In March 2011, moved into current home at 0640 SW Bancroft.

#### 2011/2012

- Began first school year in new home with about 175 students.
- Received second state report card as an "Outstanding" school.
- Brought two Artists-in-Residence to SWCS with Run for the Arts funding.
- Expanded/improved our play area with funds raised through auction.
- Had our first student teacher placed at SWCS from Concordia.
- Tackled second play production with all 7/8 students, "Romeo & Juliet."
- 7/8 students won, for the second time, the state-wide Project Citizen competition.

#### 2012/2013

- Began second full school year in new home with 195 students, almost full capacity, and nearly 250 students on wait list.
- Received third state report card as a "Satisfactory" school (high-end).
- Bring two Artists-in-Residence to SWCS with Run for the Arts funding.
- State Board of Education grants SWCS a renewal and 5-year charter with the State.
- Have two student teachers at SWCS, one from Antioch New England and another from Concordia.
- Began Positive Discipline school-wide with comprehensive staff training.
- 7/8 students won, for the third consecutive year, the state-wide Project Citizen competition.
- 5<sup>th</sup>-8<sup>th</sup> grade students performed in "Up the Down Staircase."

#### 2013/2014

- Began school year with 193 students and nearly 160 on the wait list.
- Received fourth state report card, a "Level 4" school.
- Brought a variety of artists to classrooms and three Artists-in-Residence to SWCS with Run for the Arts funding.
- Raised over \$80,000 through our auction to support learning initiatives at the school.
- Received a fraction of the funding promised from the new Portland Arts Tax. Still able to provide music education for all students for one trimester.
- Selected and began instruction of new math program, *Singapore Math*.
- Hosted two-week visit from South Korean education students at SWCS.
- 7<sup>th</sup> grade students won, for the fourth consecutive year, the state-wide Project Citizen competition.

## 2014/2015

- Began school year with 187 students enrolled, 191 on the wait list.
- As a result of the Project Citizen work in the previous year, now 8<sup>th</sup> grade students work with Portland City Council to pass smoking ban in City of Portland parks.
- First full middle school with 24 students in both 7<sup>th</sup> and 8<sup>th</sup> grade class.
- Ended the school year with 206 students enrolled, 97 on the wait list.
- Received no Arts Tax money during the school year while all other Portland charters do. Instead spend time negotiating with City Hall to negotiate the restoration of this funding to SW Charter.
- Secured \$15,000 additional grant money from ODE to support technology improvement and enhancement at SW Charter.
- Held first day-long Board retreat in January and outlined strategic goals for the school.
- Raised the most money ever through our Run for the Arts fundraiser, brought multiple artists to classrooms, supported community arts projects and two theatrical productions.
- Worked with a group of other charter schools to advocate for SB820 (weighted lottery) and SB819 (equitable funding). SB820 passes and SB819 nearly does.
- With funds raised at auction (close to \$90,000), Field Work Coordinator hired to support place-based education at SW Charter.
- Restructured the administrative team to include a part-time Curriculum Coordinator to support the teachers and curriculum development at the school.
- 7<sup>th</sup> grade students win, for the fifth consecutive year, the state-wide Project Citizen competition.

## 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 2014/2015 year, we had 187 enrolled students with a waiting list of 120 students. By the end of the school year, we had 206 students enrolled.

Some of our major accomplishments in 2014/2015 include:

- Continued to outperform PPS on the new Smarter Balanced test in Reading and the OAKS test of Science. Less than two percentage points away from matching PPS performance in math.
- Successful fundraising with over \$100,000 raised to support programming at SWCS.
- Both 7<sup>th</sup> and 8<sup>th</sup> grades full for the first time since opening.
- As a result of the Project Citizen work in the previous year, now 8<sup>th</sup> grade students work with Portland City Council to pass smoking ban in City of Portland Parks.
- Continued to identify needs and implement more professional development for teachers including continued staff training in *Singapore Math*, Daily 5/Café training, Place-based education training, dyslexia and decoding training.
- Fifth year win for our 7<sup>th</sup> grade students of the statewide Project Citizen competition.
- Successfully negotiated with PPS and City Hall to reinstate the Arts Tax funding for the next school year.
- Secured \$15,000 additional grant money from ODE to support technology improvement and enhancement at SW Charter.
- Raised the most money ever through our Run for the Arts fundraiser, which brought multiple artists to classrooms and supported community arts projects and two theatrical productions.
- Worked with a group of other charter schools to advocate for SB820 (weighted lottery) and SB819 (equitable funding). SB820 passes and SB819 nearly does.
- With funds raised at auction, hired Field Work Coordinator to support place-based education at SW Charter.

- Restructured the administrative team to include a part-time Curriculum Coordinator to support the teachers and curriculum development.
- Hosted a regional group of Place-based educators (PBENW) at SW Charter to share our techniques, strategies and successes.
- Held day-long Board retreat and outlined strategic goals for the school.

This report will summarize the structure of the school, present basic facts about our student demographics in the 2014/2015 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 2014/2015

Event	Date(s)
Professional Development & Planning	Monday, August 25 - Friday, August 29, 2014
Labor Day - School Closed	Monday, September 1, 2014
Professional Development & Planning	Tuesday, September 2, 2014
First Day of School for Grades 1-8	Wednesday, September 3, 2014
Kindergarten Assessments & 1:1 Visits	Wednesday, Sept 3 - Friday, Sept 5, 2014
First Day of School for Kindergarten	Monday, September 8, 2014
Statewide Inservice Day - No School for Students	Friday, October 10, 2014
Goal Setting Conferences - Students/Parents Attend	Thursday, October 30 & Friday, October 31, 2014
Teacher Planning - No School for Students	Monday, November 10, 2014
Veteran's Day Holiday - School Closed	Tuesday, November 11, 2014
End of 1st Trimester	Friday, November 21, 2014
Teacher Planning - No School for Students	Monday, November 24, 2014
Thanksgiving Holiday - School Closed	Tuesday, November 25-28, 2014
1st Trimester Grades Posted	Friday, December 5, 2014
Teacher Visit Day - No School for Students	Monday, December 8, 2014
Student's Last Day before Winter Break	Thursday, December 18, 2014
Winter Break - School Closed	Friday, Dec 19, 2014 - Friday, Jan 2, 2015
Student's First Day Back After Winter Break	Monday, January 5, 2015
Martin Luther King Holiday - School Closed	Monday, January 19, 2015
President's Day Holiday - School Closed	Monday, February 16, 2015
Conferences - Students/Parents Attend	Thursday, March 5 & 6, 2015
End of 2nd Trimester	Friday, March 20, 2015
Spring Break - School Closed	Monday, March 23 - Friday, March 27, 2015
Teacher Planning Day - No School for Students	Monday, March 30, 2015
2nd Trimester Grades Posted	Friday, April 3, 2015
Teacher Planning - No School for Students	Friday, April 10, 2015
Memorial Day Holiday - School Closed	Friday, May 22-25, 2015
Last Day of School for Students	Friday, June 12, 2015
End of 3rd Trimester	Friday, June 12, 2015
Snow Make-up Days	Monday, June 15 - Tuesday, June 16, 2015
Last Day for Teachers	Tuesday, June 16, 2015
3rd Trimester Grades Posted	Friday, June 19, 2015
SWCS Office Closes for Summer	Wednesday, June 24, 2015

