



**AGENDA**  
**Board of Directors Meeting**  
**1086 Alcatraz Ave, Oakland, CA 94608**

**6:00 pm ~ September 18, 2014**

*Vision & Mission*

*Yu Ming Charter School will provide a challenging and comprehensive education for Kindergarten through 8<sup>th</sup> grade students, preparing them to be inquisitive and analytic lifelong learners in the 21<sup>st</sup> Century world. Our mission is:*

- *To provide an academically rigorous college preparatory program*
- *To graduate students with bilingual and biliterate skills in Mandarin and Chinese*
- *To nurture intellectual curiosity, international perspective and diligence in attaining personal goals*
- *To develop young people with compassion, sound moral character and a sense of responsibility for the community and the environment*

**I. PRELIMINARY**

**A. CALL TO ORDER**

Meeting was called to order at \_\_\_\_\_.

**B. ROLL CALL**

Robert Donnelly

Diana Lee

Gloria Lee

Eric Peterson

Rodrigo Prudencio

Chrissy Schwinn

Josh Stern

Kelun Zhang

Present

Absent

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**C. APPROVAL OF AGENDA**

Motion by: \_\_\_\_\_

Seconded by: \_\_\_\_\_

Vote: \_\_\_\_\_

**II. INVITATION TO THE PUBLIC TO ADDRESS THE BOARD**

**III. CONSENT AGENDA (5 min)**

**A.** Approve the August 21 and 23, 2014 minutes

**B.** Approve the August Check Register

**IV. INFORMATION and ACTION ITEMS**

**A.** Principal's Report (Laura – 10 min)

1. Report from Principal



2. PAG report

**B. Finance Committee (Laura – 20 min)**

1. Review YTD Financials
2. Approve 2012-2013 Unaudited Financials

**C. School Goals for 2014-2015 (Gloria – 60 min)**

1. Discuss proposed goals for this school year
2. Approve goals or decide next steps to finalize goals

**D. Education Committee (Eric – 10 min)**

1. Discuss Ed Committee focus and goals

**E. Board Development: (Diana / Rodrigo – 10 min)**

1. Discuss Board recruiting and development

**F. Facilities: (Bob - 10 min)**

1. Discuss Facilities Committee Update

**G. Compensation: (Gloria - 10 min)**

1. Discuss Compensation Committee

**V. REVIEW OF ACTION ITEMS AND FUTURE AGENDA ITEMS**

**VI. ADJOURNMENT**

The meeting was adjourned at \_\_\_\_\_.

**THE ORDER OF BUSINESS MAY BE CHANGED WITHOUT NOTICE**

Notice is hereby given that the order of consideration of matters on this agenda may be changed without prior notice.

**REASONABLE LIMITATIONS MAY BE PLACED ON PUBLIC TESTIMONY**

The Governing Board's presiding officer reserves the right to impose reasonable time limits on public testimony to ensure that the agenda is completed.

**REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY**

Pursuant to the *Rehabilitation Act of 1973* and the *Americans with Disabilities Act of 1990*, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting of the Governing Board may request assistance by contacting Yu Ming Charter School during normal business hours at 1086 Alcatraz Ave, Oakland, CA 94608; telephone (510) 452-2063 as far in advance as possible, but no later than 24 hours before the meeting.

**FOR MORE INFORMATION**

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**AGENDA**  
**Board of Directors Meeting**  
**1086 Alcatraz Ave, Oakland, CA 94608**

**6:00 pm ~ August 21, 2014**

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**I. PRELIMINARY**

**A. CALL TO ORDER**

Meeting was called to order at 6:07 p.m..

**B. ROLL CALL**

	Present	Absent
Robert Donnelly	<u>  X  </u>	<u>      </u>
Diana Lee	X arrived 6:19 pm	<u>      </u>
Gloria Lee	<u>  X  </u>	<u>      </u>
Eric Peterson	<u>  X  </u>	<u>      </u>
Rodrigo Prudencio	<u>  X  </u>	<u>      </u>
Chrissy Schwinn	<u>  X  </u>	<u>      </u>
Josh Stern	<u>  X  </u>	<u>      </u>
Kelun Zhang	<u>      </u>	<u>  X  </u>

**C. APPROVAL OF AGENDA**

Motion by: Chrissy  
Seconded by: Robert  
Vote: unanim

**II. INVITATION TO THE PUBLIC TO ADDRESS THE BOARD**

No public comments

**III. CONSENT AGENDA**

- A.** Approve the June 26 and July 24, 2014 minutes
- B.** Approve the June & July Check Register
- C.** Approve contract with Oakland Youth Chorus

Motion by: Rodrigo (in aggregate of items A-C)  
Seconded by: Chrissy



Vote: unan

	Aye	Nay	Abstain
Robert Donnelly	<u>  X  </u>	_____	_____
Diana Lee	<u>  X  </u>	_____	_____
Gloria Lee	<u>  X  </u>	_____	_____
Eric Peterson	<u>  X  </u>	_____	_____
Rodrigo Prudencio	<u>  X  </u>	_____	_____
Chrissy Schwinn	<u>  X  </u>	_____	_____
Josh Stern	<u>  X  </u>	_____	_____

**IV. INFORMATION and ACTION ITEMS**

**A. Principal’s Report**

*Principal Ross gave an update on the start of school, partnership w/Oakland Youth Chorus, new staff, the need to clarify compensation and salary schedule, staff retreat, and staff diversity training starting tomorrow.*

*PAG provided an update on the first PAG mtg coming up on Aug 26 as well as the Oct 3 night market event, and the street fair this weekend in Chinatown.*

**B. Finance Committee**

*Gloria provided an update - ADA has been pretty good overall - though we lost 4 kids in 4th grade, we are slightly over enrolled in the lower grades. We also need to adjust budget per the changes referenced in the June minutes.*

**C. Board Development**

*Gloria provided an update on board member recruitment efforts and board member candidate pipeline. Will continue discussion on specific characteristics/skills needed at the board retreat.*

**D. Facilities**

*Chrissy Schwinn presented update on facilities progress – a lot of work was done in the last several weeks to get the Herzog site ready for the start of school. Actual costs aligned closely with the estimated costs of \$35,000. Will need to determine next steps re: the play structure and costs associated.*

**V. ADJOURN TO CLOSED SESSION**

**A. CLOSED SESSION**

With respect to every item of business to be discussed in closed session pursuant to Section €54957: PUBLIC EMPLOYEE PEFORMANCE / EVALUATION

**VI. RECONVENE FROM CLOSED SESSION**

**A. ROLL CALL**

	Present	Absent
Robert Donnelly	<u>  X  </u>	_____



Diana Lee	<u>  X  </u>	<u>      </u>
Gloria Lee	<u>  X  </u>	<u>      </u>
Eric Peterson	<u>  X  </u>	<u>      </u>
Rodrigo Prudencio	<u>  X  </u>	<u>      </u>
Chrissy Schwinn	<u>  X  </u>	<u>      </u>
Josh Stern	<u>  X  </u>	<u>      </u>

**VII. REVIEW OF ACTION ITEMS FROM CLOSED SESSION**

Move to approve lawyer’s recommended actions to extend Laura’s H-1B visa by October 1st.

Motion by:   Chrissy  

Seconded by:   Robert  

Vote:   unan  

	Aye	Nay	Abstain
Robert Donnelly	<u>  X  </u>	<u>      </u>	<u>      </u>
Diana Lee	<u>  X  </u>	<u>      </u>	<u>      </u>
Gloria Lee	<u>  X  </u>	<u>      </u>	<u>      </u>
Eric Peterson	<u>  X  </u>	<u>      </u>	<u>      </u>
Rodrigo Prudencio	<u>  X  </u>	<u>      </u>	<u>      </u>
Chrissy Schwinn	<u>  X  </u>	<u>      </u>	<u>      </u>
Josh Stern	<u>  X  </u>	<u>      </u>	<u>      </u>

**VIII. REVIEW OF ACTION ITEMS AND FUTURE AGENDA ITEMS**

**IX. ADJOURNMENT**

The meeting was adjourned at       7:48 p.m.      .

<p><u>THE ORDER OF BUSINESS MAY BE CHANGED WITHOUT NOTICE</u>          Notice is hereby given that the order of consideration of matters on this agenda may be changed without prior notice.</p> <p><u>REASONABLE LIMITATIONS MAY BE PLACED ON PUBLIC TESTIMONY</u>          The Governing Board’s presiding officer reserves the right to impose reasonable time limits on public testimony to ensure that the agenda is completed.</p> <p><u>REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY</u>          Pursuant to the <i>Rehabilitation Act of 1973</i> and the <i>Americans with Disabilities Act of 1990</i>, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting of the Governing Board may request assistance by contacting Yu Ming Charter School during normal business hours at 1086 Alcatraz Ave, Oakland, CA 94608; telephone (510) 452-2063 as far in advance as possible, but no later than 24 hours before the meeting.</p> <p><u>FOR MORE INFORMATION</u>          For more information concerning this agenda or for materials relating to this meeting, please contact:          Yu Ming Charter School at 1086 Alcatraz Ave, Oakland, CA 94608; telephone (510) 452-2063</p>
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**AGENDA**

**Board of Directors Retreat**

**894 Paramount Road, Oakland CA 94610 (private residence)**

**9:00 am – 5:00 pm ~ August 23, 2014**

*Vision & Mission*

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- *To nurture intellectual curiosity, international perspective and diligence in attaining personal goals*
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**I. PRELIMINARY**

**A. CALL TO ORDER**

Meeting was called to order at 9:28 a.m.

