

SUBJECT

Legacy Charter School Annual Update

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5209(2)

BACKGROUND

Legacy Charter School (Legacy) is a public charter school authorized by the Public Charter School Commission (PCSC) and located in Nampa since 2011. Liberty serves approximately 260 students in grades K-8.

DISCUSSION

Legacy will provide an annual update on the status of the school.

Legacy's [Star Rating](#) for 2011-12 school year (the first year of operation) is 3 out of 5. The lowest scoring areas were those related to student growth in Reading and Language Arts. Legacy students made Adequate Growth in these areas, but the school received lower points because students' growth was less than ideal. The school met [AYP](#).

Based on self-reporting by the school, Legacy did not meet any of the four Measurable Student Educational Standards (MSES) outlined in their charter. MSES targets were set at 95% and although the students have strong academic results, actual performance did not reach this level.

Legacy has had a shift in their administrative structure in the past few months. The school opened with a co-administrator model, however, one of the administrators left the school in early fall 2012. The board does not intend to fill this position immediately, so Seth Stallcop has taken on the role of sole administrator.

The PCSC site visit revealed a strong replication of the Harbor Method model; students were actively engaged in learning, and there were no significant concerns identified by the PCSC staff member who conducted the visit.

The school's board is stable and has a strong vision for the school. While finances are tight, the board, administration, and clerk have a strong understanding of appropriate practices for budgeting and oversight.

IMPACT

Pursuant to I.C. §33-5209(2), if the PCSC "has reason to believe that the public charter school has done any of the following, it shall provide the public charter school written notice of the defect and provide a reasonable opportunity to cure the defect: ...(b) Failed to substantially meet any of the student educational standards identified in the approved charter..."

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends that the PCSC direct staff to issue to Legacy Charter School a notice of defect on the grounds of failure to substantially meet MSES 1, 2, 3 and 4 in the approved charter.

COMMISSION ACTION

A motion to direct PCSC staff to issue to Legacy Charter School a notice of defect on the grounds of failure to substantially meet any of the MSES in the approved charter.

Moved by _____ Seconded by _____ Carried yes _____ or no _____

**Idaho Public Charter School Commission
Site Visit Report**

School	Legacy Public Charter School
Address	4015 S. Legacy Way, Nampa, ID 83686
Date of Site Visit	September 27, 2012
PCSC Staff Present	Alison Henken, Charter Schools Program Manager
Board Member(s) Interviewed	Emily Criddle, Board Member
Administrator(s) Interviewed	Seth Stallcop, Principal
Business Manager / Clerk Interviewed	Niki Crow, Clerk
Other Stakeholder(s) Interviewed	None

Board Member(s) Interview

Emily Criddle took part in the interview. She has been on the board since the summer before the school opened, and demonstrated a strong understanding of the mission of the school to “provide a safe place for kids to be” so there is “low threat” and learning can take place. She spoke about the importance of students being academically challenged so they can be prepared for college and work. She feels that the current administration and staff at Legacy are excellent at carrying out the mission of the school, and as a result, the intended culture and actual culture are closely aligned. The principal and staff know the students by name and are approachable. She believes that students feel comfortable approaching teachers and administrators if they have a question or issue. Teachers ensure that students are learning challenging material and moving forward, while using the “if not today, then the next day” method of repeated instruction that is a key component of the Harbor method.

Mrs. Criddle believes that the principal has a strong relationship with the board, and she was able to easily delineate between the board's responsibilities of oversight and the principal's role of caring for the day to day operations. The administrator keeps the board informed and gives regular, informal reports (discussion-based, rather than written) regarding the school's academic performance. Mrs. Criddle described board meetings as orderly, organized, and focused, and feels that the board is strong and ready to handle issues the school may face. The board has done quite a few trainings in the past year, working closely with Rebecca Stallcop, the founder of the Harbor method, to ensure that they understand the method and have policies and procedures in place to ensure strong finances, operations, and academics.

Mrs. Criddle did not have any significant concerns about the school at this time. In discussing the current situation with administration (the co-administrator recently left the school), she said that the board was confident in Mr. Stallcop's abilities and was intending to move forward with him as the sole principal for the time being. She noted that ensuring that the school's finances are built and strong board's highest priority, particularly since the school recently moved into a new building. Developing and implementing policies that ensure sustainability have been a focus of the board's from its inception.

