



## **2018-2019 Annual Report**

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# Mission & Overview

Wasatch Charter School is a K-8 tuition-free charter school in the Salt Lake Valley guided by the principles of public Waldorf education that provides a comprehensive education program integrating academics, arts, movement, nature, and social responsibility into everyday learning. Through a culture of holistic learning and dedication to the optimal development of each individual child, WCS nurtures intellectual, social and emotional, and physical capacities through an artistic, hands-on, interdisciplinary approach to core academic subjects which enables each student to blossom into an imaginative, engaged, competent, life-long learner. Our students, teachers, faculty, and families emerge as confident, creative, strong critical thinkers and environmental stewards, empowered to act positively in their own lives and communities.

## OVERVIEW

Over the 2018-19 school year, Wasatch Charter School began to settle in meaningful ways. We opened the KinderHouse for our preschool and kindergarten classes. We secured a formal lease on the farm land and launched our CSA. We saw very little staffing or student turnover, deepening our sense of community. We expanded our student services offerings, using No Blame Meetings and Restorative Practices to work with students having social, emotional or behavioral struggles, and increasing our staffing in special education. Our festivals and events became more formed and rhythmic and brought in even more revenue.

Students made demonstrable growth in academics, social and emotional awareness, physical capacities and artistic abilities. We exceeded financial objectives and dramatically increased support for our school. Most important, overall, we began to see the beginning fruits of seeds that had been planted early on as daily children learned and grew together within a supportive nurturing community. We also witnessed how learning and growing in our Waldorf community transferred into strengthening families and parents.

It was a joy to see all that emerged in year three with the promise of more opportunities in the future.

*Emily Merchant*  
Executive Director

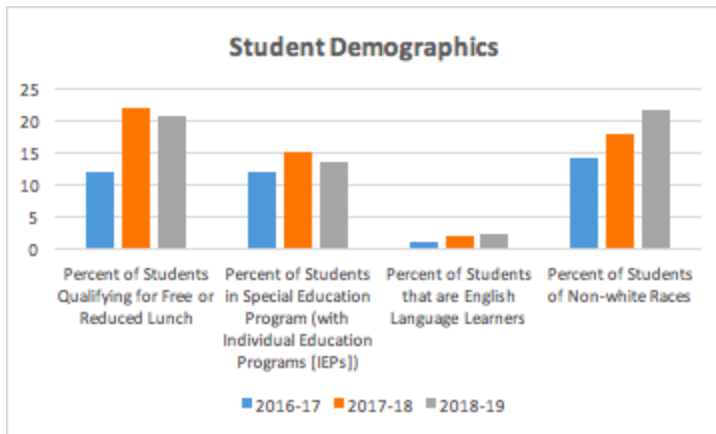
# 2018-19 Key Accomplishments

- ★ Increased enrollment to 640 Students.
- ★ Opened Kinder House to provide a beautiful, permanent home for our Early Childhood program.
- ★ Launched CSA as we began working the farm land through our gardening program and the Salt Lake County Urban Farming program.
- ★ Implemented more of the Three Care Streams approach to working with students: No Blame Meetings and Restorative Practices were embedded throughout the school.
- ★ Received an Innovative Student Improvement Program grant to support more fully developing a model for our SPED program's "Little Classes."
- ★ Improved implementation of academic interventions, particularly in lower grades reading and upper grades math.
- ★ Dramatically increased Family Council participation.
- ★ Graduated second cohort of teachers graduated from Gradalis, Waldorf teacher training.
- ★ Very high student and staff retention both within the year and from year 3 to year 4.
- ★ Academic growth and progress was made across all grades as measured by internal and state assessment metrics.
- ★ Fundraising engagement and revenue generated increased.
- ★ Governing Board leadership stabilized, Director and Board Evaluations were implemented, Policy Review was more timely.

# Our Community

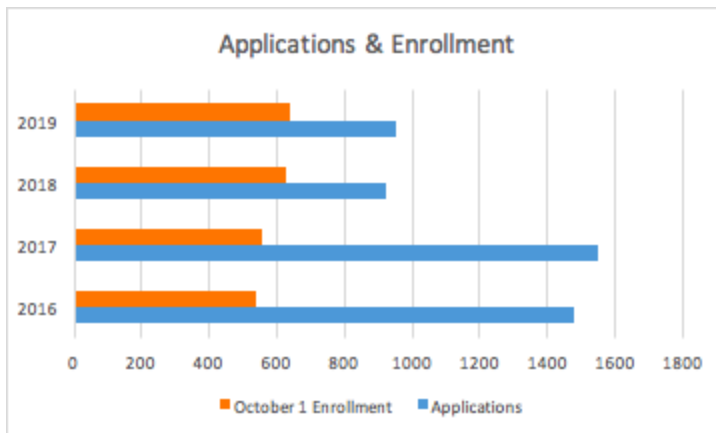
## Demographics

In our third year, WCS saw an increase in the number of minority students (17% to 21%), special education students, English language learners, and economically disadvantaged students, all remained very close to the previous year, as demonstrated below.