**B. ROLL CALL**

	Present	Absent
Robert Donnelly	<u>  X  </u>	<u>      </u>
Diana Lee	<u>  X  </u>	<u>      </u>
Gloria Lee	<u>  X  </u>	<u>      </u>
Eric Peterson	<u>  X  </u>	<u>      </u>
Rodrigo Prudencio	<u>  X  </u>	<u>      </u>
Chrissy Schwinn	<u>  X  </u>	<u>      </u>
Josh Stern	<u>  X  </u>	<u>      </u>
Kelun Zhang	<u>      </u>	<u>  X  </u>

*Principal Laura Ross was also present.*

**C. APPROVAL OF AGENDA**

Motion by: Diana

Seconded by: Chrissy

Vote: Unanim

	Aye	Nay	Abstain
Robert Donnelly	<u>  X  </u>	<u>      </u>	<u>      </u>
Diana Lee	<u>  X  </u>	<u>      </u>	<u>      </u>
Gloria Lee	<u>  X  </u>	<u>      </u>	<u>      </u>
Eric Peterson	<u>  X  </u>	<u>      </u>	<u>      </u>
Rodrigo Prudencio	<u>  X  </u>	<u>      </u>	<u>      </u>
Chrissy Schwinn	<u>  X  </u>	<u>      </u>	<u>      </u>
Josh Stern	<u>  X  </u>	<u>      </u>	<u>      </u>

**II. INVITATION TO THE PUBLIC TO ADDRESS THE BOARD**



No public comments

**III. INFORMATION and ACTION ITEMS**

**A. Goal-setting, including:**

- 1. Student Outcomes
- 2. School Climate and Culture
- 3. School growth and sustainability

*Board reviewed results and progress against goals set from last school year and discussed next steps to finalizing goals for the 2014-2015 school year.*

**B. Board Development**

*Board discussed priorities for board development for the coming year.*

*Board committee chairs will present committee priorities for the year at the September board meeting.*

**C. Long Term Facilities**

*Board discussed next steps for long-term facilities strategies.*

**IV. ADJOURN TO CLOSED SESSION**

**A. CLOSED SESSION:**

With respect to every item of business to be discussed in closed session pursuant to Section €54957: PUBLIC EMPLOYEE PERFORMANCE / EVALUATION

**V. RECONVENE FROM CLOSED SESSION**

**A. ROLL CALL**

	Present	Absent
Robert Donnelly	_X_	_____
Diana Lee	_X_	_____
Gloria Lee	_X_	_____
Eric Peterson	_X_	_____
Rodrigo Prudencio	_X_	_____
Chrissy Schwinn	_X_	_____
Josh Stern	_X_	_____

**VI. REVIEW OF ACTION ITEMS FROM CLOSED SESSION**

*No action was taken.*

**VII. REVIEW OF ACTION ITEMS AND FUTURE AGENDA ITEMS**

**VIII. ADJOURNMENT**

The meeting was adjourned at 5:13 p.m..

Serial Number	Description	Amount	Payee
	PAYCHEX TPS -TAXES ACH Debit	\$23,629.80	
	PAYCHEX EIB -INVOICE ACH Debit	\$199.70	
3596	Withdrawal - Inclearing Check	\$414.77	ACME Fire Extinguisher Co.
	PAYCHEX INC -PAYROLL ACH Debit	\$81,161.16	
3587	Withdrawal - Inclearing Check	\$8,863.17	Reimbursement for Polly Yan
3591	Withdrawal - Inclearing Check	\$393.12	Reimbursement for Lina Huang
3589	Withdrawal - Inclearing Check	\$388.96	Comcast
3593	Withdrawal - Inclearing Check	\$237.00	Reimbursement for Xinyi Xu
3592	Withdrawal - Inclearing Check	\$747.32	Xerox Financial Services
3590	Withdrawal - Inclearing Check	\$300.00	Adolfo Gaspar Garden Services
3581	Withdrawal - Inclearing Check	\$6,825.35	Lincoln Child Center
3561	Withdrawal - Inclearing Check	\$155.54	Reimbursement for Wei Shen
3577	Withdrawal - Inclearing Check	\$5,113.52	EdTec Inc.
3578	Withdrawal - Inclearing Check	\$550.00	Faltz Associates Inc.
	08/22 ADOLPH KIEFER AN 847-8728866 IL Debit Card	\$50.74	
3571	Withdrawal - Inclearing Check	\$9,880.28	ACOE
3583	Withdrawal - Inclearing Check	\$303.78	Reimbursement for Lynna Tsou
3580	Withdrawal - Inclearing Check	\$175.00	JT Lawrence & Co for Lift Inspection
3507	Withdrawal - Inclearing Check	\$57.52	Reimbursement for Carol Kao
3579	Withdrawal - Inclearing Check	\$637.72	Reimbursement for Lina Huang
3576	Withdrawal - Inclearing Check	\$457.61	Donald White, Treasurer & Tax Collector
3585	Withdrawal - Inclearing Check	\$267.97	Waste Management of Alameda County
3573	Withdrawal - Inclearing Check	\$116.00	Reimbursement for Renee Chang
3586	Withdrawal - Inclearing Check	\$30.63	Waste Management of Alameda County
3582	Withdrawal - Inclearing Check	\$297.53	Mr. Copy, Inc. Printing and Reproduction
3574	Withdrawal - Inclearing Check	\$250.35	CoPower
	08/19 SUPPLIESOUTLET.C 877-822-8659 NV Debit Card	\$170.97	
3575	Withdrawal - Inclearing Check	\$3,160.50	Donahue Fitzgerald Attorneys
3588	Withdrawal - Inclearing Check	\$2,439.50	Young, Minney & Corr, LLP
3584	Withdrawal - Inclearing Check	\$1,500.00	Vicenti, Lloyd & Stutzman LLP



3532	Withdrawal - Inclearing Check	\$312.00	Yao Chun Kuo dba Growing Acorn Learning
1176	Withdrawal - Inclearing Check	\$600.00	Veterans Hauling (Herzog clean-up)
3572	Withdrawal - Inclearing Check	\$95.00	Bay Alarm
3569	Withdrawal - Inclearing Check	\$50.19	Reimbursement for Lina Huang
	08/18 MSFT *MICROSOFT BILL.MS.NET WA Debit Card	\$125.99	
	08/18 SQ *SUNSHINE LOC OAKLAND CA Debit Card	\$85.00	
3568	Withdrawal - Inclearing Check	\$2,033.00	Reimbursement for Han Han (moving)
3567	Withdrawal - Inclearing Check	\$140.75	Comcast
1175	Withdrawal - Inclearing Check	\$8,420.00	Gate View Paining
3570	Withdrawal - Inclearing Check	\$377.95	Reimbursement for Xinyi Xu
1174	Withdrawal - Inclearing Check	\$5,000.00	Gate View Paining
3469	Withdrawal - Inclearing Check	\$2,175.00	New Teacher Support & Development
1173	Withdrawal - Inclearing Check	\$1,000.00	Gate View Paining
3552	Withdrawal - Inclearing Check	\$66.65	Reimbursement for Carl Chang
3541	Withdrawal - Inclearing Check	\$614.20	Reimbursement for Laura Ross
3563	Withdrawal - Inclearing Check	\$325.00	Reimbursement for Lynna Tsou (job posting)
	08/11 EAST BAY REST SU 510- 4654300 CA Debit Card	\$1,594.25	
3542	Withdrawal - Inclearing Check	\$856.89	Reimbursement for Jenny Suen
	08/07 NETWORK FOR GOOD 888- 2847978 DC Debit Card	\$69.95	
	08/08 THE/STUDIO CARSON CITY NV Debit Card	\$275.00	
3556	Withdrawal - Inclearing Check	\$2,915.00	Faltz Associates Inc.
3559	Withdrawal - Inclearing Check	\$300.79	PG & E
3558	Withdrawal - Inclearing Check	\$781.86	Mr. Copy, Inc. Printing and Reproduction
3562	Withdrawal - Inclearing Check	\$52.00	The Loss Preventions (finger printing)
3565	Withdrawal - Inclearing Check	\$684.52	Xerox Financial Services
3566	Withdrawal - Inclearing Check	\$225.50	Young, Minney & Corr, LLP
3564	Withdrawal - Inclearing Check	\$88.01	VSP
3555	Withdrawal - Inclearing Check	\$5,401.02	EdTec Inc.
3560	Withdrawal - Inclearing Check	\$4,288.91	Revolution Foods
3557	Withdrawal - Inclearing Check	\$1,687.00	Maxim Staffing Solutions
10101	Withdrawal - Inclearing Check	\$1,255.68	Jenna Ornbaun
3539	Withdrawal - Inclearing Check	\$810.00	Jenna Ornbaun

3553 Withdrawal - Inclearing Check	\$348.39	EBMUD
3554 Withdrawal - Inclearing Check	\$246.16	EBMUD
10100 Withdrawal - Inclearing Check	\$35.76	Yuan-Jen Chang (final check)