## Overall School Schedule

### Morning Breaks

9:45-10am – Courtney (3/4) & Susan (3/4)  
 10-10:15am – Lisa (5/6) & Karinsa (5/6)  
 10:15-10:30am – Mike (1/2), Nesa (1/2) & Amanda (K)  
 10:45-11:00am – Chris (7/8) & Sarah (7/8)

### Lunch Recess

11-11:30am – Courtney (3/4) & Susan (3/4)  
 11:30-12pm – Lisa (5/6) & Karinsa (5/6)  
 12-12:30pm – Nesa (1/2), Mike (1/2) & Amanda (K)  
 12:30-1pm – Chris (7/8) & Sarah (7/8)

### Upper School PE Schedule – Mondays & Wednesdays

<u>Time</u>		<u>Class</u>	<u>Teacher</u>
11:20-12:00pm	40min	7th	Chris
12:00-12:30pm	30min	Break	Break
12:30-1:10pm	40 min	5/6	Karinsa
1:15-1:55pm	40min	5/6	Lisa
2:00-2:40pm	40min	8th	Sarah

### Upper School Health Schedule – Fridays

<u>Time</u>		<u>Class</u>	<u>Teacher</u>
10:30-11:10am	40min	7th	Chris
11:15-11:55am	40min	8th	Sarah
12:00-12:40pm	40 min	5/6	Lisa
12:45-1:25pm	40min	5/6	Karinsa

### Lower School PE/Health Schedule – Tuesdays & Thursdays

<u>Time</u>		<u>Class</u>	<u>Teacher</u>
10:30-11:10am	40min	K	Amanda
11:20-12:00pm	40min	1/2	Nesa (T) & Mike (Th)
12:00-12:30pm	30 min	Break	Break
12:30-1:10pm	40min	1/2	Nesa (Th) & Mike (T)
1:15-2:05pm	50min	3/4	Courtney
2:10-3:00pm	50min	3/4	Susan

### Other Specials

Fridays – 8:40-9:05am - All School Meeting – All classes

## Sample Daily Classroom Schedules

Sample from March 2015

Time	Grade K Amanda/Amy	Grade 1/2 Mike	Grade 1/2 Nesa	Grade 3/4 Susan	Grade 3/4 Courtney	Grade 5/6 Lisa	Grade 5/6 Karinsa	Grade 7 Chris	Grade 8 Sarah W
9-9:15	Math	Math (Gr. 1)	Math (Gr. 2)	Literacy	Literacy	Math (Gr. 6)	Math (Gr. 5)	Math (Gr. 7)	Project Work (Gr. 8)
9:15-9:30	Math	Math (Gr. 1)	Math (Gr. 2)	Literacy	Literacy	Math (Gr. 6)	Math (Gr. 5)	Math (Gr. 7)	Project Work (Gr. 8)
9:30-9:45	Math	Math (Gr. 1)	Calendar	Literacy	Literacy	Math (Gr. 6)	Math (Gr. 5)	Math (Gr. 7)	Project Work (Gr. 8)
9:45-10	Snack/Read-a-loud	Math (Gr. 1)	Class Meeting	Break	Break	Math (Gr. 6)	Math (Gr. 5)	Math (Gr. 8)	Project Work (Gr. 7)
10-10:15	Snack/Read-a-loud	Snack	Snack	Math (Gr. 4)	Math (Gr. 3)	Break	Break	Math (Gr. 8)	Project Work (Gr. 7)
10:15-10:30	PE/Health	Break	Break	Math (Gr. 4)	Math (Gr. 3)	Literacy	Literacy	Math (Gr. 8)	Project Work (Gr. 7)
2-2:15	Cottonwood Bay	Cottonwood Bay	Community Garden	Closing Circle	PE/Health	Civics	Civics	Presentations (Gr. 7/8)	
2:15-2:30	Cottonwood Bay	Cottonwood Bay	Community Garden	PE/Health	Cursive	Civics	Civics		
2:30-2:45	Clean-up/Closing Circle	Cottonwood Bay	Community Garden	PE/Health	Literacy	Civics	Civics		
2:45-3	Clean-up/Closing Circle	Clean-up/Closing Circle	Clean-up/Closing Circle	PE/Health	Clean-up/Closing Circle				

## 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 2014/2015.**

Grade Level	Student Enrollment on 9/18/14	Student Enrollment at end of April 2015
K	20	22
1	21	22
2	21	22
3	22	24
4	17	24
5	21	24
6	20	20
7	22	24
8	23	24
Totals	187	206

Last year, we instituted new procedures to try to move through the waiting lists more quickly which helped us to move efficiently through our waiting lists to fill most spots available.

Eighty-one percent (81%) of the 2014/2015 students were residents of the Portland Public School District (PPS), an decrease 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 41% female (similar to last year) and 58% male. Seventeen percent (17%) of our students qualified for free-and-reduced lunch in 2014/2015, a significant increase from 10% in 2013/2014. Table 2 offers a racial/ethnic breakdown of our students.