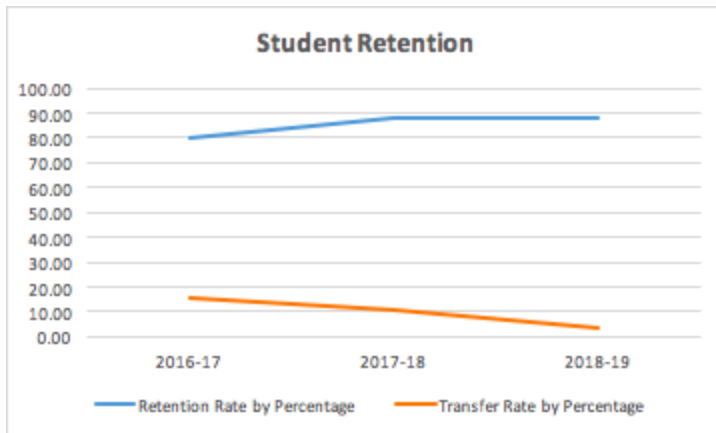
## Enrollment

WCS maintained consistent interest in enrollment, once again fully enrolling to our maximum and maintaining sizeable waiting lists throughout the year.



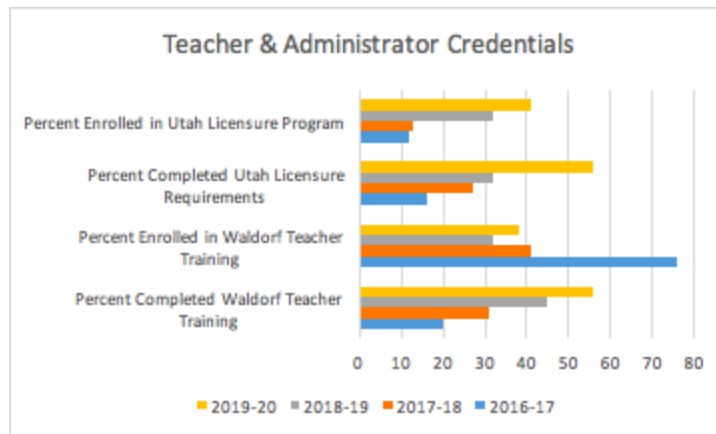
## Retention

WCS significantly increased year to year student retention from October 1 of 2017 to October 1 of 2018 with a total retention of 88%, over our first year's 81%. In 2018-19, the school increased retention slightly at 88.4%, continuing to out-perform the State average for charter schools which is 81%. The within year transfer rate (the number of students who withdraw *during* the school year) also dropped significantly. The first year was 16%, second year 11%, and year three was 3.5%, well below the average for all charter schools (8.6%).



## Employee Qualifications & Training

A second cohort of teachers completed Waldorf training in the summer prior to the 2018-19 school year, and many teachers began or continued training programs as well. A significant increase occurred in the number of teachers with Utah teaching licenses, as well as those involved in a licensure training program.



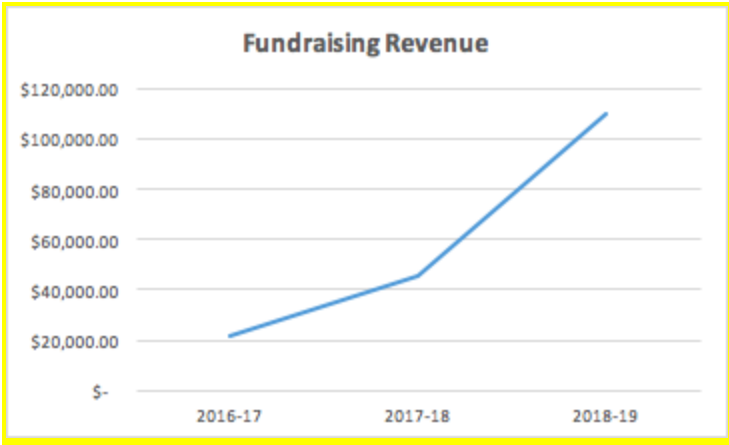
## Employee Retention

WCS had very strong employee and teacher retention in 2018-19, both compared to the previous year, and also in comparison to Utah state averages. According to a report “Teacher Turnover in Utah Between 2013-14 and 2014-15, 31% of teachers at charter schools turnover each year and 18% of teachers at traditional public schools. From 2018-19, WCS’s teacher turnover was only 7%, almost identical to the previous year’s 6%. Similarly, retention for part-time employees was maintained at 79% compared the the previous year’s 80%.



## Fundraising

WCS had significant community investment in our programs and mission, with increased revenue from fundraising being one result. Fundraising activities and approaches were clarified and systematized throughout the year in order to support long-term approaches and successful events and campaigns that will be sustained from year-to-year. Our first year raised just under \$22,000 and the second year’s fundraising activities brought in over \$45,000, an increase of over 200%, and the third year netted \$109,666, an increase of nearly 250%.