**Board of Directors**  
**Thursday, September 18<sup>th</sup>, 2014**  
**AGENDA ITEM INFORMATION**

<b>Agenda Item</b>	Principal Report
<b>Time Allotted</b>	10 minutes
<b>Summary</b>	Principal Ross will provide an update on the first month of school, including Back to School nights.
<b>Type</b>	Information only
<b>Background</b>	A report from the principal, followed by a report from Parent Action Group (PAG) leadership are standing agenda items for Board meetings.
<b>Key Questions</b>	<ul style="list-style-type: none"><li>• What topics would you like the Principal to cover during the next update?</li></ul>
<b>Attachments</b>	<ul style="list-style-type: none"><li>• none</li></ul>



To: Board of Directors  
From: Laura Ross, Principal  
Date: September 18<sup>th</sup>, 2014  
RE: Principal Update for September 18<sup>th</sup> 2014

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Principal Update: 09.18.2014

1. School Wide Task Forces
2. Friday Professional Development Schedule
3. Back to School Night
4. New Information on ELA program
5. Herzog updates

1. School Wide Task Forces

For the 2014-2014 academic year every teacher has been asked to participate in a Yu Ming Task Force. The task forces have been determined in accordance with broad areas of development for the school. They are as follows;

**1. Student Culture and Climate**

This task force will be focused on providing resources and support to school faculty on implementing PBIS, Responsive Classroom and other strategies to address challenging behaviors in the classroom and developing a strategy for teaching and assessing life skills. The task force will use peer observation and video as a method for disseminating good practice.

**2. Cultural Competency Committee**

This task force will be focused on outreach and retention of minority students; anti-bias curriculum and parent education. The task force will actively look to participate or run events that build tolerance in the community and will develop a partnership with the parent community.

**3. Common Core and SBAC**

This task force will be focused on supporting the school in its mission to become truly CCSS aligned. It will help to execute yearly CCSS focuses. This year the focus will be on increasing the amount of non-fiction used in the MLA program; generating a scope and sequence for academic discourse across grades and subjects and through identifying teaching approaches and resources to promote academic language and sharing and in identifying ways to teach and measure how students use evidence in arguments. In addition the task force will drive strategy to help staff members and students to be prepared for the SBAC.

**4. Technology and Innovation**

This task force will be focused on bringing more technology into the classroom to meet CCSS standards and promote student engagement; training staff on technologies piloted by the group; getting more hardware into the classrooms and finding more Chinese language related software to promote literacy.



## **5. School Culture and Climate**

This task force will be focused on building a strong staff culture; mentoring for new teachers; supporting the hiring process; creating a social calendar and generating feedback from staff on how to improve school culture

These task forces will most likely not remain constant. They will change according to the needs of the school as determined by feedback from staff, students and parents as well and identified by administration.

## **2. Friday Professional Development Schedule**

This year we will be approaching Friday PD's with a structure as follows (according to 4 Fridays in the month);

- Friday 1: Staff Faculty Meeting followed by Mandarin and English Department meetings (school events etc)
- Friday 2: Whole School Professional Development (PBIS, Responsive Classroom, Diversity Training etc.)
- Friday 3: Cross Grade Collaboration K-2<sup>nd</sup> and 3<sup>rd</sup> & 4<sup>th</sup> (assessments; curriculum alignment)
- Friday 4: Teacher led professional development (conferences, presentations and task force space)

As in previous years grade level planning takes place outside of Friday PD time (in additional prep time or after school).

## **3. Back to School Night**

In an attempt to improve the experience for our parents, this year at Back to School Night we tried out a few new things:

- A presentation from Diana and I (rather than a talk as had been done in previous years)
- A template for teacher presentations (all Mandarin teachers were asked to complete one and put it on the parent portal- not all teachers used the presentation on the night)
- Some new handouts; who to contact, parent questionnaire, and child development pamphlets
- Additional time with the Mandarin classroom teacher (a change made from feedback on last year's B2SN survey)

We will be sending out a brief survey (the same as last year) to see what parents thought of the night this Friday.

## **4. New information on the ELA program**

We are using a new assessment for English K-4<sup>th</sup> grade called the DRA (Developmental Reading Assessment). The DRA is a standardized reading test used to determine a student's instructional level in reading (measuring both fluency and comprehension). The DRA is administered individually to students by teachers and/or reading specialists. Students read a selection (or selections) and then retell what they have read to the examiner. As the levels increase, so does the difficulty level for each selection. We will be using the DRA three times a year in the Fall, Winter and Spring trimester. The assessment will be used by teachers to determine whether students are reading on, above, or below grade level. By



knowing student DRA levels, teachers can plan for small group, guided reading instruction, including targeted interventions and supplemental support. Teachers select materials that match students' instructional levels and provide appropriate instruction to challenge them. In addition they will be used to inform the grades given on the student report cards each trimester.

The Shared Inquiry program that was introduced last year in grade 3 has now been brought in at grade 2 as well as extended up to 4<sup>th</sup> grade. Last week I was excited to watch students answer the question 'Which character in the story is more dishonest? Find evidence in the text that supports that idea. They were making a claim and finding evidence for it in the text by underlining it. In their journal answers they were referencing the page in which they found the evidence.

#### 5. Herzog updates

We now have a re-therm warmer and are waiting on Health Department approval. All other items in the kitchen are now meeting requirements. This is the last remaining item for the ACOE. We are following up on a couple of items with OUSD that I believe would enhance security for both our lock down procedure and our off site drills. OUSD are sending people out to come and price up the work though at this point it is not clear whether they would do the work and take the cost. Most likely we would need to pay for the work to be completed. We conducted our first safety drills last week and the local police officer is coming out to visit Tuesday 16<sup>th</sup>.



**Board of Directors**  
**Thursday, September 18, 2014**  
**AGENDA ITEM INFORMATION**

<b>Agenda Item</b>	Finance – YTD Financials
<b>Time Allotted</b>	10 minutes
<b>Summary</b>	Yu Ming continues to have a strong financial position.
<b>Type</b>	Information
<b>Background</b>	EdTec has provided its regular monthly financial report, including cash flow, and YTD budget versus actual.  For this meeting, we will do Q&A with Principal Ross. Please read the materials in advance.
<b>Key Questions</b>	<ul style="list-style-type: none"><li>• What other information, if any, does the Board wish to see in the monthly financial reports?</li></ul>
<b>Attachments</b>	<ul style="list-style-type: none"><li>• YTD Financials</li><li>• YTD Cash Flow</li></ul>

# Yu Ming Charter School

## 2013-14 Year End & August 2014 Financial Presentation



September 18,  
2014

Yoon Chang



# Financial Presentation Agenda



- California State Update
- Unaudited Actuals
- Financial Update for 2014-15
  - July Financials
  - Change to June's Approved Budget
  - Cash Flow Projections

# 1. CA State Update

# California State Budget Overview

The state has certified the Advance Apportionment with an additional 29% implementation of the LCFF

- Advance Apportionment confirmed a positive outlook:
  - This 29% is in addition to the 12% implementation that was made in June with the 2013-14 P2 certification.
    - The state also included a .85% increase to all school's target LCFF rates.
  - EPA entitlements are also increasing by 4.42% from P2 in 2013-14.
    - The certification letter for the Advance Apportionment references EPA as 21.96% of 2013-14 total revenue limit funding, but that is from Pre-LCFF calculations that were made at the 2013-14 Q4 EPA certification.
  - Cash outlook is improved, with no fall deferrals
- With these increases certified for the Advance Apportionment, schools will receive a significant amount of additional funding over the first seven months of the year.

## 2. Unaudited Actuals

# 2013-14 Unaudited Actuals

Unaudited Actuals were submitted to ACOE showing an operating surplus of \$349K; another \$302K higher than the approved budget

- A note on recent changes since July:
  - Final operating income increased by \$70K over the previous projection; primarily due to:
    - Adjustment in Federal and State Special Education entitlement – increased revenues by \$21K
      - Yu Ming’s 13-14 FY SPED expenses were approx. \$10K higher than received revenues.
    - School finally received the facilities appt. (SB 740) of \$98K – \$8K more than previously projected
      - Yu Ming was able to get reimbursed for additional facilities expenses that were submitted
    - Actual legal fees were lower than previously projected by \$25K, but the savings was offset by the increase in SPED expenses (by \$11K)
    - Prop 39 Clean Energy related expenses have been removed from the budget (\$50K)
      - The planning fund will be subject to fund balance restriction. It will be carried to the next year to be expended for the same restricted purposes.