**Table 2 – Summary of SWCS student racial/ethnic backgrounds, 2014/2015.**

Race/Ethnicity	Percent in 2014/2015	Percent in 2013/2014	Percent in 2012/2013	Percent in Portland Metro Area*
White (Hispanic)	8.7	4.4	6.4	10.9
White (non-Hispanic)	92.8	87.3	88.9	76.3
African American	2.9	2.2	4.2	2.7
Asian American/Pacific Islander	8.7	1.3	4.2	6
Native American	4.3	2.6	3.2	0.7
Multi-racial	8.7	6.4	11.6	3.2

\*Source: US Census Bureau Data, 2010

# Personnel

## Employees & Qualifications

**Table 3 – Description of SWCS Staff during the 2014/2015 school year.**

Teacher/Administrator	Position	TSPC License/Registered	Degree	HQ to teach
Amanda McAdoo	Kindergarten	Registered, Multiple Subjects Self-contained, ECE	MA Education, specializing in early childhood education	HQ
Amy Gannon	PM Kindergarten Aide	Registration	BA English	N/A
Michael Martin	1/2	Initial II Teaching, Multiple Subjects Self-contained (ECE, ELE)	MAT	HQ
Nesa Levy	1/2	Initial I Teaching, Multiple Subjects Self-contained (ECE, ELE)	MAT	HQ
Courtney Miller	3/4	Registration	MEd	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)	Bachelors of Arts & Education, specializing in Language Arts & Science	HQ
Karinsa Kelly	5/6	Initial I Teaching, Multiple Subjects Self-contained (ECE, ELE)	MAT; Masters of Science Teaching	HQ
Chris Wyland	7/8	Registration	BS Biology Education; MEd Educational Technology (in process)	HQ
Sarah Whitcher	7/8	Initial I Teaching, Language Arts (HS & MS), Multiple Subjects (MIDLVL)	MAT	HQ
Marta Ciocca Vasino	PE	Registration	BA Philosophy & Psychology	N/A
Anne Gurnee	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 Coor.	N/A		N/A
Jonathan Swartout	Aide, After School Enrichment Coor.	N/A	BA, English, Theater, Writing	N/A

### Recruitment Plan

Beginning in the 2012/2013 school year, we began 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 to the present day. We are also specifically reaching out to others in the education community who work with Place-based Education. Unfortunately, we had no student teachers in the 2014/2015 school year, but we do have a current Lewis & Clark student teacher here for the 2015/2016 school year.

### Hiring Procedure

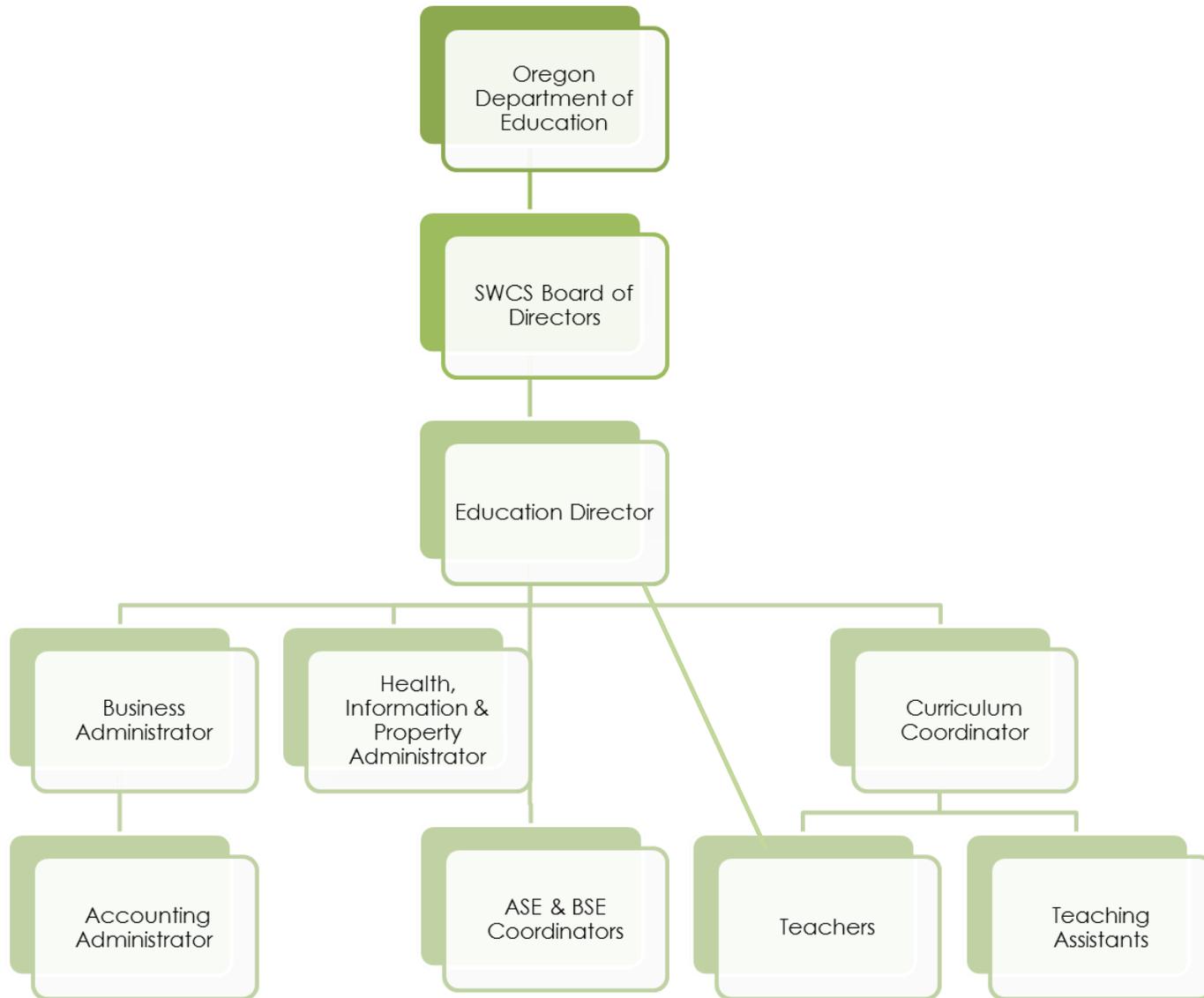
When a teacher is finishing a school year but will not return for the next school year, SWCS will first consider any interested current employees in good standing (teacher, administrative staff, and current student teachers). If a current employee is interested in the position, the Education Director 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 2014/2015 are located in Appendix A.