Administrator(s) Interview

Seth Stallcop, Principal, participated in the interview. The school is in its second year of operation, and Mr. Stallcop has been the administrator from the start. It is clear that he has a strong understanding of the school's mission and vision and a focus on ensuring that it is implemented well. During the formal interview, as well as during informal interactions, he spoke of creating a safe school environment where students can excel academically, be confident, competent thinkers, and ultimately, transition well from school to postsecondary education and/or work.

Mr. Stallcop demonstrated a clear understanding of the delineation of roles between the board and the administrator, stating that the board is the “sovereign entity” that provides oversight, and that his duty is to carry out their decisions and ensure effective operations day-to-day. He feels that his relationship with the board is professional and that the chain of command is clear. He believes that Legacy has an exceptional board whose members he respects, and that he feels supported by them.

According to Mr. Stallcop, Legacy measures its academic effectiveness through a variety of means; while standardized test scores are important, he was quick to clarify that they are not the only standard by which they gauge success. They also consider students’ performance on classroom assessments, feedback from teachers and parents, and regular classroom observations to ensure that not only are students performing well, but the school and teachers are staying true to the Harbor method. Mr. Stallcop believes that the teachers have a strong understanding of the approach and do it well, and indicated that he does not have any challenges with teachers, their performance, or his relationship with them. He enjoys supporting his staff and ensures that they know that he will continue to do so as long as they do things that are “supportable.”

In regards to the shift from being co-administrator to the sole principal, Mr. Stallcop expressed that the transition has been smooth and has had no significant, negative impact on him. He feels this is a testament to the strong people who work around him and to the organization and smoothness of operations that the school has. When asked about his sense of where the situation will go (ie. whether they will again have a co-administrator), he said that he trusts the board and leaves it to their discretion, but that he feels it is possible to be effective with one administrator doing the role 75% of the time (as he is currently doing).

Finally, Mr. Stallcop expressed no significant concerns for the future, stating that the school is based on a “tried and true method” that “works for us” and that he is confident that the board and staff will ensure the school is sustainable and strong in the long term.

Business Manager / Clerk Interview

Niki Crow, Clerk for Legacy and its Board of Directors, participated in the interview. She is confident in the financial situation of the school even though they recently moved into a new building, and anticipates that they will break even or potentially have small carryover when they conclude this year. She did mention that it was difficult for the school to lose their final year of the federal Charter Start-up grant, but that they weathered the storm well. They did have to use a line of credit during the 2011-2012 year because of cash flow issues, but it is already paid off.

Niki feels that the board and administration have a strong understanding of appropriate financial practices, and they budget conservatively (under-estimating revenue and over-estimating costs) to minimize financial surprises. Given the current economic landscape, she felt that Legacy’s ability to move into a new building this quickly after founding while maintaining solid finances is a testament to these practices. She has no concerns about Legacy’s finances at this time and is confident that the board and administration will continue to be diligent in the future.

Documents Review

Finances

The finances through the 2011-2012 year and 2012-2013 year-to-date were reviewed. Questions were answered by Niki Crow, who clearly has a strong grasp on financial situation at Legacy. The finances and accounting practices appear to be in order and there are no concerns at this time.

Special Education Files

Three (3) special education files were selected at random for review. The files were all well-organized, with strong documentation. All IEPs were up-to-date, IEP goals were appropriate, and accommodations pages were completed and included. The student who was initially assessed at Legacy was tested by a school psychologist with appropriate instruments; initial eligibility documentation and testing instruments were included in the file. For students initially assessed before attending Legacy (2), eligibility documentation was received from the previous school district and included in the file. It was clear that Legacy communicates well not only with other school districts, but also with outside providers; one of the files had documentation showing regular communication and interaction with an outside agency providing occupational therapy services. All files also revealed that Legacy has regular communication with parents. Erica Gerber is the Director of Special Education at Legacy; it is clear that she is diligent in ensuring that students receive the assistance they need and that all documentation is done completely and correctly. At this time, there are no concerns about the files reviewed or special education programming.

Classroom Observations

Classroom observations revealed that the mission of the school and the Harbor method are consistently implemented by teachers. Students were seen doing chorale learning, moving between topics and spaces quickly, and demonstrating knowledge above typical grade-level expectations. Teachers did an excellent job of engaging students, and there were no behavioral challenges observed.

Special education students were observed, both in the regular classroom setting and in pull-out services. These students seemed to be doing well; they were actively participating in the classroom and had appropriate, positive learning interactions with instructors during their pull-out time.