*Family & Community Engagement*

Changes in the timing and clarified approaches to Family Council meetings led to significantly increased attendance at Friday morning meetings and greater involvement from Vice-chairs and Parent Coordinators. In addition, Parent Enrichment opportunities were held regularly along with workshops for parents throughout the year. Volunteer hours increased in 2018 and a greater number of parents found avenues for participation in school committees.

# Key Elements

These aspects of our original charter application and agreement with the State Charter School Board have been deemed to be central to fully implementing our mission and vision of a fully realized Waldorf school within the context of the Utah Charter School system. Annually, we review progress to help re-center and prevent mission creep.

**Maintain a large enough student population to offer all programmatic elements listed in the approved application.**

Meets: Enrollment has remained steady, with consistent interest allowing WCS to continue to grow and develop all program elements intended.

**Be based on a developmental approach to curriculum which uses Waldorf methods and partners with public or private Waldorf associations.**

Meets: Teachers and administration are utilizing developmental approach to curriculum, Waldorf methods, and working with a variety of trainers and mentors to deepen faculty knowledge and work. WCS is a member of the Alliance for Public Waldorf Education and also attends events and trainings associated with the Association for Waldorf Schools of North America (AWSNA).

**Teachers actively participate in a Waldorf teacher training within 2 years of employment and complete training within the expected timeframe for the selected program.**

Meets: As noted above, 56% of teachers and administrators have completed Waldorf training and another 38% are actively enrolled in a training program / plan at this time.

**Integrate the Utah Core Standards into the existing Waldorf curriculum to seamlessly teach competencies and material.**

Meets: Guides for teachers, professional development and alignment documents are all

developed or in process to support the seamless integration of standards into the Waldorf curriculum. This is a matter of on-going effort and development, as it relies, in part, on teacher experience and competencies.

**Integrates arts and hands-on activities into curriculum to promote human development and brain development, including all five of the key methods through which children build neural connections: music, art, handwork, movement, and forming personal connections to adults.**

Meets: Arts, hands-on activities, music, movement, handwork, and connection continue to thrive in WCS. These elements are clearly demonstrable in classroom observations. Professional development and collaboration is being facilitated to continue to support teachers in growing their own expertise in these areas.

**Offers specialty classes taught outside Main Lessons and practice periods that further integrate and reinforce curriculum content and holistic development.**

Meets: Specialty classes have been able to build on curriculum in all areas. Class teachers and specialty teachers are collaborating more. A few examples include:

- 5th grade study of Ancient Greece and enhancement through the training for the Greek Pentathlon in Games classes
- Spanish classes focused on culture and language of South America that enhances middle school study of South American Geography
- Handwork classes in 1-3 grade that build fine motor skills, patterning skills for mathematics, bi-lateral brain integration for reading, coordination, concentration
- Gardening classes for 7th grade that supplement CTE classes on land use, agriculture, and farming

**Use a holistic approach of formative assessment.**

Meets: WCS hired a FT dedicated Assessment Coordinator and has been fine tuning the tools and schedule for assessments, including the format and platform for teacher-based assessments on report cards.

**Teachers loop with students, staying with same group of students for multiple grades, when possible from grades 1 – 8.**

Meets: Many teachers have been able to loop with their classes, although individual needs and circumstances and changes in staffing often create exceptions and always will.

**Includes a Family Council that meets regularly, typically monthly during the school year, to coordinate efforts to involve families, build school culture, participate in**



**committees, and provide advice to governing board regarding family and student needs.**

Meets: New Family Council leadership and new structure helped to strengthen this body.

Other improvements included:

- Greater involvement of Parent Coordinators with Vice-chairs serving as liaisons with particular grades
- More reports from Committees and Working Groups
- New meeting time during school day on Fridays

**Has a garden and farming program which partners with local farms and gardens, outdoor education programs, and local natural resource organizations to provide educational experiences to students, including instruction in gardening and cooking.**

Meets: WCS secured the lease to farm 11 acres of county land near to the school site.

Additional gardening and farming opportunities are expected through this collaboration.

Work continues towards including items from the garden in the school lunch program.

Gardening classes have included more cooking.

**Students receive regular foreign language instruction.**

Meets: A second Spanish teacher was been hired to support the continued growth of the older student body and bi-weekly Spanish lessons for nearly all classes.

**Students receive consistent musical instruction through their class activities and specialty classes (in grades 4 – 8).**

Meets: All classes begin their Main Lesson with singing and song. Many are playing penny whistles, recorders and flutes. Students from grades 4-8 have strings twice a week and choir.

**Incorporates movement into Main Lesson activities and into the school day through games and eurythmy classes.**

Meets: Movement is alive and well in WCS and is a part of the beginning of all classes Main Lessons. Classes from 1-8 grade had games class 1-2 times a week, and grades 1-5 had eurythmy 1-2 times a week. All teachers are receiving more training on bringing movement into their classrooms, particularly therapeutic movement throughout the day.