## **Professional Development**

The Board of SWCS continued in their commitment to staff professional development during the 2014/2015 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:

- Daily 5/Café
- Scottish Storyline
- PSU – Writing
- Reading
- ODE's Professional Learning Team Conferences
- Severe Allergic Reaction & Medication Administration

As a staff we also did full staff trainings in:

- Singapore Math
- Dyslexia & Reading Disorders
- Place-based Learning
- First Aid/CPR Training
- Bloodborne Pathogens Training

We also repeated a 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 methods: 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, for the first time, we all visited the same school, Sauvie Island Academy. We spent the day meeting with staff, visiting classrooms and learning more about their approach to Place-based learning.

## **Staff Handbook**

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

## **Teacher Evaluation**

We repeated and continued to refine our 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 Director and Curriculum Coordinator 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 Director and/or Curriculum Coordinator to discuss the lesson plan, the observation, and a debrief (both verbally and in writing) after the lesson. Formal observations were also guided this year by a new observation matrix that we gleaned from an Oregon Department of Education training event. (This matrix is also located in Appendix C.) At the end of the school year, each teacher worked through a comprehensive matrix of professional skills and attributes to self-score themselves. Administrators 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 Director and Curriculum Coordinator throughout the year.

# Board of Directors

## Members – Position & Term

Table 4 – SWCS Board Members during the 2014/2015 school year and their terms.

Board Member	Position	Term Ends
Aaron Britton	President	December 2015
Dennis Allen	Treasurer	December 2015
Josh Kirby	Secretary	December 2015
Brian Smith		December 2015
Jessica Nichols		December 2015
Laura Shier		December 2015
Jeff Winkley		December 2016

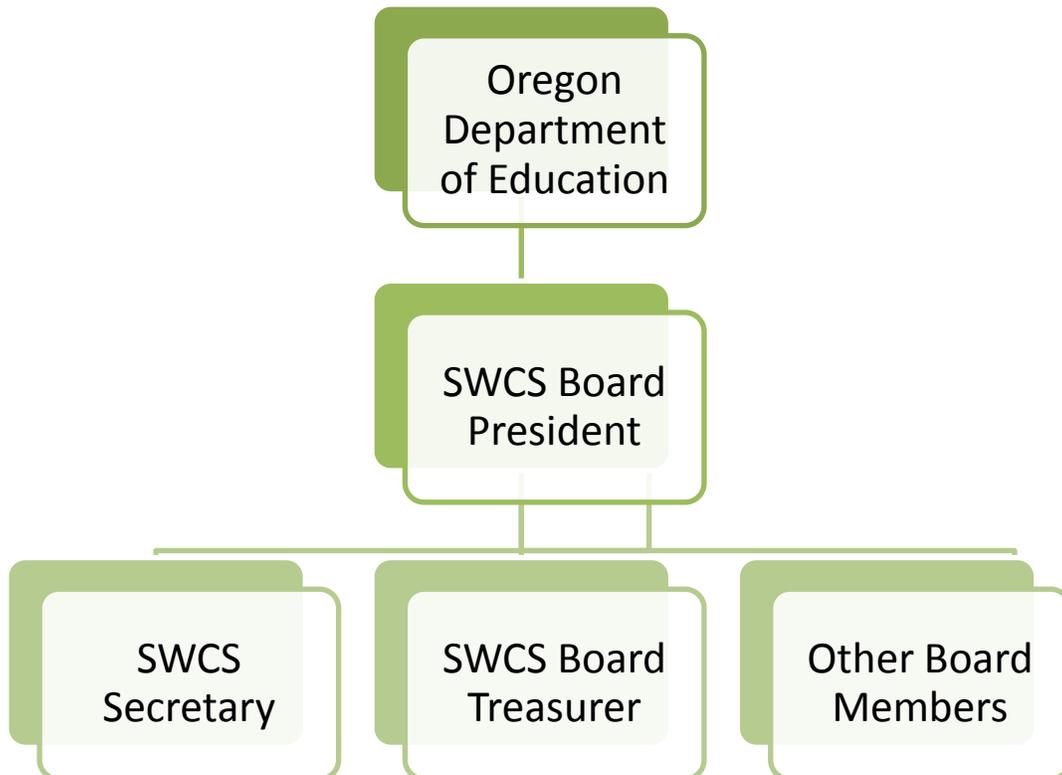
## Board Meeting Minutes

See Appendix D.

## Policies

See Appendix E.

## Board Organization Chart



## **Professional Development**

The Board engaged in no formal professional development in the 2014/2015 school year. However, the Board planned & orchestrated the first, day-long retreat in January 2015. The event, which was held offsite, was announced publicly and some members of the staff also participated. The Board developed four strategic goals for the school during the retreat. These goals are included later in this report.

# 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. "Earth" was the overall curricular theme during the 2014/2015 school year. Math is the only discipline for which we have purchased a school-wide curriculum, *Singapore Math*, in its second year of use at 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 selected experiences our students engaged in during the 2014/2015 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 one Artist-in-Residence in the spring, Aaron Nigel Smith, who taught K-6 singing & movement and 7/8 African drumming. Several classes also brought in artists from a variety of disciplines to share art with our students. Some of the offerings last year included Native American storytelling, glass fusing, and painting and mural work.

We also produced two theatrical productions:

- Fall – *The Trial of Goldilocks* – for grades 5-8
- Spring – *Willy Wonka & the Chocolate Factory* – for grades 2-8

## Evaluation of Curriculum Impact

We evaluate our curriculum impact in a number of ways including the state assessments (OAKS/SBAC), 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 regularly use EasyCBM in their classes and DRAs. (For more on the formal assessment results please see the later section on Student Achievement.)

## Special Education

Over the course of the 2014/2015 school year, 34 students (16.5%) received special education services, and/or speech/language support from Portland Public Schools, a decrease from the 18.7% who received services in 2013/2014. Of those 34 students, all were identified in previous years. Eight additional students had 504 plans. One of these students was identified this year.

Portland Public Schools had four personnel assigned to Southwest Charter:

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

In spite of the consistently high numbers of students at SWCS, PPS continued to offer the same level of staffing. 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.

### **English Language Learners**

We had no English Language Learners at SWCS during the 2014/2015 school year.