# 2013-14 Unaudited Actuals

Unaudited Actuals were submitted to ACOE showing an operating surplus of \$349K; another \$302K higher than the approved budget

- Looking back over 2013-14, Yu Ming had approved a budget last October with a bottom line of \$47K, but concluded the year with the aforementioned surplus of \$349K
  - Revenues totaled \$2.26M, \$295K over 1<sup>st</sup> interim approved budget. Major drivers include:
    - Increased in General Purpose block grant due to higher certified P2 funding rates and increased in enrollment – increased by \$51K
    - Aforementioned increase in SPED entitlement and SB 740 apportionments – increased revenues by \$33K
    - Prop 39 Clean Energy Jobs Act (planning fund) – \$50K
    - Afterschool revenue was \$144K higher than budgeted, and revenues from food sales was \$17K higher than budgeted
  - Expenses totaled \$1.91M, on target with the approved budget:
    - Although school realized some savings in compensation and benefits from the vacant curriculum director position, school increased spending in consultants to supplant.
    - School incurred higher SPED expenditures, but spent less in utilities and legal fees
  - The financial portion of the audit occurs in September/October, with the auditing process typically yielding small changes for the school

## 3. Update for 2014-15

# YTD Actuals and Forecast

The current forecast projects the operating loss of \$129K with the fund balance of \$589K, represents a 24% reserve

- **YTD Actuals: \$100K in YTD revenues, \$269K in expenses**
  - State Aid (\$56K) was received in accordance with the non-deferral schedule
  - Food sales of \$34K was received; this represents a half of the total projected revenues
  - Overall expenses are tracking below projections by \$15K, with the exception of classroom and other equipment and supplies being over budget
  - Other early-year expenses are reasonable relative to budget
  
- **Forecast: Operating income increased by \$8K**
  - Increased LCFF funding rate resulted in General Purpose entitlement by \$10K
  - Some expense projections have been shifted around 5000s, and 6000s.



# Cash Update

School is in a good position due to LCFF implementation



## Cash Update

- Most of the cash inflow in July and August have been the receipt of approximately \$312K of accruals from the 13-14 FY. The remaining accruals will arrive in the next couple of months.
- In line with the state's Advance Apportionment, there are NO fall deferrals
  - Funds arrive on the 5-5-9 schedule through January
  - We still assume June deferral is in place this year
- Cash Flow should remain healthy throughout the year

**Yu Ming Charter School**  
Budget vs. Actuals

As of most recent monthly close

	<b>Actual</b>				<b>Budget vs. Actual</b>	<b>2013-14 Budget</b>		
	Apr	May	Jun	Actual YTD	Approved 1st Interim Budget	Current Forecast	Variance (Budget vs. Current Forecast)	Forecast Remaining
<b>SUMMARY</b>								
<b>Revenue</b>								
General Block Grant	162,822	51,449	-	964,526	1,189,742	1,236,198	46,456	271,672
Federal Revenue	-	-	-	-	-	19,431	19,431	19,431
Other State Revenues	26,056	-	1,694	173,792	249,179	317,582	68,402	143,790
Local Revenues	35,728	12,103	80,264	399,681	240,185	399,681	159,496	-
Fundraising and Grants	141,921	7,637	7,604	288,225	287,000	288,225	1,225	-
<b>Total Revenue</b>	<b>366,527</b>	<b>71,188</b>	<b>89,561</b>	<b>1,826,224</b>	<b>1,966,107</b>	<b>2,261,117</b>	<b>295,010</b>	<b>434,893</b>
<b>Expenses</b>								
Compensation and Benefits	90,658	90,433	86,750	1,053,068	1,149,429	1,053,068	96,362	(0)
Books and Supplies	11,507	12,036	27,675	157,997	137,878	157,997	(20,118)	-
Services and Other Operating Expenditures	53,271	80,770	133,435	696,217	616,590	701,275	(84,686)	5,059
Capital Outlay	-	-	(6,500)	-	15,000	-	15,000	-
<b>Total Expenses</b>	<b>155,437</b>	<b>183,240</b>	<b>241,361</b>	<b>1,907,281</b>	<b>1,918,897</b>	<b>1,912,340</b>	<b>6,557</b>	<b>5,059</b>
<b>Operating Income (excluding Depreciation)</b>	<b>211,090</b>	<b>(112,051)</b>	<b>(151,799)</b>	<b>(81,057)</b>	<b>47,209</b>	<b>348,777</b>	<b>301,568</b>	
<i>Operating Income (including Depreciation)</i>	211,090	(112,051)	(158,299)	(81,057)	59,209	348,777	289,568	429,834
<b>Fund Balance</b>								
Beginning Balance (Unaudited)	346,842	557,932	445,881	368,639	-	368,639		
Operating Income (including Depreciation)	211,090	(112,051)	(158,299)	(81,057)	59,209	348,777		
<b>Ending Fund Balance (including Depreciation)</b>	<b>557,932</b>	<b>445,881</b>	<b>287,582</b>	<b>287,582</b>	<b>59,209</b>	<b>717,416</b>		

**Yu Ming Charter School**  
Budget vs. Actuals

As of most recent monthly close

	Actual			Budget vs. Actu	2013-14 Budget			
	Apr	May	Jun	Actual YTD	Approved 1st Interim Budget	Current Forecast	Variance (Budget vs. Current Forecast)	Forecast Remaining
<b>Detail</b>								
<b>Enrollment Summary</b>								
K-3					208	212	4	
<b>Total Enrolled</b>					<b>208</b>	<b>212</b>		
<b>ADA %</b>								
K-3					96%	98%		
<b>Average</b>					<b>96%</b>	<b>98%</b>		
<b>ADA</b>								
K-3					199.7	206.8		
<b>Total ADA</b>					<b>199.7</b>	<b>206.8</b>		

**Yu Ming Charter School**  
Budget vs. Actuals

As of most recent monthly close

		Actual			Budget vs. Actual	2013-14 Budget			
		Apr	May	Jun	Actual YTD	Approved 1st Interim Budget	Current Forecast	Variance (Budget vs. Current Forecast)	Forecast Remaining
<b>REVENUE</b>									
<b>General Purpose Entitlement</b>									
8011	Charter Schools General Purpose Entitlement - State Aid	89,027	51,449	-	819,534	976,540	1,009,232	-	-
8012	Education Protection Account	73,795	-	-	144,991	213,202	222,251	9,049	77,260
8019	State Aid - Prior Years	-	-	-	1	-	1	1	-
8096	Charter Schools in Lieu of Prop. Taxes	-	-	-	-	-	4,714	4,714	4,714
		162,822	51,449	-	964,526	1,189,742	1,236,198	46,456	271,672
<b>8100 Federal Revenue</b>									
8181	Special Education - Entitlement	-	-	-	-	-	19,431	19,431	19,431
<b>SUBTOTAL - Federal Income</b>		-	-	-	-	-	19,431	19,431	19,431
<b>8300 Other State Revenues</b>									
8319	Other State Apportionments - Prior Years	-	-	-	4,222	-	4,222	4,222	-
8381	Special Education - Entitlement (State)	19,144	-	-	72,118	93,833	99,112	5,279	26,994
8545	School Facilities Apportionments	-	-	-	-	90,000	97,995	7,995	97,995
8550	Mandated Cost Reimbursements	-	-	-	2,177	2,796	2,177	(619)	-
8560	State Lottery Revenue	6,912	-	-	13,052	30,751	31,853	1,103	18,801
8590	All Other State Revenue (Common Core)	-	-	-	31,953	31,800	31,953	153	-
8594	Prop 39 CA Clean Energy Jobs Act	-	-	-	50,269	-	50,269	50,269	-
<b>SUBTOTAL - Other State Income</b>		26,056	-	1,694	173,792	249,179	317,582	68,402	143,790
<b>8600 Other Local Revenue</b>									
8634	Food Service Sales	3,122	4,731	455	61,107	43,488	61,107	17,619	-
8636	Uniforms	10	-	40	412	350	412	62	-
8660	Interest	-	-	26	26	-	26	26	-
8676	After School Program Revenue	41,145	7,348	79,722	323,711	179,716	323,711	143,994	-
8693	Field Trips	-	23	-	12,632	13,485	12,632	(854)	-
8699	All Other Local Revenue	513	-	20	1,794	3,145	1,794	(1,352)	-
8999	Uncategorized Revenue	(9,063)	(0)	-	0	-	0	0	-
<b>SUBTOTAL - Local Revenues</b>		35,728	12,103	80,264	399,681	240,185	399,681	159,496	-
<b>8800 Donations/Fundraising</b>									
8801	Individual Donations	4,013	218	211	61,464	83,600	61,464	(22,136)	-
8802	Corporations/Foundations	387	1,609	985	23,339	25,750	23,339	(2,411)	-
8803	Events	137,522	5,810	6,407	203,421	177,650	203,421	25,771	-
<b>SUBTOTAL - Fundraising and Grants</b>		141,921	7,637	7,604	288,225	287,000	288,225	1,225	-
<b>TOTAL REVENUE</b>		<b>366,527</b>	<b>71,188</b>	<b>89,561</b>	<b>1,826,224</b>	<b>1,966,107</b>	<b>2,261,117</b>	<b>295,010</b>	<b>434,893</b>