**Incorporates sustainable living practices, environmental stewardship, and experiential learning through outdoor experiences and sustainable practices.**

Meets: Many outdoor experiences occurred, including nature walks, hikes, time outdoors,

gardening and camping trips. Continued work occurred on gardening program, recycling program, and farming, as well as supporting teachers in developing an understanding of how to teach outdoors.

**Uses a community-wide approach to discipline, including offering training to teachers, parents, and community members on the “3 streams” (or an equivalent) approach to working with students on discipline, social inclusion, and Rtl processes**

Meets: Kim John Payne returned to train faculty, parents, and Student Support Team during August. A guide for parents and faculty on the discipline and Student Support process (including a process for referrals and case management) was distributed and the focus of parent education during Back to School Night. Additional staffing was provided to support this process more robustly.

Rti process formalized with referral forms and format for Support Circle meetings with parents, 3 week follow-ups and SPED referral process. Progress monitoring formalized and supported by Assessment Coordinator.

**Parents and families are involved in a community of learning, including regular festivals, classes, and activities that connect to the purposes and mission of WWCS.**

Meets: Parents were given a guide to the year and the WCS culture at the beginning of the year. Many activities are occurring regularly, such as parenting classes, Family Council Meetings, Back to School Night, Panel Discussion & Class Parent Nights, Visiting Lecturers, and Festivals and Assemblies.

### *Charter Agreement Performance Measures*

**Percentage of students demonstrating growth on WCS Assessment Rubrics at the beginning and end of the year on a variety of competencies: *WWCS will return to SCSB to set appropriate metric and targets prior to the beginning of their 4<sup>th</sup> year of operation, but will have annual meetings with SCSB Office staff showing progress toward gathering data and establishing a valid and reliable assessment tool***

Development in process. Identifying meaningful and reliable tools to use to track growth.

**Percentage of students in grades 6 – 8, who have attended 3 FAY, who are proficient according to the state summative ELA assessment: Greater than or equal to 3%.**

40% of WCS students in the 6-8 grades who had attended for 3 full academic years were proficient on RISE for ELA. The State Average was 45%.

**Percentage of students in grades 6 – 8, who have attended 3 FAY, who are proficient according to the state summative Mathematics assessment: Greater than or equal to 5%.**

22% of WCS students in the 6-8 grades who had attended for 3 full academic years were proficient on RISE for Math. The State Average was 43%.

**Percentage of students in grades 6 – 8, who have attended 3 FAY, who are proficient according to the state summative Science assessment: Greater than or equal to 4%.**

40% of WCS students in the 6-8 grades who had attended for 3 full academic years were proficient on RISE for Science. The State Average was 51%.

**Percentage of students in grade 3 reading on grade level at the beginning and end of the year: 90%**

2016-17: **88%** of students in third grade that were proficient at the beginning of the year remained proficient at the end of the year.

2017-18: **100%** of students in third grade that were proficient at the beginning of the year remained proficient at the end of the year.

2018-2019: **100%** of students in third grade that were proficient at the beginning of the year remained proficient at the end of the year.

**Percentage of students in grade 3 not reading on grade level at the beginning of the year who are reading on grade level at the end of the year: 40%.**

2016-17: **10%** of students who were not proficient at the beginning of the year reached proficiency by the end of the year. WCS met its UNIFORM GROWTH GOAL as set and calculated by the Utah State Board of Education.

2017-18: **6%** of students who were not proficient at the beginning of the year reached proficiency by the end of the year. WCS again met its UNIFORM GROWTH GOAL as set and calculated by the Utah State Board of Education.

2018-19: **29%** of students who were not proficient at the beginning of the year reached proficiency by the end of the year.

In 2018-19, the State's cut score for the UNIFORM GROWTH GOAL increased from 48% to 60% and shifted to include not only 3rd Grade students, but all of 1st-3rd. WCS scored 59% and just missed the newly increased standard as set and calculated by the Utah State Board of Education.

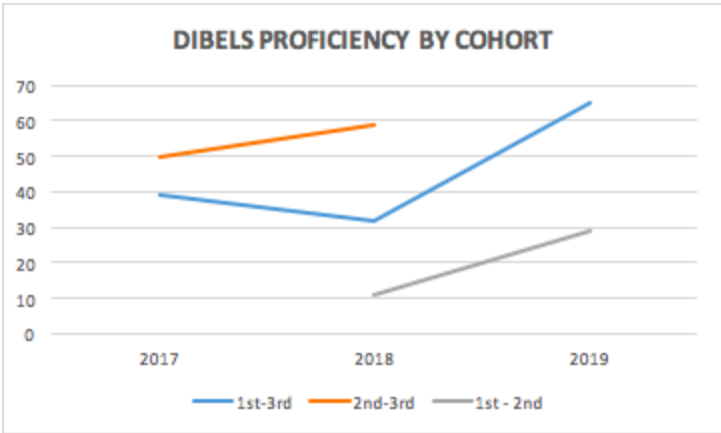
<b>Percentage of students in grades 1 – 8 missing <math>\geq 10\%</math> of school days: 14% or less.</b>
2016-17: 15% of students missed over 10% of the school year.
2017-18: 22% of students missed over 10% of the school year.
2018-19: 12% of students missed over 10% of the school year.