### **Other Special Populations**

As with previous years, our special education population is noteworthy. With 16.5% 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 at SWCS 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 2014/2015 school year, 58% 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. We have had fewer boys and more girls each year though, so perhaps we may be slowly equalizing the genders at SWCS.

### **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. The teacher also brought in an external artist to create fused glass insects as part of their creative learning adventures.

### **Grade 1/2**

In the spring, the first and second grade students dove deeply into a food unit, with a focus on food security. They asked guiding questions such as:

- Where does food come from?
- Where do we buy food?
- What happens when you can't afford to buy food?

Our 1/2 teachers read several books in the classroom concerning hunger and related social services (such as *Uncle Willie and the Soup Kitchen* by DyAnne DiSalvo-Ryan) and led discussions with their students to help them better understand this important and often misunderstood topic. The classes also toured Whole Foods and Costco, for a "behind-the-scenes" look at the food industry, and one of the 1/2 classrooms recreated a grocery store in their classroom.

Both classes also engaged in service-learning events. One 1/2 class toured Lift Urban Food Pantry and helped hand out food to visitors. The other 1/2 class shopped for sandwich ingredients at Whole Foods, made sack lunches, and handed them out to individuals in need through a program at St. Michael's Church in downtown Portland. Both classes reported having very rich, educational experiences -- they definitely received as much as they gave (if not more).

Lastly, the first and second graders made multiple trips to Kailash Ecovillage's garden, a sustainability-focused intentional community in inner southeast Portland. While there, the students performed some garden work, and they plan to share their garden plot harvest with a local food pantry.

### **Grade 3/4**

Our 3/4 students spent the spring trimester studying Portland history, with a special focus on bridges. Both classes went on a walking tour of downtown and toured our bridges from the unique perspective of a jet boat.

One of the 3/4 classes learned about Portland history by making timeline books to learn about the critical period in Portland history from 1845 to 1905. To go along with these, students kept journals from the perspective of someone living at that time to reflect on all the changes Portland was undergoing. Among other events, students "endured" the great fire of 1873, and they learned about a major flood that affected Portland.

The other 3/4 classroom chose one landmark, organization or business in Portland to study. They researched the history, location and why it is important to our city. Students created brochures for their places, which included maps and pictures, and wrote out and rehearsed final oral presentations which they did for a small group of peers standing in front of their place after they handed out brochures. The class then compiled the videos of presentations into a movie on Portland and sent the kid-made brochures to the locations.

This classroom also created models of the Portland bridges. Students worked individually to build their trusses and do their research, and then worked in groups to present their research and make bridge models. The final bridge models included working vertical lift and bascule draw bridge features. At the end of the unit, the class presented their models of eleven of the twelve Portland bridges, each accompanied by a plaque which displayed student research.

### **Grade 5/6**

In the winter of 2015, to prepare our 5/6 students for an in-depth investigation into Portland's African-American history, our 5/6 teachers led students in a week-long conversation about the recent police shootings of black men as covered by the national media. The teachers then led a month-long study of the Civil Rights Movement from the 1950s and 1960s through documentary clips, books, and activities. As part of this study, students wrote biographies on different Civil Rights leaders.

In February, the unit focused on local black history. The teachers taught about eight notable topics in Portland's past and present:

- the exclusion laws of the 1800s
- the Vanport flood
- the passing of Civil Right laws in the 1950s
- housing discrimination
- church as community
- urban renewal and gentrification
- riots in the 1960s
- school segregation

Diane Hess, from the Fair Housing Council of Oregon, presented to the class, and Ed Washington, former resident of Vanport, shared about his childhood. The class also visited the Oregon Historical Society to view a temporary exhibit put on by the Black Pioneers titled "A Community on the Move."

The study culminated in a day-long scavenger hunt of Portland sites related to black history. In each location, students read about a significant event that had occurred on that spot, completed a short journal entry and took photos. During that afternoon, students saw where the Vanport neighborhood had stood before it was wiped out by flood waters. They also:

- Visited a park where a riot had broken out in the turbulent days of the late 1960s
- Stopped by the Vancouver Street First Baptist Church, where some of the largest Civil Rights rallies took place
- Explored the Golden West Hotel, where many of Portland's new African-Americans stayed in the late 1890s
- Investigated Emanuel Legacy Hospital, which had only been built after displacing hundreds of African-American families in the 1970s
- Visited Jefferson High School
- Stopped at the Urban League to learn about its role in Civil Rights, both past and present

Back in the classroom, the students worked with local artist, Lisa Eisenberg, to create a comic book based on the events they learned about. With help from Marc Moscoto, from the organization "Know Your City," they held a "release event" at the Oregon Historical Society for the students to present their completed "zine."

### **Grade 7/8**

In winter 2015, our 7/8 students tackled the challenging topic of immigration. For middle school students tuning into recent news, there are many questions:

- Why is there so much debate about immigration?
- How did we get to our current legal position on immigration?
- What are the different perspectives and who has them?

As part of this study, students went on two walking tours of historical immigrant neighborhoods in Portland: Japantown, and South Portland. Irma Valdez, a local immigration lawyer, spoke with the class about her work and about current policy. Other guest speakers included Detective Keith Bickford, head of the Human Trafficking Task Force in Portland, and Abdiasis Mohamed from Portland's Immigration and Refugee Community Organization. In addition to learning about the history of national policy, students participated in a storyline in which they assumed the identities of different stakeholders within the debate. This allowed them to think more personally about all sides of the issue.

As a culminating event, students hosted a naturalization ceremony at Southwest Charter on Thursday, March 12<sup>th</sup>, 2015. The 7<sup>th</sup> and 8<sup>th</sup> graders welcomed 10 new citizens to the United States by decorating the Great Room with flags created by the students from the 10 countries represented by the new citizens, providing food and drink for a reception, and singing the national anthem. After the ceremony, students also had the opportunity to interview the new residents and learn more about their story. Two local newspapers covered the event. Several parents attending commented on how powerful the experience was for them and their students.