**Yu Ming Charter School**  
Budget vs. Actuals

As of most recent monthly close

		<b>Actual</b>				<b>Budget vs. Actual</b>		<b>2013-14 Budget</b>		
		Apr	May	Jun	Actual YTD	Approved 1st Interim Budget	Current Forecast	Variance (Budget vs. Current Forecast)	Forecast Remaining	
<b>EXPENSES</b>										
<b>Compensation &amp; Benefits</b>										
1000	<b>Certificated Salaries</b>	-	-	-						
1100	Teachers Salaries	49,923	50,160	50,377	543,615	537,601	543,615	(6,015)	-	
1103	Teacher - Substitute Pay	-	-	-	-	-	-	-	-	
1300	Certificated Supervisor & Administrator Salaries	-	-	-	-	47,273	-	47,273	-	
1930	Other Cert - Counselor	-	-	-	23,819	45,000	23,819	21,181	-	
<b>SUBTOTAL - Certificated Employees</b>		<b>49,923</b>	<b>50,160</b>	<b>50,377</b>	<b>567,434</b>	<b>629,873</b>	<b>567,434</b>	<b>62,439</b>	<b>-</b>	
2000	<b>Classified Salaries</b>									
2100	Classified Instructional Aide Salaries	7,339	7,919	8,814	80,576	75,009	80,576	(5,567)	-	
2102	Classified - Counselors	-	-	-	-	-	-	-	-	
2300	Classified Supervisor & Administrator Salaries	14,858	14,858	14,858	177,258	175,481	177,258	(1,777)	-	
2900	Classified Other Salaries	-	-	-	-	-	-	-	-	
2905	Other Classified - After School	1,978	462	-	21,907	30,000	21,907	8,093	-	
2930	Other Classified - Maintenance/grounds	2,040	2,080	1,924	21,076	21,600	21,076	524	-	
<b>SUBTOTAL - Classified Employees</b>		<b>26,215</b>	<b>25,320</b>	<b>25,596</b>	<b>300,817</b>	<b>302,090</b>	<b>300,817</b>	<b>1,273</b>	<b>-</b>	
3000	<b>Employee Benefits</b>									
3100	STRS	4,337	4,416	4,504	46,719	47,831	46,719	1,112	-	
3300	OASDI-Medicare-Alternative	2,567	2,453	2,425	31,349	35,503	31,349	4,154	-	
3400	Health & Welfare Benefits	6,957	7,971	(137)	73,789	104,224	73,789	30,435	-	
3500	Unemployment Insurance	306	113	75	9,941	8,663	9,941	(1,279)	-	
3600	Workers Comp Insurance	-	-	3,402	21,448	21,245	21,448	(203)	-	
3900	Other Employee Benefits	354	-	507	1,569	-	1,569	(1,569)	-	
<b>SUBTOTAL - Employee Benefits</b>		<b>14,521</b>	<b>14,953</b>	<b>10,777</b>	<b>184,816</b>	<b>217,466</b>	<b>184,816</b>	<b>32,650</b>	<b>-</b>	

**Yu Ming Charter School**  
Budget vs. Actuals

As of most recent monthly close

		Actual			Budget vs. Actu	2013-14 Budget			
		Apr	May	Jun	Actual YTD	Approved 1st Interim Budget	Current Forecast	Variance (Budget vs. Current Forecast)	Forecast Remaining
<b>4000</b>	<b>Books &amp; Supplies</b>	-	-	-					
4100	Approved Textbooks & Core Curricula Materials	1,942	4,275	10,272	43,887	34,224	43,887	(9,663)	-
4200	Books & Other Reference Materials	434	63	339	1,205	-	1,205	(1,205)	-
4300	Materials & Supplies	-	-	1,122	1,122	-	1,122	(1,122)	-
4315	Custodial Supplies	149	485	54	2,362	3,000	2,362	638	-
4320	Educational Software	-	-	-	2,425	2,500	2,425	75	-
4325	Instructional Materials & Supplies	851	1,106	2,447	7,297	-	7,297	(7,297)	-
4326	Art & Music Supplies	25	-	-	28	2,000	28	1,972	-
4330	Office Supplies	741	-	255	2,135	7,379	2,135	5,244	-
4335	PE Supplies	-	-	131	1,151	1,500	1,151	349	-
4345	After School Supplies	207	-	190	1,370	3,120	1,370	1,750	-
4346	Teacher Supplies	466	329	912	7,651	10,400	7,651	2,749	-
4350	Uniforms	-	-	47	487	1,040	487	553	-
4410	Classroom Furniture, Equipment & Supplies	-	-	-	2,525	4,900	2,525	2,375	-
4420	Computers (individual items less than \$5k)	-	-	-	19,403	20,000	19,403	597	-
4430	Non Classroom Related Furniture, Equipment & Supplies	-	-	-	-	600	-	600	-
4435	Office first aid supplies	114	244	225	1,167	840	1,167	(327)	-
4710	Student Food Services	6,578	5,534	11,086	62,012	44,376	62,012	(17,636)	-
4720	Other Food	-	-	594	1,772	2,000	1,772	228	-
	<b>SUBTOTAL - Books and Supplies</b>	<b>11,507</b>	<b>12,036</b>	<b>27,675</b>	<b>157,997</b>	<b>137,878</b>	<b>157,997</b>	<b>(20,118)</b>	<b>-</b>

**Yu Ming Charter School**  
Budget vs. Actuals

As of most recent monthly close

	Actual				Budget vs. Actual		2013-14 Budget	
	Apr	May	Jun	Actual YTD	Approved 1st Interim Budget	Current Forecast	Variance (Budget vs. Current Forecast)	Forecast Remaining
<b>5000</b>	<b>Services &amp; Other Operating Expenses</b>							
5210	-	45	-	855	7,906	855	7,051	-
5220	20	66	263	1,731	3,163	1,731	1,432	-
5305	-	-	-	1,105	1,298	1,105	193	-
5450	-	-	4,732	16,953	18,720	16,953	1,767	-
5510	-	-	1,084	8,029	7,428	8,029	(601)	-
5515	278	600	391	3,592	1,200	3,592	(2,392)	-
5520	-	-	-	4,959	5,000	4,959	41	-
5525	412	412	652	4,933	2,349	4,933	(2,584)	-
5530	-	1,107	476	4,130	2,500	4,130	(1,630)	-
5535	-	-	-	-	14,400	-	14,400	-
5605	685	685	799	6,306	5,000	6,306	(1,306)	-
5610	10,300	10,300	10,300	121,800	120,000	121,800	(1,800)	-
5611	-	-	-	-	-	-	-	-
5615	-	424	6,500	8,543	7,000	8,543	(1,543)	-
5617	-	-	-	-	624	-	624	-
5803	-	-	35	35	8,000	35	7,965	-
5809	-	-	-	302	100	302	(202)	-
5812	6,500	1,215	6,500	78,000	78,000	78,000	(0)	-
5819	-	-	6,950	6,950	-	6,950	(6,950)	-
5820	-	-	-	-	5,000	-	5,000	-
5824	-	9,228	9,880	32,027	35,692	37,086	(1,394)	5,059
5830	2,247	1,968	541	14,983	14,984	14,983	0	-
5834	4,073	570	464	7,188	-	7,188	(7,188)	-
5836	-	102	25	510	1,333	510	823	-
5839	-	68	70	2,627	10,300	2,627	7,673	-
5843	-	-	-	601	475	601	(126)	-
5845	-	4,810	5,817	28,571	50,000	28,571	21,429	-
5851	-	(350)	-	1,473	2,300	1,473	827	-
5854	5,567	6,622	25,607	57,827	26,690	57,827	(31,137)	-
5855	4,085	8,470	8,512	90,100	91,267	90,100	1,167	-
5856	-	-	-	-	-	-	-	-
5857	156	141	138	2,146	4,200	2,146	2,054	-
5860	883	1,686	1,745	13,796	11,440	13,796	(2,356)	-
5861	-	-	-	-	2,175	-	2,175	-
5863	1,205	11,293	2,286	38,762	28,665	38,762	(10,097)	-
5872	14,400	19,157	34,435	104,639	20,000	104,639	(84,639)	-
5875	-	-	2,437	5,542	4,000	5,542	(1,542)	-
5878	-	172	862	7,179	2,667	7,179	(4,513)	-
5881	-	-	345	345	5,918	345	5,573	-
5884	1,542	1,047	804	9,285	7,906	9,285	(1,379)	-
5899	313	(145)	90	2,791	2,500	2,791	(291)	-
5910	603	626	172	3,411	1,704	3,411	(1,707)	-
5915	5	-	78	339	667	339	328	-
5920	-	453	447	3,851	4,020	3,851	169	-
<b>SUBTOTAL - Services &amp; Other Operating Exp.</b>	<b>53,271</b>	<b>80,770</b>	<b>133,435</b>	<b>696,217</b>	<b>616,590</b>	<b>701,275</b>	<b>(84,686)</b>	<b>5,059</b>

**Yu Ming Charter School**  
Budget vs. Actuals

As of most recent monthly close

		<b>Actual</b>				<b>Budget vs. Actual</b>		<b>2013-14 Budget</b>	
		Apr	May	Jun	Actual YTD	Approved 1st Interim Budget	Current Forecast	Variance (Budget vs. Current Forecast)	Forecast Remaining
<b>6000</b>	<b>Capital Outlay</b>								
6200	Buildings & Improvement of Buildings	-	-	(6,500)	-	15,000	-	15,000	-
	<b>SUBTOTAL - Capital Outlay</b>	-	-	<b>(6,500)</b>	-	<b>15,000</b>	-	<b>15,000</b>	-
	<b>TOTAL EXPENSES</b>	<b>155,437</b>	<b>183,240</b>	<b>241,361</b>	<b>1,907,281</b>	<b>1,918,897</b>	<b>1,912,340</b>	<b>6,557</b>	<b>5,059</b>
<b>6900</b>	<b>Total Depreciation (includes Prior Years)</b>	-	-	-	-	<b>3,000</b>	-	<b>3,000</b>	-
	<b>TOTAL EXPENSES including Depreciation</b>	<b>155,437</b>	<b>183,240</b>	<b>247,861</b>	<b>1,907,281</b>	<b>1,906,897</b>	<b>1,912,340</b>	<b>(5,443)</b>	<b>5,059</b>