### Student Achievement Scores

Overall, students were assessed using three tools: DIBELS (an indicator of early reading used in grades 1-3 and administered three times a year), RISE (State-mandated summative test given to students in grades 3-8 in English Language Arts (ELA), math, and science at the end of the year), and Fast Bridge (a benchmark assessment used internally for students to track progress in ELA and math). An overall analysis of WCS students' score shows that growth occurred across the board on all of these measures.

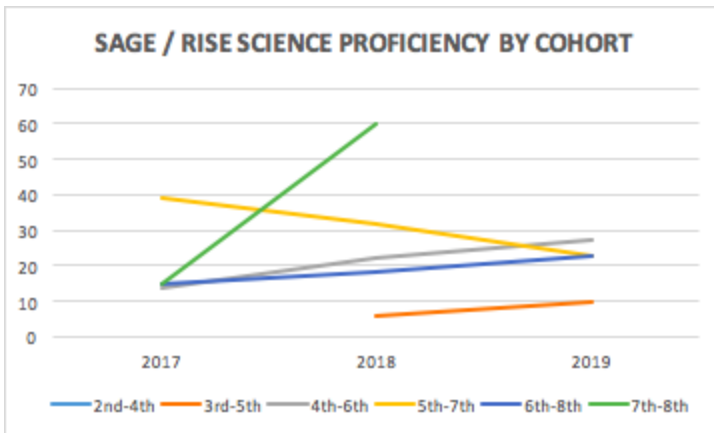
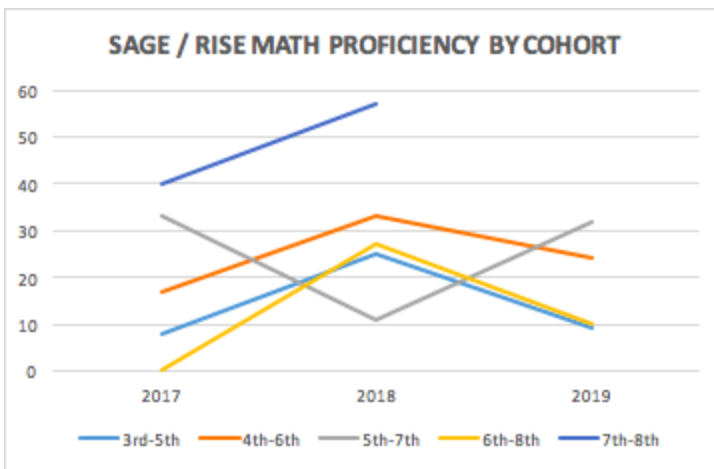
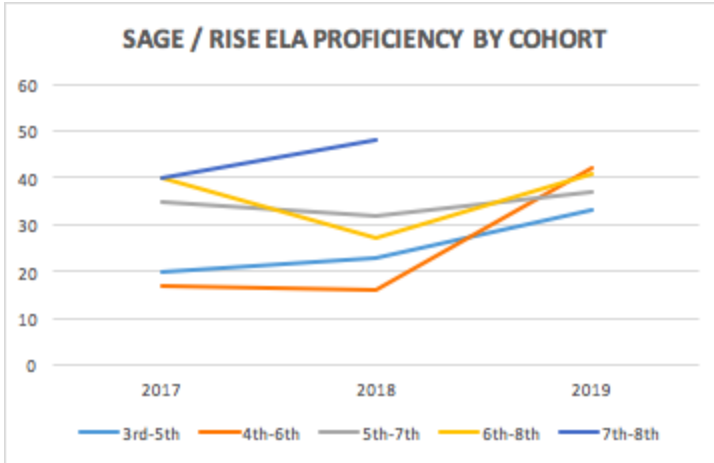
### READING LOWER GRADES

Overall, reading scores for students in grades 1-3 increased over the course of the year. The second grade moved from 11% at the end of first grade to 29% proficient at the end of second grade. The third grade moved from 32% at the end of second grade to 65% at the end of third grade.



### UPPER GRADES

In several grades the overall proficiency of a given cohort of students increased substantially over the course of the academic year. All grades made significant gains in proficiency levels in English Language Arts and the seventh grade made significant gains in math.