The staff member who conducted the site visit was very impressed with all observations, particularly since all were done without an administrator present and the majority of teachers were not previously informed.

Summary

Strengths

- Strong Academics (above grade-level content; ACT/SAT vocabulary taught as early as elementary in a fun way; Spanish for all students beginning in 2nd grade; built-in college prep content for high school students; concurrent enrollment courses for high schoolers)
- Engaged Students
- Solid financial practices and clear understanding of the importance of close fiscal oversight by the board and administration to ensure strong finances now that they have moved into their new building
- Consistently strong teaching
- Understanding by both board and administrators of the appropriate division of roles
- Good relationship between board and administration
- Board has a strong understanding of the Harbor method and the financial practices and is working on policies to ensure sustainability

December 4, 2012

Challenges or Areas for Improvement

- MSES are outdated, even though they are new, since they don't include any references to the star-ratings system or growth model.

Concerns

The PCSC staff member who conducted the visit has no significant concerns about Legacy Public Charter School at this time.

Possible Charter Violations

There are no apparent charter violations at this time.

Possible Charter Amendments

- Updated MSES using STAR data is a potential future amendment (Identified by PCSC staff, not the Legacy staff or board)

Recommendations

- PCSC staff recommends that the charter be amended to update MSES to be aligned with the ID Five-Star Rating System
- PCSC staff recommends that the administrator, clerk, and board all remain diligent in monitoring their finances to give them the best possible chance of ending the year with a carryover

* Please Note: PCSC staff member sent this recommendation, along with praise for the many things the school is doing well, in a follow-up e-mail to the school.

Materials or Follow-up Requested of the School

Nothing additional was requested of the school.

December 4, 2012

CHARTER SCHOOL DASHBOARD

Date: 10-29-2012

School Name: Legacy Public Charter School

School Address: 4015 S. Legacy Way, Nampa, ID 83686

School Phone: 208-467-0948

Current School Year: 2011-2012/2012-2013

School Mission: Legacy's mission is to develop students who are competent, confident, productive and responsible young adults who possess the habits, skills and attitudes to succeed in high school and to be offered the invitation of a post-secondary education, satisfying employment, and life-long opportunities

CHARTER SCHOOL BOARD

Board Member Name	Office and Term	Skill Set(s)	Email	Phone
Bart McKnight	Chairman	Business, Harbor founder & former Harbor school board member, 2014	bmcknight.legacycharterschool@gmail.com	208-989-3296
Shelia Bryant	Vice Chair	Legal, Harbor founder & Harbor school board member 2013	sbryant.legacycharterschool@gmail.com	208-880-7499
Christine Ivie	Member	Education, Parent 2015	civie.legacycharterschool@gmail.com	208-871-7749
Emily Criddle	Secretary/Treasurer	Parent, Volunteer 2013	ecriddle.legacycharterschool@gmail.com	208-466-2737
Danny Bower	Member	Attorney 2015	dbower.legacycharterschool@gmail.com	208-899-4156
Niki Crow	Clerk	Financial	schoolclerk32@gmail.com	208-571-2936

ENROLLMENT

Grade Level	Current Enrollment	Current ADA	Current Waiting List	Previous Year's Enrollment	Previous Year's ADA
K	24	98.10	113	25	99.3
1	28	95.04	112	28	97.3
2	30	97.82	82	30	97.75
3	30	98.91	44	30	98.21
4	33	98.63	21	33	98.22

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5	33	98.05	46	33	98.98
6	33	99.06	49	33	97.25
7	31	97.20	1	16	97.93
8	19	96.56	10	17	96.70
9	na	na	na	na	na
10	na	na	na	na	na
11	na	na	na	na	na
12	na	na	na	na	na
TOTAL	261	97.70%	478	245	97.96%

Student Attrition Rate: 8% (2011-2012)

Is your school planning to increase or decrease enrollment opportunities for the upcoming school year? Increase
If yes, briefly describe planned enrollment changes, including numbers and grades affected: Continue to move toward separate, 7th and 8th grades that will each have 50 students in a 35/7th, 35/8th, 30/Harbor Room mixed-grade configuration.