**Yu Ming Charter School**  
Budget vs. Actuals

As of August 2014

	Actual		Budget vs. Actual			2014-15 Budget			
	Jul	Aug	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Current Forecast	(Budget vs. Current Forecast)	Forecast Remaining
<b>SUMMARY</b>									
<b>Revenue</b>									
General Block Grant	-	56,201	56,201	67,037	(10,836)	1,621,875	1,632,436	10,561	1,576,235
Federal Revenue	-	-	-	1,130	(1,130)	22,597	22,597	-	22,597
Other State Revenues	-	5,031	5,031	5,508	(477)	241,375	241,375	-	236,344
Local Revenues	14,113	19,589	33,702	-	33,702	114,171	114,171	-	80,469
Fundraising and Grants	208	4,560	4,768	-	4,768	311,000	311,000	-	306,232
<b>Total Revenue</b>	<b>14,321</b>	<b>85,382</b>	<b>99,702</b>	<b>73,674</b>	<b>26,028</b>	<b>2,311,019</b>	<b>2,321,580</b>	<b>10,561</b>	<b>2,221,877</b>
<b>Expenses</b>									
Compensation and Benefits	35,162	122,717	157,879	181,383	23,504	1,518,674	1,518,674	-	1,360,796
Books and Supplies	-	13,331	13,331	50,276	36,946	158,539	160,629	(2,090)	147,299
Services and Other Operating Expenditures	48,307	27,264	75,571	52,116	(23,455)	770,569	761,256	9,314	685,684
Capital Outlay	-	21,912	21,912	-	(21,912)	15,000	25,000	(10,000)	3,088
<b>Total Expenses</b>	<b>83,469</b>	<b>185,224</b>	<b>268,693</b>	<b>283,776</b>	<b>15,083</b>	<b>2,462,783</b>	<b>2,465,559</b>	<b>(2,776)</b>	<b>2,196,867</b>
<b>Operating Income (excluding Depreciation)</b>	<b>(69,148)</b>	<b>(99,842)</b>	<b>(168,990)</b>	<b>(210,101)</b>	<b>41,111</b>	<b>(151,764)</b>	<b>(143,980)</b>	<b>7,785</b>	<b>25,011</b>
<i>Operating Income (including Depreciation)</i>	(69,148)	(77,930)	(147,078)	(210,101)	63,023	(141,064)	(125,280)	15,785	21,799
<b>Fund Balance</b>									
Beginning Balance (Unaudited)	717,416	648,267	717,416	717,416		717,416	717,416		
Audit Adjustment	-	-	-	-		-	-		
Beginning Balance (Audited)	717,416		717,416	717,416		717,416	717,416		
Operating Income (including Depreciation)	(69,148)	(77,930)	(147,078)	(210,101)		(141,064)	(125,280)		
<b>Ending Fund Balance (including Depreciation)</b>	<b>648,267</b>	<b>570,337</b>	<b>570,337</b>	<b>507,314</b>		<b>576,351</b>	<b>592,136</b>		

**Yu Ming Charter School**  
Budget vs. Actuals

As of August 2014

	Actual		Budget vs. Actual			2014-15 Budget			
	Jul	Aug	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Current Forecast	(Budget vs. Current Forecast)	Forecast Remaining
<b>Detail</b>									
<b>Enrollment Summary</b>									
K-3						-	-	-	
4-6						210	210	-	
7-8						51	51	-	
9-12						-	-	-	
<b>Total Enrolled</b>						<b>261</b>	<b>261</b>		
<b>ADA %</b>									
K-3						96%	96%		
4-6						96%	96%		
7-8						90%	90%		
9-12						90%	90%		
<b>Average</b>						<b>96%</b>	<b>96%</b>		
<b>ADA</b>									
K-3						201.6	201.6		
4-6						49.0	49.0		
7-8						0.0	0.0		
9-12						0.0	0.0		
<b>Total ADA</b>						<b>250.6</b>	<b>250.6</b>		

**Yu Ming Charter School**  
Budget vs. Actuals

As of August 2014

		Actual		Budget vs. Actual			2014-15 Budget			
		Jul	Aug	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Current Forecast	(Budget vs. Current Forecast)	Forecast Remaining
<b>REVENUE</b>										
<b>General Purpose Entitlement</b>										
8011	Charter Schools General Purpose Entitlement - State Aid	-	56,201	56,201	67,037	(10,836)	1,340,736	1,351,297	-	-
8012	Education Protection Account Entitlement	-	-	-	-	-	281,139	281,139	-	281,139
		-	56,201	56,201	67,037	(10,836)	1,621,875	1,632,436	10,561	1,576,235
<b>8100</b>	<b>Federal Revenue</b>	-	-	-	-	-	-	-	-	-
8181	Special Education - Entitlement	-	-	-	1,130	(1,130)	22,597	22,597	-	22,597
	<b>SUBTOTAL - Federal Income</b>	-	-	-	1,130	(1,130)	22,597	22,597	-	22,597
<b>8300</b>	<b>Other State Revenues</b>	-	-	-	-	-	-	-	-	-
8381	Special Education - Entitlement (State)	-	5,031	5,031	5,508	(477)	110,152	110,152	-	105,121
8545	School Facilities Apportionments	-	-	-	-	-	92,700	92,700	-	92,700
8560	State Lottery Revenue	-	-	-	-	-	38,524	38,524	-	38,524
8590	All Other State Revenue	-	-	-	-	-	-	-	-	-
	<b>SUBTOTAL - Other State Income</b>	-	5,031	5,031	5,508	(477)	241,375	241,375	-	236,344
<b>8600</b>	<b>Other Local Revenue</b>	-	-	-	-	-	-	-	-	-
8634	Food Service Sales	-	33,572	33,572	-	33,572	68,332	68,332	-	34,760
8636	Uniforms	-	130	130	-	130	383	383	-	253
8676	After School Program Revenue	-	-	-	-	-	26,200	26,200	-	26,200
8693	Field Trips	-	-	-	-	-	17,429	17,429	-	17,429
8699	All Other Local Revenue	-	-	-	-	-	1,827	1,827	-	1,827
8999	Uncategorized Revenue	14,113	(14,113)	-	-	-	-	-	-	-
	<b>SUBTOTAL - Local Revenues</b>	14,113	19,589	33,702	-	33,702	114,171	114,171	-	80,469
<b>8800</b>	<b>Donations/Fundraising</b>	-	-	-	-	-	-	-	-	-
8801	Donations - Parents	-	22	22	-	22	89,250	89,250	-	89,228
8802	Donations - Private	208	4,538	4,746	-	4,746	52,200	52,200	-	47,454
8803	Fundraising	-	-	-	-	-	169,550	169,550	-	169,550
	<b>SUBTOTAL - Fundraising and Grants</b>	208	4,560	4,768	-	4,768	311,000	311,000	-	306,232
<b>TOTAL REVENUE</b>		<b>14,321</b>	<b>85,382</b>	<b>99,702</b>	<b>73,674</b>	<b>26,028</b>	<b>2,311,019</b>	<b>2,321,580</b>	<b>10,561</b>	<b>2,221,877</b>

**Yu Ming Charter School**  
Budget vs. Actuals

As of August 2014

		Actual		Budget vs. Actual			2014-15 Budget			
		Jul	Aug	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Current Forecast	(Budget vs. Current Forecast)	Forecast Remaining
<b>EXPENSES</b>										
<b>Compensation &amp; Benefits</b>										
1000	<b>Certificated Salaries</b>	-	-							
1100	Teachers Salaries	-	72,011	72,011	68,684	(3,327)	755,519	755,519	-	683,508
1148	Teacher - Special Ed	-	-	-	2,844	2,844	31,280	31,280	-	31,280
1300	Certificated Supervisor & Administrator Salaries	7,333	7,333	14,667	8,000	(6,667)	88,000	88,000	-	73,333
1930	Other Cert - Counselor	-	2,091	2,091	2,091	(0)	23,000	23,000	-	20,909
<b>SUBTOTAL - Certificated Employees</b>		<b>7,333</b>	<b>81,435</b>	<b>88,768</b>	<b>81,618</b>	<b>(7,150)</b>	<b>897,799</b>	<b>897,799</b>	<b>-</b>	<b>809,031</b>
2000	<b>Classified Salaries</b>									
2100	Classified Instructional Aide Salaries	40	10,519	10,559	11,364	804	125,000	125,000	-	114,441
2300	Classified Supervisor & Administrator Salaries	15,775	15,775	31,550	31,488	(62)	188,926	188,926	-	157,376
2930	Other Classified - Maintenance/grounds	927	1,487	2,414	3,672	1,258	22,032	22,032	-	19,618
<b>SUBTOTAL - Classified Employees</b>		<b>16,742</b>	<b>27,781</b>	<b>44,523</b>	<b>46,523</b>	<b>2,000</b>	<b>335,958</b>	<b>335,958</b>	<b>-</b>	<b>291,435</b>
3000	<b>Employee Benefits</b>									
3100	STRS	655	6,868	7,523	5,880	(1,643)	64,684	64,684	-	57,161
3200	PERS	-	-	-	-	-	-	-	-	-
3300	OASDI-Medicare-Alternative	1,391	3,278	4,669	4,825	155	49,402	49,402	-	44,733
3400	Health & Welfare Benefits	7,563	477	8,040	34,742	26,701	138,966	138,966	-	130,926
3500	Unemployment Insurance	343	1,743	2,086	1,190	(896)	11,900	11,900	-	9,814
3600	Workers Comp Insurance	1,134	1,134	2,268	6,362	4,093	18,506	18,506	-	16,238
3900	Other Employee Benefits	-	-	-	243	243	1,458	1,458	-	1,458
<b>SUBTOTAL - Employee Benefits</b>		<b>11,086</b>	<b>13,501</b>	<b>24,587</b>	<b>53,241</b>	<b>28,654</b>	<b>284,917</b>	<b>284,917</b>	<b>-</b>	<b>260,330</b>