## FIRST GRADE

### First Grade Literacy (DIBELS)

Percent of Students Proficient at Beginning of the Year	23%
Percent of Students Well-Below Proficient at Beginning of the Year	72%
Percent of Students Proficient at End of the Year	14%
Percent of Students Well-Below Proficient at End of the Year	76%
Students Maintaining Proficiency Throughout Year	64%
Students Below who Moved to Proficiency Throughout Year	0%

## SECOND GRADE

### Second Grade Literacy (DIBELS)

Percent of Students Proficient at Beginning of the Year	26%
Percent of Students Well-Below Proficient at Beginning of the Year	61%
Percent of Students Proficient at End of the Year	34%
Percent of Students Well-Below Proficient at End of the Year	37%
Students Maintaining Proficiency Throughout Year	100%
Students Below who Moved to Proficiency Throughout Year	11%

## THIRD GRADE

### Third Grade Literacy / ELA

Percent of Students Proficient at Beginning of the Year (assessed by DIBELS)	48%
Percent of Students Well-Below Proficient at Beginning of the Year (assessed by DIBELS)	46%
Percent of Students Proficient at End of the Year (assessed by DIBELS)	60%

Percent of Students Well-Below Proficient at End of the Year (assessed by DIBELS)	31%
Students Maintaining Proficiency Throughout Year (assessed by DIBELS)	100%
Students Below who Moved to Proficiency Throughout Year (assessed by DIBELS)	20%
WCS Percent Proficient on RISE	18%
State Percent Proficient on RISE	47%
Male Students Proficient on RISE	13%
Female Students Proficient on RISE	14%
Caucasian Students Proficient on RISE	13%
Other Racial Groups Proficient on RISE	14%
Students with Disabilities Proficient on RISE	13%
Economically Disadvantaged Students Proficient on RISE	16%

### Third Grade Math

WCS Percent Proficient on RISE	14%
State Percent Proficient on RISE	51%
Male Students Proficient on RISE	29%
Female Students Proficient on RISE	46%
Caucasian Students Proficient on RISE	40%
Other Racial Groups Proficient on RISE	42%
Students with Disabilities Proficient on RISE	0%
Economically Disadvantaged Students Proficient on RISE	12%

## FOURTH GRADE

### Fourth Grade Math (RISE)

WCS Percent Proficient on RISE	10%
State Percent Proficient on RISE	47%
Male Students Proficient on RISE	14%
Female Students Proficient on RISE	8%
Caucasian Students Proficient on RISE	9%
Other Racial Groups Proficient on RISE	16%
Students with Disabilities Proficient on RISE	24%
Economically Disadvantaged Students Proficient on RISE	10%

### Fourth Grade ELA (RISE)

WCS Percent Proficient on RISE	39%
State Percent Proficient on RISE	47%
Male Students Proficient on RISE	29%
Female Students Proficient on RISE	46%
Caucasian Students Proficient on RISE	40%
Other Racial Groups Proficient on RISE	37%
Students with Disabilities Proficient on RISE	7%
Economically Disadvantaged Students Proficient on RISE	37%

### Fourth Grade Science

WCS Percent Proficient on RISE	8%
State Percent Proficient on RISE	51%
Male Students Proficient on RISE	15%



Female Students Proficient on RISE	4%
Caucasian Students Proficient on RISE	8%
Other Racial Groups Proficient on RISE	11%
Students with Disabilities Proficient on RISE	0%
Economically Disadvantaged Students Proficient on RISE	5%

## FIFTH GRADE

### Fifth Grade Math (RISE)

WCS Percent Proficient on RISE	9%
State Percent Proficient on RISE	49%
Male Students Proficient on RISE	14%
Female Students Proficient on RISE	5%
Caucasian Students Proficient on RISE	8%
Other Racial Groups Proficient on RISE	15%
Students with Disabilities Proficient on RISE	0%
Economically Disadvantaged Students Proficient on RISE	5%

### Fifth Grade ELA (RISE)

WCS Percent Proficient on RISE	33%
State Percent Proficient on RISE	48%
Male Students Proficient on RISE	32%
Female Students Proficient on RISE	34%
Caucasian Students Proficient on RISE	34%
Other Racial Groups Proficient on RISE	31%
Students with Disabilities Proficient on RISE	0%

Economically Disadvantaged Students Proficient on RISE	33%
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### Fifth Grade Science

WCS Percent Proficient on RISE	14%
State Percent Proficient on RISE	52%
Male Students Proficient on RISE	14%
Female Students Proficient on RISE	11%
Caucasian Students Proficient on RISE	12%
Other Racial Groups Proficient on RISE	23%
Students with Disabilities Proficient on RISE	0%
Economically Disadvantaged Students Proficient on RISE	15%

## SIXTH GRADE

### Sixth Grade Math (RISE)

WCS Percent Proficient on RISE	24%
State Percent Proficient on RISE	40%
Male Students Proficient on RISE	17%
Female Students Proficient on RISE	28%
Caucasian Students Proficient on RISE	22%
Other Racial Groups Proficient on RISE	Unavailable, sample size too small
Students with Disabilities Proficient on RISE	Unavailable, sample size too small
Economically Disadvantaged Students Proficient on RISE	23%

### Sixth Grade ELA (RISE)

WCS Percent Proficient on RISE	42%
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State Percent Proficient on RISE	49%
Male Students Proficient on RISE	39%
Female Students Proficient on RISE	43%
Caucasian Students Proficient on RISE	44%
Other Racial Groups Proficient on RISE	Unavailable, sample size too small
Students with Disabilities Proficient on RISE	Unavailable, sample size too small
Economically Disadvantaged Students Proficient on RISE	31%