STUDENT DEMOGRAPHICS

School Year	Hispanic (# and %)	Asian (# and %)	White (# and %)	Black (# and %)	American Indian (# and %)	LEP (# and %)	FRL (# and %)	Special Education (# and %)
Current	16/6.1%	7/2.6%	235/90.38%	2/.7%	0	0	87/34.2%	23/8.8%
Previous	18/7.3%	12/4.9%	214/87%	2/.8%	0	0	90/41%	17/7%

FACULTY AND STAFF

Administrator Name(s): Seth Stallcop
Administrator's Hire Date: 7/1/2011
Administrator Email(s): admin@legacycharterschool.net
Current Classified Staff (# FTE): 6
Classified Attrition Rate: 0
Current Faculty (# FTE): 10
Faculty Attrition Rate: 5% (1, half-time teaching position)

EDUCATIONAL PROGRAM

Did your school make AYP during the last school year? Yes
If no, please specify indicator and status: N/A
If no, please describe plan for addressing need: N/A
Was your school selected to participate in NAEP this year? Yes (for 2012-2013)

REPORTING

Date of last programmatic operations audit? July 25, 2012
Date submitted to authorizer? Oct. 10, 2012
Who performed your most recent programmatic audit? Community members Holland Johnson and Brianne Gray
Date of most recent fiscal audit? July 31, 2012
Date submitted to authorizer? August 20, 2012

COMMENTS

Please describe any significant changes experienced by your school in the past year:

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Since 2011-2012 was our first year in operation, the entire year was a series of changes and adjustments while replicating the successful Harbor Method educational program and constructing the permanent facility.

Please describe the greatest successes experienced by your school in the past year:

We were glad to complete the first year with our students making AYP, with parents showing a high degree of satisfaction, with strong retention going into this second year (enrollment up 16 students) and the waiting list continuing to grow. We appreciated approval of the Harbor Room amendment by the Commission which, we believe, played a positive role in retaining and attracting students to the 7th grade (up from 16 last year to 31 students currently). Of special importance to us was being able to construct the permanent facility safely while adjacent to the temporary buildings and all the student activity occurring just steps away while on budget and on time so that it opened this fall as scheduled.

Please describe any challenges you anticipate during the upcoming year:

Not so much a challenge as a strong awareness & desire to move Legacy from its 3-STAR rating this past year to a 4- or 5-STAR rating. As we study the rating, it appears the "3" is a result of not being able to show adequate growth in student achievement, which is understandable at this point since the school has just one year's worth of data from which to draw. We are working with the SDE folks closely to understand, monitor, and achieve a higher STAR rating and we are hoping this can happen this year, or no later than the following year. We also anticipate needing to amend our charter to include the STAR rating growth as part of the measurable student educational standards.

Please add any additional information of which you would like to make your authorizer aware :

We want to add that the Legacy Board and Administrator have been working with Harbor Founder Rebecca Stallcop closely to continue to ensure that Legacy is a true replicate of the Method that has been so successful in educating Idaho students. We particularly want to share that the financial picture for the school, while still tight, is stronger, with a positive balance w/a reserve at the end of this year, and a projected almost doubling of the reserve the following year.

REQUIRED ATTACHMENTS

- Most recent ISAT, IRI, DWA, and DMA results (as applicable)
- Chart comparing ISAT, IRI, DWA, and DMA scores over the past four years of operation (as applicable)
- Goals attainment report comparing the measurable student educational standards in your charter to actual results.
- Written response to recommendations from most recent programmatic operations audit.
- Most recent parent/stakeholder satisfaction survey results
- Budget actuals for most recent month-end
- Budget estimates for remainder of current year, and fiscal outlook for next year

Goals Attainment Report Comparing Charter’s Measurable Student Educational Standards to Actual Results

Legacy’s MSES take effect once students have been enrolled at least three, consecutive years. These initial-year outcomes provided valuable baseline information from which to plan in order to move students forward.

From Legacy’s charter:

A. Measurable Student Educational Standards I.C. 33-5205 (3)(b)

The goal Legacy Public Charter School will constantly strive for and expect is that 100% of our students will exceed the minimum passing requirements on all state-mandated testing and other testing that may be instituted or required in the future. Students who have been enrolled at the school for three consecutive years will meet the following educational standards:

- 1. 95% of kindergarteners, 1st, 2nd, and 3rd graders will be at “Benchmark” or a combination of “Benchmark” and “Strategic” on the Idaho Reading Indicator (IRI).**

2011-2012 IRI results:

Grade/Indicator	Fall	Fall	Spring	Spring
	#	%	#	%
K: Benchmark	14	63.64%	20	83.33%
Strategic	6	27.27%	2	8.33%
Intensive	2	9.09%	2	8.33%
1 st : Benchmark	16	57.14%	24	85.71%
Strategic	9	32.14%	2	7.14%
Intensive	3	10.71%	2	7.14%
2 nd : Benchmark	23	76.67%	30	93.75%
Strategic	4	13.33%	0	0
Intensive	3	10.00%	2	6.25%
3 rd : Benchmark	22	78.57%	28	93.33%
Strategic	5	17.86%	1	3.33%
Intensive	1	3.57%	1	3.33%

Fall 2012 IRI results:

Grade/Indicator	Fall #	Fall %
K: Benchmark	16	66.66%
Strategic	7	29.10%
Intensive	1	.416%
1 st : Benchmark	25	89.28%
Strategic	0	0
Intensive	3	10.71%
2 nd : Benchmark	21	70.00%
Strategic	6	20.00%
Intensive	3	10.00%
3 rd : Benchmark	26	86.20%
Strategic	1	.34%
Intensive	3	10.00%

Goals Attainment Report/MSES, continued:

2. 95% of 5th & 7th graders will score a “3.0” or better on the Direct Writing Assessment.

2011-2012:

5th grade: 59% scored “3” or better.

7th grade: 37% scored “3” or better.

3. 95% of 4th, 6th, and 8th graders will score a “3.0” or better on the Direct Math Assessment.

2011-2012:

4th grade: 75% scored a “3” or better.

6th grade: Scores unavailable (6th grade teacher provided scores to 7th/8th math teacher at end of school year for 2012-2013 planning. Math teacher left school in fall 2012; data not found.)

8th grade: Scores unavailable (Math teacher left school in fall 2012; data not found.)

4. 95% of 3rd, 4th, 6th, 7th and 8th graders will achieve “Proficient” and/or “Advanced” in each area, as applicable, on the Idaho Standards Achievement Test.

2011-2012 Opening year ISAT Proficiency/Advanced results:

Grade	Reading	Math	Language	Science
3rd	83.4%	96.7%	90%	n/a
4th	97%	93.9%	90.1%	n/a
5th	84.9%	84.9%	78.8%	63.70%
6th	87.8%	84.8%	72.7%	n/a
7th	88.2%	88.3%	82.3%	70.60%
8th	100%	75%	62.5%	n/a

LEGACY PUBLIC CHARTER SCHOOL
2012 ISAT & AYP/STAR COMPARISONS (Expressed in %)

ISAT:

READING Proficiency	State	Nampa School District	Victory Charter School	LEGACY CHARTER	Liberty Charter School
3 rd Grade	88.40	83.00	100	83.40%	93.40
4 th Grade	88.90	85.40	100	97.00%	90.90
5 th Grade	87.80	83.10	100	84.90%	90.90
6 th Grade	89.50	85.90	87.90	87.80%	88.50
7 th Grade	90.80	88.30	97.10	88.20%	100
8 th Grade	92.30	88.70	97.10	100%	96.90
MATH Proficiency	State	Nampa School District	Victory Charter School	LEGACY CHARTER	Liberty Charter School
3 rd Grade	88.40	85.80	96.60	96.70	96.70
4 th Grade	86.80	84.30	96.90	93.90	87.90
5 th Grade	78.60	74.60	93.90	84.90	93.90
6 th Grade	79.00	72.80	81.80	84.80	91.40
7 th Grade	75.60	70.80	94.10	88.30	97.00
8 th Grade	78.80	72.60	82.90	75.00	96.90
SCIENCE Proficiency	State	Nampa School District	Victory Charter School	LEGACY CHARTER	Liberty Charter School
5 th Grade	69.30	65.20	87.90	63.70	78.80
7 th Grade	59.40	57.10	70.60	70.60	76.50
LANGUAGE Proficiency	State	Nampa School District	Victory Charter School	LEGACY CHARTER	Liberty Charter School
3 rd Grade	74.60	68.70	96.60	90.00	86.70
4 th Grade	84.80	80.30	93.70	90.09	90.90
5 th Grade	79.40	73.60	93.90	78.80	87.90
6 th Grade	76.50	72.30	81.90	72.70	82.90
7 th Grade	74.20	66.60	82.40	82.30	97.10
8 th Grade	72.80	63.10	88.60	62.50	93.70

AYP/Star Rating: 2011-2012

	Victory Charter School	LEGACY CHARTER	Liberty Charter School
ISAT Reading	95.90 (Grades 3-10)	92.6% (Grades 3-8)	96.10 (Grades 3-10)
ISAT Math	96.50 (Grades 3-10)	92.3% (Grades 3-8)	95.10 (Grades 3-10)
ISAT Language	92.20 (Graduation)	86.8% (Grades 3-8)	100 (Graduation)
AYP Met	Yes	Yes	Yes
Star Rating	4	3	4

2011-2012 Parent/Stakeholder Survey Results

Two, parent/stakeholder surveys were conducted. The first survey assessed parent interest in the Harbor Room and class size increase charter amendments, which were approved by the Commission last winter. The second survey was conducted to gauge parent understanding of Legacy's responsibilities as a Title IA school, and to gather input regarding first-year challenges.