## **Field Work in 2014/2015**

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 2014/2015 school year:

### **Kindergarten**

Lee Farms  
Zenger Farms  
Rosse Posse Elk Farm  
Birkemeier Hazelnut Farm  
Northwest Children's Theater  
Tears of Joy Puppet Theater  
Oregon Children's Theater  
Oaks Bottom Wildlife Refuge (multiple trips)  
Tryon Creek State Park (multiple trips)  
Art a la Carte  
Local walking trips to Willamette River, Cottonwood Bay, Community Garden, Carruthers Park

### **Grades 1/2**

Portland Chinese Gardens  
Portland Japanese Gardens  
Kailash Ecovillage  
Mt. Hood National Forest  
Mt. Tabor Park  
Portland State University Geology Department Tour  
Whole Foods Market  
Costco  
Lift Urban Food Pantry  
Oregon Children's Theater  
Portland Youth Philharmonic  
Ballet at Marshall High School  
Local walking trips to Willamette River, Cottonwood Bay, Community Garden, Carruthers Park

### **Grades 3/4**

Recology Compost Center  
PCC Rock Creek Campus  
Oregon Historical Society  
Chief Lelooska Cultural Center  
Portland Walking Tour  
Willamette Jet Boat Tour  
Central Library (multiple trips)  
Local walking trips to Willamette River, Cottonwood Bay, Community Garden, Carruthers Park and Willamette Park

**Grades 5/6**

Northwest Children's Theater

Mt. Hood National Forest

Oxbow Regional Park

Oregon Historical Society

Black History Scavenger Hunt all over NW, N and NE Portland

National College of Natural Medicine (multiple trips)

Oregon Food Bank (multiple trips)

Oregon Children's Theater

Central Library (multiple visits)

OMSI's Camp Hancock

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

**Grades 7/8**

Oregon State House – Project Citizen

Portland City Hall

Magness Memorial Tree Farm

World Forestry Center

Japantown Walking Tour

Multi-day trip to Millersylvania State Park, WA with Wolf Camp

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

8<sup>th</sup> Grade Career internships (multi-day internships for 8<sup>th</sup> 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 Smarter Balanced test for Language Arts and Math and the OAKS Science test primarily during the weeks of April 20-May 8, 2015. As a school, we prioritized a portion of our auction funds to purchase 32 Chromebooks for use in the classrooms and for testing in the 2013/2014 school year. In 2014/2015, ODE supported additional Chromebook purchases to bring our total number of machines to 75. This enabled us to set up testing in classrooms. The advantages to this included:

- Students felt more comfortable testing in familiar space.
- Classrooms were quieter and less distracting settings than our previous testing location.
- Teachers were trained as test administrators (along with other SWCS staff) giving them first-hand exposure to the testing experience for students.
- Students experienced less disruption of other "specials" such as PE and art.
- We could test more than one classroom simultaneously which shortened the time the test impacted instruction from 6 weeks to 3.

Disadvantages included:

- Classrooms had to be cleared of any inappropriate testing materials.
- Teachers had to go through the full Test Administrator training which meant more time away from curriculum planning.
- The school incurred additional cost to the school to improve the internet & wireless infrastructure to accommodate the additional load.

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 13-24) in our smaller computer lab which houses just six computers.

Due to the controversy swirling around the SBAC test, we too had a handful of students opt-out of the testing this year. Our overall participation rate was 95.7% for the Language Arts and Math tests. For the Science test, 93.6% of our 5<sup>th</sup> and 8<sup>th</sup> graders participated.

To help inform parents about the new format of the test, we held a State Testing Parent Information Night in November 2014. All the information shared at that meeting was then emailed to our community for those who missed the meeting. We plan to have a similar meeting again this year, most likely in late winter.

**Table 5 – Summary of SWCS student performance on 2014/2015 Oregon State Assessments (Smarter Balance & OAKS) compared with the averages of PPS and the State.**

Test	% of SWCS Students on IEP (14/15)	SWCS % Achieving a Level 3 or 4 on SBAC/OAKS	SWCS Participation Rate	PPS % Achieving a Level 3 or 4 on SBAC/OAKS	PPS Participation Rate	Statewide % Achieving a Level 3 or 4 on SBAC/OAKS	Statewide Participation Rate
3 <sup>rd</sup> Grade (24)	20.8 (5)						
English Language Arts		54.5	91.7	56.6	89.2	45.6	97.0
Math		56.5	95.8	55.5	89.2	45.6	96.9
4 <sup>th</sup> Grade (23)	26 (6)						
English Language Arts		54.2	100	57.5	90.7	49	97.7
Math		41.7	100	52.0	90.3	43.7	97.5
5 <sup>th</sup> Grade (24)	12.5 (3)						
English Language Arts		47.8	95.8	61.6	90.7	53.6	97.5
Math		30.4	95.8	48.9	90.1	40.8	97.2
Science		82.6	95.8	67.3	91.1	65.5	98.0
6 <sup>th</sup> Grade (21)	9.5 (2)						
English Language Arts		55.0	100	60.4	89.8	52.7	97.2
Math		40.0	100	48.0	89.2	38.1	97.1
7 <sup>th</sup> Grade (24)	20.8 (5)						
English Language Arts		72.7	95.7	64.9	90.5	55.5	96.9
Math		57.1	91.3	52.5	89.4	42.6	96.6
8 <sup>th</sup> Grade (24)	4.2 (1)						
English Language Arts		90.5	91.3	61.3	88.0	57	96.2
Math		76.2	91.3	50.8	86.9	42.9	95.9
Science		85.7	91.3	64.8	88.6	63.5	90.5
Total (140)	15.7 (22)						
English Language Arts		62.1	95.7	60.4	89.8	52.2	97.1
Math		50.0	95.7	51.3	89.2	42.3	96.9
Science		84.1	93.6	66.1*	89.9*	64.5*	94.3*

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

## **National Assessment Scores**

No other national assessment tools were used comprehensively in 2014/2015.

## **Assessment Results Analysis**

In 2013/2014, we marked significant growth for most of our grades. However, this year, with the change in the test for English Language Arts and Math to the Smarter Balance test, we are essentially at a new base line. However, we can offer some comparison to both PPS (our local district) and the state as a whole.

When compared with other PPS schools and the state overall, SWCS again performed well. Our percentage reaching a level 3 or 4 on the ELA test was higher overall and significantly higher in grades 7 & 8. Compared with the state overall, our students reaching level 3 or 4 on the ELA test was higher than the state in all grades. In math, our students were higher overall than the state in the number of students achieving a level 3 or 4, and we were very close to, but slightly below, PPS's average. As in years past, science continues to be an area of strength with our students' scores exceeding both PPS and the state in both 5<sup>th</sup> and 8<sup>th</sup> grade.