### Sixth Grade Science

WCS Percent Proficient on RISE	39%
State Percent Proficient on RISE	58%
Male Students Proficient on RISE	35%
Female Students Proficient on RISE	43%
Caucasian Students Proficient on RISE	42%
Other Racial Groups Proficient on RISE	Unavailable, sample size too small
Students with Disabilities Proficient on RISE	Unavailable, sample size too small
Economically Disadvantaged Students Proficient on RISE	39%

## SEVENTH GRADE

### Seventh Grade Math (RISE)

WCS Percent Proficient on RISE	32%
State Percent Proficient on RISE	46%
Male Students Proficient on RISE	35%

Female Students Proficient on RISE	43%
Caucasian Students Proficient on RISE	42%
Other Racial Groups Proficient on SAGE	Unavailable, sample size too small
Students with Disabilities Proficient on RISE	Unavailable, sample size too small
Economically Disadvantaged Students Proficient on RISE	18%

### Seventh Grade ELA (RISE)

WCS Percent Proficient on RISE	37%
State Percent Proficient on RISE	44%
Male Students Proficient on RISE	31%
Female Students Proficient on RISE	50%
Caucasian Students Proficient on RISE	41%
Other Racial Groups Proficient on RISE	Unavailable, sample size too small
Students with Disabilities Proficient on RISE	Unavailable, sample size too small
Economically Disadvantaged Students Proficient on RISE	30%

### Seventh Grade Science

WCS Percent Proficient on RISE	29%
State Percent Proficient on RISE	45%
Male Students Proficient on RISE	29%
Female Students Proficient on RISE	28%
Caucasian Students Proficient on RISE	31%
Other Racial Groups Proficient on RISE	Unavailable, sample size too small
Students with Disabilities Proficient on RISE	Unavailable, sample size too small

Economically Disadvantaged Students Proficient on SAGE	25%
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## EIGHTH GRADE

### Eighth Grade Math (RISE)

WCS Percent Proficient on RISE	10%
State Percent Proficient on RISE	43%
Male Students Proficient on RISE	Unavailable, sample size too small
Female Students Proficient on RISE	15%
Caucasian Students Proficient on RISE	11%
Other Racial Groups Proficient on RISE	Unavailable, sample size too small
Students with Disabilities Proficient on RISE	Unavailable, sample size too small
Economically Disadvantaged Students Proficient on RISE	Unavailable, sample size too small

### Eighth Grade ELA (RISE)

WCS Percent Proficient on RISE	41%
State Percent Proficient on RISE	44%
Male Students Proficient on RISE	Unavailable, sample size too small
Female Students Proficient on RISE	57%
Caucasian Students Proficient on RISE	43%
Other Racial Groups Proficient on RISE	Unavailable, sample size too small
Students with Disabilities Proficient on RISE	Unavailable, sample size too small
Economically Disadvantaged Students Proficient on RISE	Unavailable, sample size

	too small
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**Eighth Grade Science**

WCS Percent Proficient on RISE	60%
State Percent Proficient on RISE	49%
Male Students Proficient on RISE	Unavailable, sample size too small
Female Students Proficient on RISE	43%
Caucasian Students Proficient on RISE	31%
Other Racial Groups Proficient on RISE	Unavailable, sample size too small
Students with Disabilities Proficient on RISE	Unavailable, sample size too small
Economically Disadvantaged Students Proficient on RISE	Unavailable, sample size too small

# Our Operations

## Governance

Governance of the school is overseen by a 5-9 member Board of Directors and their appointee, the Executive Director. Over the course of the 2018-19 school year, the Board of Directors has increased in professionalism, received helpful trainings, and reviewed policies, as well as maintaining ongoing responsibilities for oversight of budgets, operations, and fundraising. The Board also developed and implemented a formal Executive Director Evaluation and Board Self-Evaluation process as well as improving Board handbooks, agreements, and on-boarding processes.

Key required functions that have been complied with include:

- ❖ The Governing Board has instituted policies and programs to ensure compliance with the terms and conditions of the Charter Agreement as well as compliance with all governing laws, regulations, and rules.
- ❖ The Governing Board has a website with the content requirements found in R277-482, Utah Administrative Code, posted at least 180 days prior to the opening day of school. In addition, the SCSB requires the website contain links to school data and accountability reports maintained on other websites (e.g., student assessment, audited financial statement, etc.); links to Governing Board meeting dates, agendas and minutes; and reports created by the Governing Board to provide evidence of how the Charter School performed compared to the assurances and school accountability measures in this Charter Agreement.
- ❖ The Charter School's Governing Board has submitted such reports as required by state and federal law, this Charter Agreement, and as may be requested by the SCSB.
- ❖ WCS protects the the rights of students with disabilities.
- ❖ WCS has all full-time class teachers with a current license or temporary authorization to provide that they are State Qualified. Details on qualifications are above.
- ❖ WCS complies with Governance Requirements and the developing Governing board policies, including those related to oversight of an Education Service Provider, if applicable and governing board by-laws, Utah Open & Public Meetings Act, Governing board code of ethics, Governing board conflicts of interest, and Governing board composition and/or membership rules (e.g., requisite number of qualified teachers, restriction on employees or contractors serving on the board, etc.).