Survey #1: Harbor Room and Class Size Survey

1. I believe the addition of the Harbor Room to Legacy's academic program will benefit our 7th & 8th grade students and parents. [102 respondents]
Agree = 76 Somewhat Agree = 12 Disagree = 14
2. I believe the Harbor Room addition will help prepare our 7th & 8th grade students and parents for high school where online learning is now mandated by the state legislature. [105 respondents]
Agree = 83 Somewhat Agree = 9 Disagree = 13
3. I agree with the Governing Board's plan to request a charter amendment to increase 7th & 8th grade class sizes each by 14 as well as 2 students per class in grades K-6 (ALL 7th/8th students will utilize the Harbor Room on a rotating basis). [99 respondents]
Agree = 64 Somewhat Agree = 19 Disagree = 16
4. I support the Harbor Room charter amendment and class size change amendment to the Idaho Public Charter School Commission. [99 respondents]
Agree = 67 Somewhat Agree = 17 Disagree = 15

Overall in agreement: 72%

Overall in agreement/somewhat in agreement: 86%

Overall in disagreement: 14%

Q1 agree: 75%

Q1 agree/somewhat agree: 86%

Q1 disagree: 14%

Q2 agree: 79%

Q2 agree/somewhat agree: 88%

Q2 disagree: 12%

Q3 agree: 65%

Q3 agree/somewhat agree: 84%

Q3 disagree: 16%

Q4 agree: 68%

Q4 agree/somewhat agree: 85%

Q4 disagree: 15%

Survey #2: Title IA and First-Year Challenges

Total Surveys Returned: 92

1. Were you given a Parent/Student/Teacher compact?
Yes: 75 No: 5 Unsure/N-A/IDK/Can't remember: 11
2. Does your child receive sufficient help from a volunteer, EA, or teacher when necessary?
Yes: 80 No: 3 Unsure/NoAnswer/IDK/Can't remember: 9
3. Are you aware that families under certain income levels may qualify for free or reduced lunches?
Yes: 91 No: 1 Unsure/NoAnswer/IDK/Can't remember: 0
4. Do you feel Legacy uses funding resources to increase student achievement?
Yes: 82 No: 0 Unsure/NoAnswer/IDK/Can't remember: 10

From what you have seen and experienced, what do you see as the biggest challenges for our school? (open-ended question)

- Facility/Space/Parking/Permanent building completed on time: 11
- Desire for growth thru 12th grade/high school, room for all who want to come: 5
- Communication: 6 (timeliness, consistency)
- Ability to be able to maintain high academic standards: 2
- Offering of extra-curriculars: 3
- Larger class sizes: 1
- Funding: 1
- Upgrading textbooks: 1
- More buses: 1
- Appropriate Discipline: 2
- Lunch Program: 2