**Yu Ming Charter School**  
Budget vs. Actuals

As of August 2014

	Actual		Budget vs. Actual			2014-15 Budget			Forecast Remaining
	Jul	Aug	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Current Forecast	(Budget vs. Current Forecast)	
<b>4000 Books &amp; Supplies</b>									
4100 Approved Textbooks & Core Curricula Materials	-	1,531	1,531	19,733	18,202	37,000	27,000	10,000	25,469
4315 Custodial Supplies	-	718	718	1,648	930	3,090	3,090	-	2,372
4320 Educational Software	-	-	-	3,467	3,467	6,500	6,500	-	6,500
4325 Instructional Materials & Supplies	-	4,455	4,455	-	(4,455)	-	10,000	(10,000)	5,545
4326 Art & Music Supplies	-	-	-	16	16	29	29	-	29
4330 Office Supplies	-	700	700	1,361	662	8,168	8,168	-	7,469
4335 PE Supplies	-	38	38	824	786	1,545	1,545	-	1,507
4346 Teacher Supplies	-	509	509	2,240	1,732	13,442	13,442	-	12,933
4350 Uniforms	-	275	275	717	442	1,344	1,344	-	1,069
4410 Classroom Furniture, Equipment & Supplies	-	-	-	2,958	2,958	5,546	6,254	(708)	6,254
4420 Computers (individual items less than \$5k)	-	2,245	2,245	5,333	3,088	10,000	10,000	-	7,755
4430 Non Classroom Related Furniture, Equipment & Supplies	-	1,594	1,594	103	(1,491)	618	2,000	(1,382)	406
4435 Office first aid supplies	-	-	-	144	144	865	865	-	865
4710 Student Food Services	-	-	-	11,389	11,389	68,332	68,332	-	68,332
4720 Other Food	-	1,266	1,266	343	(923)	2,060	2,060	-	794
<b>SUBTOTAL - Books and Supplies</b>	<b>-</b>	<b>13,331</b>	<b>13,331</b>	<b>50,276</b>	<b>36,946</b>	<b>158,539</b>	<b>160,629</b>	<b>(2,090)</b>	<b>147,299</b>

**Yu Ming Charter School**  
Budget vs. Actuals

As of August 2014

	Actual		Budget vs. Actual			2014-15 Budget			
	Jul	Aug	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Current Forecast	(Budget vs. Current Forecast)	Forecast Remaining
<b>5000</b>	<b>Services &amp; Other Operating Expenses</b>								
5200	-	-	-	-	-	8,000	8,000	-	8,000
5300	-	-	-	-	-	1,678	1,678	-	1,678
5450	1,577	1,577	3,155	6,875	3,720	20,000	20,000	-	16,845
5510	221	405	625	1,275	650	7,651	7,651	-	7,026
5515	-	186	186	-	(186)	21,600	21,600	-	21,414
5520	917	95	1,012	-	(1,012)	5,150	5,150	-	4,138
5525	299	899	1,197	1,017	(180)	6,104	6,104	-	4,906
5530	119	-	119	753	634	4,516	4,516	-	4,398
5535	-	-	-	2,966	2,966	17,798	17,798	-	17,798
5605	570	747	1,318	-	(1,318)	6,378	6,378	-	5,060
5610	10,300	10,300	20,600	25,767	5,167	154,600	154,600	-	134,000
5611	-	-	-	1,667	1,667	10,000	-	10,000	-
5615	-	85	85	-	(85)	8,652	8,652	-	8,567
5617	-	175	175	-	(175)	1,045	1,045	-	870
5803	-	-	-	-	-	8,240	8,240	-	8,240
5809	-	-	-	-	-	515	515	-	515
5812	5,114	5,114	10,227	10,226	(1)	61,358	61,728	(370)	51,501
5820	-	-	-	-	-	5,150	5,150	-	5,150
5824	-	-	-	-	-	48,656	48,973	(317)	48,973
5830	-	-	-	-	-	19,366	19,366	-	19,366
5834	-	-	-	-	-	7,210	7,210	-	7,210
5836	109	71	180	-	(180)	1,723	1,723	-	1,543
5839	70	70	140	-	(140)	10,609	10,609	-	10,469

**Yu Ming Charter School**  
Budget vs. Actuals

As of August 2014

	Actual		Budget vs. Actual			2014-15 Budget					
	Jul	Aug	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Current Forecast	(Budget vs. Current Forecast)	Forecast Remaining		
5843	-	-	-	-	-	260	260	-	260		
5845	-	3,020	3,020	-	(3,020)	20,000	20,000	-	16,980		
5851	375	-	375	-	(375)	4,000	4,000	-	3,625		
5853	-	-	-	-	-	1,000	1,000	-	1,000		
5854	-	-	-	-	-	70,000	70,000	-	70,000		
5857	119	200	319	-	(319)	4,326	4,326	-	4,008		
5860	-	169	169	-	(169)	16,533	16,533	-	16,364		
5863	-	615	615	-	(615)	32,000	32,000	-	31,385		
5864	-	-	-	-	-	9,000	9,000	-	9,000		
5872	-	2,071	2,071	-	(2,071)	100,224	100,224	-	98,153		
5875	465	164	629	-	(629)	4,120	4,120	-	3,491		
5878	-	-	-	-	-	9,409	9,409	-	9,409		
5881	-	-	-	-	-	6,095	6,095	-	6,095		
5884	-	-	-	-	-	14,007	14,007	-	14,007		
5899	120	458	578	-	(578)	2,575	2,575	-	1,997		
5910	1,093	141	1,234	736	(497)	4,419	4,419	-	3,185		
5915	-	51	51	144	93	862	862	-	811		
5920	-	414	414	690	276	4,141	4,141	-	3,727		
<b>SUBTOTAL - Services &amp; Other Operating Exp.</b>			<b>48,307</b>	<b>27,264</b>	<b>75,571</b>	<b>52,116</b>	<b>(23,455)</b>	<b>770,569</b>	<b>761,256</b>	<b>9,314</b>	<b>685,684</b>
<hr/>											
<b>6000</b>	<b>Capital Outlay</b>										
6100	-	21,912	21,912	-	(21,912)	15,000	25,000	(10,000)	3,088		
<b>SUBTOTAL - Capital Outlay</b>			<b>-</b>	<b>21,912</b>	<b>21,912</b>	<b>-</b>	<b>(21,912)</b>	<b>15,000</b>	<b>25,000</b>	<b>(10,000)</b>	<b>3,088</b>
<hr/>											
<b>TOTAL EXPENSES</b>			<b>83,469</b>	<b>185,224</b>	<b>268,693</b>	<b>283,776</b>	<b>15,083</b>	<b>2,462,783</b>	<b>2,465,559</b>	<b>(2,776)</b>	<b>2,196,867</b>
<hr/>											
<b>6900</b>	<b>Total Depreciation (includes Prior Years)</b>										
	-	-	-	-	-	4,300	6,300	(2,000)	6,300		
<hr/>											
<b>TOTAL EXPENSES including Depreciation</b>			<b>83,469</b>	<b>163,312</b>	<b>246,781</b>	<b>283,776</b>	<b>36,995</b>	<b>2,452,083</b>	<b>2,446,859</b>	<b>5,224</b>	<b>2,200,079</b>