# Finances



WCS is carefully managing state, federal, and local funds to meet all priorities and needs. State funding comprises 90% of all revenue to the school, with Federal funds providing 1% and Fundraising making up 2%. The vast majority of funding is used to pay salaries and benefits, comprising 62% of all costs. Building expenses (including maintenance, grounds care, and other costs) comprised 19% of expenses, with the lease alone making up 17.5% of total budget. Professional services comprise 7% of the total budget, including professional development costs and special education service providers.

Pursuant to U.C.A. § 63G-7-604(4) and Rule 37-4, U.A.C, the WCS obtained and maintains insurance through the Utah State Division of Risk Management or other suitable insurance carrier (with a general policy holder rating of not less than A and a financial rating of AAA as rated in the most current available “Best Guide” Insurance Report) coverage to insure against all claims up to and including the limitation of judgements established by statute and rule. Such coverage shall include but not be limited to:



- 1) General liability;
- 2) Employee dishonesty bond;
- 3) Workers' compensation, as specified by federal law;
- 4) Comprehensive/collision consistent with cash values of vehicles if applicable;
- 5) Liability insurance specific to the School's Governing Board's financial officer or treasurer or business administrator consistent with coverage designated in USBE rule.

SCSB is named as an additional insured under any and all general liability insurance policies required by this section.

In terms of State Financial Metrics, the following information provides details by metric.

<b>Number of Material of Significant Audit Findings, Current Year</b>
<p>2016-17: No findings on enrollment audit.</p> <p>Two findings on financial audit which have been addressed and formal response is being sent to USBE by May 30.</p> <ol style="list-style-type: none"> <li>1. Need to increase coverage on Treasurer's Bond</li> <li>2. Need to formally appoint Records Officer (Ms. Merchant and Ms. Salisbury had been identified and attended training, but training was in December 2015 and there had not been a formal Board vote. That has been remedied for the coming year.)</li> </ol>
<p>2017-18: No material findings.</p>
<p>2018-19: One finding related to additional spending from project fund part of bond that was not listed in original budget as "revenue."</p>

<b>Number of Unresolved Audit Findings from Prior Year</b>
<p>2016-17: N/A</p>
<p>2017-18: See Above. All findings have been addressed.</p>
<p>2018-19: N/A</p>

<b>Maintain bond covenants</b>
<p>2016-17: N/A - School does not have a bond.</p>
<p>2017-18: Covenants were maintained for the months in which they existed.</p>

2018-19: Covenants were maintained.

**Adherence to Operational Budget: Within 5%**

2016-17: Current projections are for less than 1% deviation from budget projections. Final budget will be accurate.

2017-18: Yes.

2018-19: No.

**Occupancy Costs: 28% or less**

2016-17: 17.5%

2017-18: 17.5%

2018-19: 19%

**Debt service coverage ratio: 1.1**

2016-17: 1.39 is current (Red Apple Goal is 1.25)

2017-18: 1.31

2018-19: 1.24

**Cashflow: Positive**

2016-17: Meets. Cash flow has remained positive all year.

2017-18: Meets.

2018-19: Meets.

**Total Margin of Net Income to Revenue (for 3 years aggregated): Positive**

2016-17: 5.3%

2017-18: 4.2%

2018-19: 3.8%
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<b>Enrollment Variance (October 1 count compared to projections): 95%</b>
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2016-17: 100%. October 1 enrollment was 540 (as verified on audit). Projections for 2016-17 were 540.
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2017-18: October 1 count was 558. Budget was 540.
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2018-19: October 1 count was 628. Budget was 634.
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<b>Unrestricted Cash on Hand: 30 days with a positive trend.</b>
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2016-17: 48 days cash on hand.
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2017-18: 44 days cash on hand.
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2018-19: 61 days cash on hand.
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<b>Ratio of Assets to Liabilities: 1.0 with positive trend</b>
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2016-17: 2
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2017-18: 1.0
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2018-19: 1.01
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<b>Debt to asset ratio: less than or equal to .9</b>
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2016-17: Meets -- more assets (cash and property) than debt
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2017-18: Meets
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2018-19: Meets
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# Our Plans for Success

## *Framework for Success*

Based on State requirements and school-level leadership, WCS has developed a comprehensive “Framework for Success.” This document represents analysis of the root causes of challenges, areas of strength and opportunities for growth. This document synthesizes many elements with a desire to weave together State mandates and required goals with the mission, vision and culture of WCS as a Waldorf School.

This document includes:

- An Overview of the Paradigm and Definition of “Success” at WCS
- Strategic Priorities for the 2019-2020 School Year
- A Long-term Vision / Strategic Plan
- Required State & Federal Plans

This document is available on the schools website at:

<http://wasatchwaldorf.org/teacher-and-student-success-plan/>.