Now having a year of experience with the new test, we look forward to helping our students improve their performance in both math and ELA next year.

## **Family Handbook**

The SWCS Family Handbook for 2014/2015 is located in Appendix F.

# Survey

## ODE Survey Results

The results from the ODE 2014/2015 student/parent/staff survey are located in Appendix G.

## Analysis & Plan of Action

### ODE Survey Staff Results Analysis (n=15)

On the ODE staff survey, all but three (95.3%) of the responses were between a 3 and 5 ("Strongly Agree") on the 5-point scale. Sixty-five percent (65%) Fifty-seven percent (57%) were between 4 and 5, and increase from the 57% that ranked between 4 and 5 in 2013/2014. The top scoring comments were:

- I feel learning can be fun
- My administrators treat me with respect
- I have the opportunity to think for myself, not just carry out instructions
- I believe student achievement can increase through:
  - Providing a threat-free environment
  - Close personal relationships between students and teachers
  - Addressing student learning styles
- I love seeing the results of my work with students
- I believe every student can learn
- I love to teach

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
- I work effectively with English learners
- We have an action plan in place which can get us to our vision
- Teachers in this school communicate with each other to make student learning consistent across grades

### 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.

### English Learners

We have not yet had any students designated as English Language Learners yet at our school. Hence our teachers have not had the opportunity to work with this population of learners.

### Action Plan

In January 2015, our Board met to develop a strategic plan for our school (see Appendix H). However, its implementation is in its infancy, and that was certainly true when the staff took this survey in May. We hope to see this score rise as more work is done on our long-term goals.

### Teacher Communication

We started to address this issue last year by having a three-day retreat in June to work exclusively on our curriculum. We have also made improvements here a priority this year by changing our daily structure so that teachers would have more time to communicate and plan during the school day together. We also have a full-time Academic Director this year to help facilitate more work with our curriculum to ensure its strength through the grades.

### **ODE Elementary Student Results Analysis (n=67)**

One of our goals last year was to increase our student response rate, and we did, more than doubling our elementary age response rate from 30 to 67. Happily, our K-5 students responding to the survey almost universally agreed or strongly agreed with all the survey statements. Only two responses dipped below the 4-point line:

- When I am at school, I feel I have choices in what I learn
- Students at my school treat me with respect

These concerns have been consistently low although this year they both moved closer to the 4-point line overall.

### **ODE Middle School Student Results Analysis (n=10)**

We only slightly increased the number of responses in the middle school this year from 8 to 10 responses. 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 one response was below the 4-point line:

- Students at my school treat me with respect

This prompt has provided volatile responses over the years. Last year, mutual student respect was ranked well above 4. The previous year, it was ranked below this year's score (around 3.5). We suspect that for middle school students, mutual respect between students is an issue that ebbs and flows daily given how their adolescent bodies are feeling on a given day. We work regularly in all our classes to help our students learn to show respect to all their peers and adults.

### **ODE Parent Results Analysis (n=125)**

We had a good increase in the number of respondents this year, up from 76 last year. Similar to 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 know what my child's teacher expects of my child
- Students show respect for other students
- I know how well my child is progressing in school
- Overall the school performs well academically
- The school succeeds in preparing children for future work
- 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. In 2013/2014, 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 moved to an electronic progress report system this year for the full school. Many parents struggled with the system (Synergy), which is the same system used by Portland Public Schools. Our teachers too have struggled with using this system which does not have a very intuitive user interface and often is slow or non-responsive during peak times of use. This year we will be looking at other possible student information systems to improve the situation for both teachers and parents.

# School Improvement

## Evaluation of Prior Year's Improvement Plan

Below are our goals for 2014/2015 and the progress made thus far:

### 1) **Increased academic rigor.**

We continued to find ways to increase the academic rigor for our students at SWCS. One of the ways that we did this was through an increase of Chromebook use by students in grades 5-8. Doing so pushed students to develop more "21<sup>st</sup> century skills" along with increasing their writing and research skills. *Singapore Math* is also helping to improve the rigor as students are stretched to develop math skills earlier and in a more comprehensive manner than they were with our previous curricula, *Bridges* and *Visual Math*. Additionally, almost all our students experienced more field work last year with the help of our new Field Work Coordinator position. By doing more work directly tied to our community, many students had an opportunity to see an increase in how their work tied to outside world.

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

Beginning in the 2013/2014 school year, we piloted the use of a web based grade book in one of our classes. In spite of low usage by parents, we moved to a school-wide electronic progress report system in 2014/2015 (Synergy). The system was not smooth and parents struggled to get signed in and to use the system effectively. In the 2015/2016 school year, we will be exploring the possibility of changing to another student information system with a better user interface.

### 3) **Improved compensation of staff.**

The Board met in January 2015 for it's first-ever retreat. One of the four primary goals identified for the school is teacher retention. Please see the next section for more information on this goal and sub-objectives.

### 4) **Improved administrative support of staff.**

In 2014/2015, we added two part-time administrative positions to support our teachers, a Field Work Coordinator and a Curriculum Coordinator. Both positions were great successes, and in the 2015/2016 school year, we have maintained the Field Work Coordinator position and moved the Curriculum Coordinator to the full-time position of Academic Director.

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

Our Field Work Coordinator has worked diligently on this goal this year and has succeeded in forming several new community partners. Each classroom has been nurturing a specific community partner this year, and often they are working with those partners multiple times during the year. Three notable partners worked with this year include:

- National College of Natural Medicine – Our 7/8 and 5/6 classes worked two garden plots that the NCNM offered for our use, and later in year we partnered with NCNM on a mural project that now surrounds their community garden space.
- Mirabella Retirement Community – Our Kindergarten and 1/2 classes visited multiple times to read with the seniors there. The entire school also created cards for all single residents for Valentine's Day.
- Portland Parks & Recreation – We worked with PPR employees in a number of parks and projects including Cottonwood Bay, Willamette Park and Oaks Bottom.

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

The Board did hold their retreat on January 2015. In advance of the retreat, Board members polled and interviewed staff and community members to gather input. The plan is included in Appendix H.

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

This goal is still a work in progress. We struggle to expend any marketing funds and instead look for inexpensive ways to inform people about our program. However, these inexpensive methods often translate into a high amount of staff time, also costly and a rare commodity. We will return to this goal in 2015/2016.