December 4, 2012

CURRENT FISCAL YEAR BUDGET COMPARISON

Legacy Charter School November 5, 2012	Proposed (Board Approved Budget for Fiscal Year)	Actual (Through Most Recent Month End)	Projected (Anticipated Year- End Numbers)	Percentage Used (Actual / Proposed)	Notes
REVENUE		9/30/2012			
Salary Apportionment	\$702,793.00	\$464,674.00	\$702,793.00	66.12%	
Benefit Apportionment	\$125,967.00		\$125,967.00	0.00%	
Entitlement	\$283,372.00		\$283,372.00	0.00%	Based on enrollment of 266. 14.38 Support Units.
State Transportation	\$66,000.00		\$66,000.00	0.00%	
Lottery				#DIV/0!	
Other State Funds (Specify)	\$16,025.00	\$3,545.00	\$16,025.00	22.12%	Technology, IRI, Gifted & Talented
Special Ed - Regular	\$36,966.00		\$36,966.00	0.00%	
Special Ed - ARRA				#DIV/0!	
Title I	\$56,299.00		\$56,299.00	0.00%	
Federal Title I Funds : ARRA				#DIV/0!	
Medicaid Reimbursement				#DIV/0!	
Title IIA	\$6,000.00		\$6,000.00	0.00%	
Local Revenue (Specify)				#DIV/0!	
Federal Startup Grant				#DIV/0!	
Other Grants (Specify)				#DIV/0!	
Fundraising				#DIV/0!	
Interest Earned	\$100.00		\$100.00	0.00%	
Other (Specify)	\$6,740.00	\$338.58	\$6,740.00	5.02%	Medicaid & Misc.
Other (Specify)				#DIV/0!	
TOTAL REVENUE	\$1,300,262.00	\$468,557.58	\$1,300,262.00	36.04%	
EXPENDITURES					
100 Salaries					
Teachers	\$435,414.00	\$123,499.83	\$435,414.00	28.36%	
Special Education	\$34,150.00	\$7,640.03	\$34,150.00	22.37%	
Instructional Aides	\$143,573.00	\$23,078.57	\$143,573.00	16.07%	
Classified/Office	\$25,000.00	\$4,166.66	\$25,000.00	16.67%	
Administration	\$80,000.00	\$19,636.45	\$49,636.00	24.55%	Reduced due to a change in administration.
Maintenance	\$4,650.00	\$500.00	\$4,650.00	10.75%	
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Total Salaries	\$722,787.00	\$178,521.54	\$692,423.00	24.70%	
200 Employee Benefits					
PERSI/FICA/Benefits	\$181,607.00	\$43,867.46	\$176,141.48	24.16%	
Other (Specify)	\$4,000.00	\$3,886.00	\$4,000.00	97.15%	Worker's Comp
Total Benefits	\$185,607.00	\$47,753.46	\$180,141.48	25.73%	
300 Purchased Services					
Management Services				#DIV/0!	
Staff Dev/Title IIA				#DIV/0!	
Legal Pub/Advertising	\$1,000.00		\$1,000.00	0.00%	
Legal Services				#DIV/0!	
Special Education	\$8,740.00	\$2,532.71	\$8,740.00	28.98%	
Liability & Property Ins	\$12,000.00	\$10,813.00	\$11,000.00	90.11%	
Substitute Teachers	\$2,000.00	\$90.00	\$2,000.00	4.50%	
Board Expenses	\$5,000.00	\$3,750.00	\$5,000.00	75.00%	Audit
Computer Services				#DIV/0!	
Transportation	\$88,500.00	\$5,856.00	\$88,500.00	6.62%	
Travel				#DIV/0!	
Other (Specify)	\$6,000.00	\$1,662.40	\$6,000.00	27.71%	Contracted Services
Other (Specify)	\$2,450.00	\$4,017.12	\$6,000.00	163.96%	Bank Service Charges, Dues & Fees
Total Services	\$125,690.00	\$28,721.23	\$128,240.00	22.85%	
Facilities					
Building Lease	\$0.00			#DIV/0!	
Land Lease				#DIV/0!	
Modular Lease	\$29,033.00	\$26,704.65	\$26,705.00	91.98%	
Utilities, Phones, Lndscp	\$33,420.00	\$1,008.48	\$33,420.00	0.27%	

December 4, 2012

CURRENT FISCAL YEAR BUDGET COMPARISON

Site Preparation				#DIV/0!	
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Total Facilities	\$62,453.00	\$27,713.13	\$60,125.00	44.37%	
400 Supplies and Maintenance					
Textbooks				#DIV/0!	
School Supplies	\$12,000.00	\$9,791.65	\$15,000.00	81.60%	Textbooks & supplies purchased with Startup Grant last year and this year.
Power School				#DIV/0!	
Custodial Supplies	\$0.00		\$0.00	#VALUE!	
Other (Specify)	\$3,000.00		\$3,000.00	0.00%	Grounds
Other (Specify)	\$500.00	\$11.51	\$500.00	2.30%	Building Maintenance
Total Supplies	\$15,500.00	\$9,803.16	\$18,500.00	63.25%	
500 Capital Objects					
Furniture				#DIV/0!	
Technical AV Equipment	\$22,226.00	\$16,515.64	\$20,000.00	74.31%	
Other (Specify)			\$10,000.00	#DIV/0!	Alarm System
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Total Capital Objects	\$22,226.00	\$16,515.64	\$30,000.00	74.31%	
Debt Service					
Specify	\$128,000.00	\$206.36	\$84,338.00	0.16%	Loan payments. Legacy is currently in the process of going out to bond for building financing. This will change our loan payments for the year.
Specify	\$0.00	\$0.00		#DIV/0!	
Specify				#DIV/0!	
Total Debt Service	\$128,000.00	\$206.36	\$84,338.00	0.16%	
Grant Purchases					
Specify				#DIV/0!	
Specify	\$3,500.00		\$3,500.00	0.00%	Title I Supplies
Specify				#DIV/0!	
Specify	\$200.00	\$10.59	\$200.00	5.30%	Title VI-B Supplies
Specify				#DIV/0!	
Total Grant Purchases	\$3,700.00	\$10.59	\$3,700.00	0.29%	
Reserve Fund				#DIV/0!	
Building Fund				#DIV/0!	
Total Expenses	\$1,265,963.00	\$309,245.11	\$1,197,467.48	24.43%	
Carryover from Previous FY	(\$69,633.00)	(\$69,633.00)	(\$69,633.00)	100.00%	
Reserve/(Deficit)	(\$35,334.00)	\$89,679.47	\$33,161.52	-253.81%	