**8) Increase enrollment for 2014/2015 to fill our facility.**

We continue to run nearly full, but we still do have a few spots available. Each year, there are changes to where the spots are making it difficult to use any trend data to target marketing efforts. We will continue to work to increase our enrollment to capacity this year.

**9) Increase survey response rate.**

Our response rates improved on all three surveys this year. We made a much more concerted effort to get the responses with multiple reminders to parent and staff. This year, we also used our Chromebooks to have teachers administer the surveys to students. We would still like to see more middle school (7/8) students respond next year.

## Goals & Plans

The following are our goals and plans for 2015/2016:

First and foremost, the Board of Directors identified four primary strategic goals in their planning session in January 2015. These goals and their action items for the first year are:

- 1. Develop a sustainable funding model to support the following three goals.**
  - a. identify a funding model which increases giving base
  - b. advocate for charter school funding from state
- 2. Offer place-based education and create passion for SWCS both internally and externally**
  - a. create a curriculum map that includes place-based education (PBE) standards
  - b. develop an ongoing assessment of PBE implementation; community education outreach
  - c. maintain field work coordinator position
  - d. improve messaging of mission and PBE
  - e. support training and development of teachers in PBE
- 3. Attract and retain the most innovative, passionate and creative teachers**
  - a. create a personnel committee to:
  - b. collect and prioritize action items to foster faculty/staff retention
  - c. identify first year action items
- 4. House the school in a better or improved facility which supports the mission, value and needs of SWCS**
  - a. create a facility committee to conduct a needs assessment
  - b. choose locations for analysis
  - c. conduct an analysis of current facility and lease

The Board has created subcommittees for each of these goals that include Board members, staff and other community members. Work has already begun for all areas, but the Board did have to temporarily focus on the search for a new Executive Director over the summer of 2015. The full plan is located in Appendix H.

### **5. Increased academic rigor.**

We continue to work on this goal, and coupled with it, are goals to improve math instruction and achievement for our students.

### **6. Seek a new and/or improved student information system or grading system that improves the parents' connection to their students' learning.**

We are already actively exploring the options that might improve this home/school communication. We hope to have a new system in place by the 2016/2017 school year

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

The Board is already planning to have another retreat in winter 2016 to plan the next steps in achieving the strategic goals stated above.

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

We will continue to work on this goal this year again in an effort to improve the school's visibility to traditionally underrepresented groups and to the broader community.

# 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 6-12 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 – joined us in work parties dedicated to sprucing up the school
- Mirabella Portland – hosted 7/8 interns, 1/2 & K 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 2013, 2014 & 2015
- 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. We have also embarked on a more ambitious partnership with PPR which includes projects at Cottonwood Bay, Willamette Park, Oaks Bottom and Johnson Creek Nature Park.
- National College of Natural Medicine – NCNM offered our students to work two garden plots in their community garden. We then worked jointly with NCNM and a local artist to create a mural of medicinal plants to surround their community garden area.

- South Waterfront Farmer's Market – Partnered with them to have our annual fall “Block Party” in conjunction with the Farmer's Market.
- City Hall – Worked with 7/8 students on Project Citizen project
- 7/8 Internship Partners
  - Mirabella
  - Park Place – Senior Living
  - Johnson Creek Watershed Council
  - Gray's Landing – REACH
  - Courtyard at Mt. Tabor – Park
  - Tryon Creek State Park
  - Neighborhood House
  - American Red Cross
  - Montessori Children's House
  - Children's Book Bank
- Lift Urban Food Pantry- 1st/2nd class visited and volunteered to hand out food
- Whole Foods Grocery Store- gave tours to 1st/2nd grade classes, donated food to us to make sandwiches and donated to the needy through St Michael's Catholic Church
- Cascadia Wild- A wolverine tracker came in to speak to the 5th/6th graders about tracking and then later led a hike on Mt. Hood
- Backyard Habitat- 3rd/4th graders met with a representative to audit our schoolyard and work towards achieving qualification
- Know Your City- 5th/6th graders worked with this organization to create a comic book about the history of Portland's black community. Know Your City connected us with a professional comic book artist to teach the students, and the finished book is now on Know Your City's website.
- United States Citizenship and Immigration Services- 7th/8th graders worked with the USCIS to organize a Naturalization Ceremony for 10 new citizens, hosted by the students in our school
- Portland Department of Urban Forestry- 7th/8th graders completed a tree survey of the South Waterfront neighborhood to contribute to the Urban Forestry's database
- Additionally, over 280 vendors donated to our annual auction in support of SWCS

# Facilities

## Details/Overview

During the 2014/2015 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 including the following:

- Reconfigured office to accommodate administrative changes
- Added more storage/cabinetry in classrooms

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 continues to be 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 hand written and checked against deposit slips generated from the accounting system for verification and accuracy. 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 by check and electronic transfer. SWCS utilizes electronic transfers at month end (or mid-month as necessary) to move funds into the main account to cover expenses. Calculation of the amount needed made by the 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 secured 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. The list is updated to include key points as needed. Review 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 (typically Business Administrator) perform a combined 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.

- Following month end close, and prior to the Board meeting, the Business Administrator creates a specialized financial report. This report summarizes the profit and loss simplified by designated category, provides budget to actual, forecasts expenses for the remainder of the year and compares budgeted year end to forecasted year end based on current trends and expenditure changes. The SWCS Treasurer, or designated individual, reviews the special report, profit and loss and balance sheet for the month being reviewed. Notes are also provided with the report to explain changes and trends for clarification. The Treasurer, or designated individual, presents the information the Board at the monthly 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 must also be 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 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 tax withholding 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, and held in a secure location, 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 I.

### **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 Mary Anderson in Research, Evaluation and Assessment, who acts as our District Test Coordinator.

We continued to operate this year without funds from the Portland 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. We worked with City Hall during the 2014/2015 school year, along with our fellow State-sponsored charter school, Ivy Montessori, to get the tax reinstated. In summer 2015, PPS notified us that we were going to receive the funds for just the 2015/2016 school year. According to PPS this allotment is coming from their funds and will not extend past the 2015/2016 school year. As of the date of this report, no funds have been released to SWCS for this year's Art Tax allotment.

### **Federal Funds**

SWCS received no Federal funds in 2014/2015.

### **Contracts**

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