December 4, 2012

UPCOMING FISCAL YEAR BUDGET COMPARISON

Legacy Charter School November 5, 2012	Proposed Budget	Notes
REVENUE		
Local Revenue	\$100.00	
State Revenue		
Entitlement	\$301,501.80	Based on enrollemnt of 279. Support units = 15.3.
Wages	\$753,129.92	
Administration		
Teachers		
Classified		
Medicaid	\$6,740.00	
Benefit	\$132,905.28	
Transportation	\$66,000.00	
Federal Revenue		
Title I	\$56,299.00	
Special Ed	\$60,000.00	
Title II	\$6,000.00	
Startup Grant		
Other Sources (Specify)	\$16,025.00	Technology, IRI, Gifted & Talented
Other Sources (Specify)		
Other Sources (Specify)		
Total Revenue before holdback	\$1,398,701.00	
PROPOSED HOLDBACK		
		Holdbacks should be estimated at a minimum of 5% - 5.5% for FY 2011.
Teacher Salaries		
Classified Salaries		
Admin Salaries		
Benefits		
Entitlement		
Transportation		
Total Holdback	\$0.00	
Total Revenue after holdback	\$1,398,701.00	
EXPENDITURES		
100 Salaries		
Teachers	\$505,000.00	
Admin	\$40,000.00	
Classified	\$173,223.00	
Special education	\$50,000.00	
Other (Specify)		
Other (Specify)		
Total Salaries	\$768,223.00	
200 Benefits		
Benefit Dollars		
PERSI/Payroll taxes	\$198,300.00	
Other (Specify)	\$5,000.00	Worker's Comp.
Total Benefits	\$203,300.00	
300 Purchased Services		
Transportation	\$88,500.00	
Special Education	\$8,740.00	
Proctor costs		
Legal	\$2,500.00	
Insurance	\$15,000.00	
Copier Lease	\$6,000.00	
Printer Lease		
Facility Lease		
Utilities	\$32,000.00	
Professional Development		
Technology	\$18,500.00	
Management Services		
Legal Publications/Advertising	\$1,000.00	

December 4, 2012

UPCOMING FISCAL YEAR BUDGET COMPARISON

Substitute Teachers	\$2,500.00	
Board Expenses	\$5,200.00	Audit
Other (Specify)	\$6,500.00	Bank Service Charges, Dues & Fees
Other (Specify)		
Total Purchased Services	\$186,440.00	
Supplies & Materials		
Teacher/Classroom	\$21,000.00	
Office		
Janitorial	\$4,000.00	
Textbooks		
Other (Specify)	\$5,500.00	Maintenance
Other (Specify)		
Total Supplies & Materials	\$30,500.00	
Grant Expenditures		
Specify	\$3,500.00	Title I Supplies
Specify	\$1,000.00	Title IV-B Supplies
Specify		
Total Grant Expenditures	\$4,500.00	
Capital Outlay		
Total Capital Outlay		
Debt Retirement		
Total Debt Retirement	\$168,675.00	Building payments.
Insurance & Judgements		
Total Insurance & Judgements	\$0.00	
Transfers		
Total Transfers	\$0.00	
Contingency Reserve		
Building Fund	\$0.00	
Total Expenditures	\$1,361,638.00	
Carryover from Previous FY	\$33,161.52	Reflects projected reserve/(deficit) from "current year" worksheet
Reserve/(Deficit)	\$70,224.52	