**Yu Ming Charter School**  
Monthly Cash Forecast  
As of most recent monthly close

	2014/15													Forecast	AP/AR
	Actual & Projected														
	Jul Actual	Aug Actual	Sep Projected	Oct Projected	Nov Projected	Dec Projected	Jan Projected	Feb Projected	Mar Projected	Apr Projected	May Projected	Jun Projected			
<b>Beginning Cash</b>	<b>463,742</b>	<b>538,263</b>	<b>521,528</b>	<b>361,497</b>	<b>527,598</b>	<b>481,526</b>	<b>382,194</b>	<b>387,102</b>	<b>309,685</b>	<b>279,714</b>	<b>374,819</b>	<b>372,019</b>			
<b>Revenue</b>															
General Block Grant	-	56,201	45,571	261,731	91,208	91,208	202,697	91,208	124,155	224,340	124,611	124,611	1,632,436	194,896	
Federal Income	-	-	-	-	-	-	-	-	4,519	4,519	4,519	4,519	22,597	4,519	
Other State Income	-	5,031	(5,031)	-	46,350	-	-	25,000	22,030	45,205	47,030	22,030	241,375	33,729	
Local Revenues	14,113	19,589	32,634	3,132	3,132	9,682	3,132	3,132	9,682	3,132	3,132	9,682	114,171	-	
Fundraising and Grants	208	4,560	26,332	31,100	31,100	31,100	31,100	31,100	31,100	31,100	31,100	31,100	311,000	-	
<b>Total Revenue</b>	<b>14,321</b>	<b>85,382</b>	<b>99,505</b>	<b>295,963</b>	<b>171,790</b>	<b>131,990</b>	<b>236,929</b>	<b>150,440</b>	<b>191,486</b>	<b>308,296</b>	<b>210,392</b>	<b>191,942</b>	<b>2,321,580</b>	<b>233,144</b>	
<b>Expenses</b>															
Compensation & Benefits	35,162	122,717	162,006	134,932	134,337	134,337	139,097	134,932	134,932	132,602	132,602	121,021	1,518,674	-	
Books & Supplies	-	13,331	57,496	9,978	9,978	9,978	9,978	9,978	9,978	9,978	9,978	9,978	160,629	-	
Services & Other Operating Expenses	48,307	27,264	49,030	70,030	70,030	74,090	70,030	70,030	74,047	68,112	68,112	72,172	761,256	-	
Capital Outlay	-	21,912	(19,412)	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	25,000	-	
<b>Total Expenses</b>	<b>83,469</b>	<b>185,224</b>	<b>249,120</b>	<b>217,440</b>	<b>216,845</b>	<b>220,905</b>	<b>221,605</b>	<b>217,440</b>	<b>221,457</b>	<b>213,192</b>	<b>213,192</b>	<b>205,671</b>	<b>2,465,559</b>	-	
<b>Operating Cash Inflow (Outflow)</b>	<b>(69,148)</b>	<b>(99,842)</b>	<b>(149,614)</b>	<b>78,523</b>	<b>(45,055)</b>	<b>(88,915)</b>	<b>15,324</b>	<b>(67,000)</b>	<b>(29,970)</b>	<b>95,104</b>	<b>(2,800)</b>	<b>(13,729)</b>	<b>(143,980)</b>	<b>233,144</b>	
Revenues - Prior Year Accruals	204,878	106,667	-	97,995	9,400	-	-	-	-	-	-	-	-	-	
Expenses - Prior Year Accruals	(1,032)	(731)	-	-	-	-	-	-	-	-	-	-	-	-	
Accounts Receivable - Current Year	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Accounts Payable - Current Year	(67,664)	(22,828)	-	-	-	-	-	-	-	-	-	-	-	-	
Summerholdback for Teachers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Loans Payable (Current)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Loans Payable (Long Term)	-	-	(10,417)	(10,417)	(10,417)	(10,417)	(10,417)	(10,417)	-	-	-	-	-	-	
Capital Leases Payable	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other Long Term Debt	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Capital Expenditure & Depreciation	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other Balance Sheet Changes	7,487	-	-	-	-	-	-	-	-	-	-	-	-	-	
<b>Ending Cash</b>	<b>538,263</b>	<b>521,528</b>	<b>361,497</b>	<b>527,598</b>	<b>481,526</b>	<b>382,194</b>	<b>387,102</b>	<b>309,685</b>	<b>279,714</b>	<b>374,819</b>	<b>372,019</b>	<b>358,290</b>			





**Board of Directors**  
**Thursday, September 18, 2014**  
**AGENDA ITEM INFORMATION**

<b>Agenda Item</b>	Finance – Unaudited 2013-2014 Financials
<b>Time Allotted</b>	10 minutes
<b>Summary</b>	The Board is required to review, approve and submit unaudited financials to ACOE.
<b>Type</b>	Decision
<b>Background</b>	EdTec has prepared a report of unaudited financials for the previous fiscal year (July 1, 2013 - June 30, 2014) in accordance with requirements provided by Alameda County Office of Education (our charter authorizer).
<b>Key Questions</b>	<ul style="list-style-type: none"><li>•</li></ul>
<b>Attachments</b>	<ul style="list-style-type: none"><li>• YMCS 2013-2014 Certification</li><li>• YMCS 2013-2014 Alt Form</li><li>• YMCS 2013-2014 Unaudited Actuals Submission Checklist</li></ul>

CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM  
July 1, 2013 to June 30, 2014

CHARTER SCHOOL CERTIFICATION

Charter School Name: Yu Ming Charter School  
CDS #: 01100170124172  
Charter Approving Entity: Alameda County Office of Education  
County: Alameda  
Charter #: 1296

**NOTE: An Alternative Form submitted to the California Department of Education will not be considered a valid submission if the following information is missing:**

For information regarding this report, please contact:

For Approving Entity:

For Charter School:

Gail Greely  
Name

Yoon Chang  
Name

Director, Charter School Office  
Title

Client Manager  
Title

510-670-4234  
Telephone

510-663-3500 x348  
Telephone

ggreely@acoe.org  
E-mail address

yoony@edtec.com  
E-mail address

To the entity that approved the charter school:

(  ) 2013-14 CHARTER SCHOOL UNAUDITED ACTUALS FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been approved, and is hereby filed by the charter school pursuant to *Education Code* Section 42100(b).

Signed: \_\_\_\_\_  
Charter School Official  
(Original signature required)

Date: \_\_\_\_\_

Printed  
Name: Laura Ross

Title: Principal

To the County Superintendent of Schools:

(  ) 2013-14 CHARTER SCHOOL UNAUDITED ACTUALS FINANCIAL REPORT -- ALTERNATIVE FORM: This report is hereby filed with the County Superintendent pursuant to *Education Code* Section 42100(a).

Signed: \_\_\_\_\_  
Authorized Representative of  
Charter Approving Entity  
(Original signature required)

Date: \_\_\_\_\_

Printed  
Name: Gail Greely

Title: Director

To the Superintendent of Public Instruction:

(  ) 2013-14 CHARTER SCHOOL UNAUDITED ACTUALS FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been verified for mathematical accuracy by the County Superintendent of Schools pursuant to *Education Code* Section 42100(a).

Signed: \_\_\_\_\_  
County Superintendent/Designee  
(Original signature required)

Date: \_\_\_\_\_

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

**July 1, 2013 to June 30, 2014**

Charter School Name: Yu Ming Charter School

CDS #: 01100170124172

Charter Approving Entity: Alameda County Office of Education

County: Alameda

Charter #: 1296

**This charter school uses the following basis of accounting:**

**(Please enter an "X" in the applicable box below; check only one box)**

- Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 7438, 9400-9489, 9660-9669, 9796, and 9797)
- Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 7438, 7439, and 9711-9789)

Description	Object Code	Unrestricted	Restricted	Total
<b>A. REVENUES</b>				
<b>1. LCFF Sources</b>				
State Aid - Current Year	8011	1,009,232.00		1,009,232.00
Education Protection Account State Aid - Current Year	8012	222,251.00		222,251.00
State Aid - Prior Years	8019	1.40		1.40
Transfers to Charter Schools in Lieu of Property Taxes	8096	4,714.00		4,714.00
Other LCFF Transfers	8091, 8097			0.00
Total, LCFF Sources		1,236,198.40	0.00	1,236,198.40
<b>2. Federal Revenues (see NOTE in Section L)</b>				
No Child Left Behind	8290			0.00
Special Education - Federal	8181, 8182		19,431.00	19,431.00
Child Nutrition - Federal	8220			0.00
Other Federal Revenues	8110, 8260-8299			0.00
Total, Federal Revenues		0.00	19,431.00	19,431.00
<b>3. Other State Revenues</b>				
Special Education - State	StateRevSE		99,112.00	99,112.00
All Other State Revenues	StateRevAO	134,475.94	83,993.79	218,469.73
Total, Other State Revenues		134,475.94	183,105.79	317,581.73
<b>4. Other Local Revenues</b>				
All Other Local Revenues	LocalRevAO	687,905.90		687,905.90
Total, Local Revenues		687,905.90	0.00	687,905.90
<b>5. TOTAL REVENUES</b>				
		2,058,580.24	202,536.79	2,261,117.03
<b>B. EXPENDITURES (see NOTE in Section L)</b>				
<b>1. Certificated Salaries</b>				
Certificated Teachers' Salaries	1100	543,615.15		543,615.15
Certificated Pupil Support Salaries	1200			0.00
Certificated Supervisors' and Administrators' Salaries	1300			0.00
Other Certificated Salaries	1900		23,819.24	23,819.24
Total, Certificated Salaries		543,615.15	23,819.24	567,434.39
<b>2. Noncertificated Salaries</b>				
Noncertificated Instructional Salaries	2100	80,576.32		80,576.32
Noncertificated Support Salaries	2200			0.00
Noncertificated Supervisors' and Administrators' Salaries	2300	177,258.05		177,258.05
Clerical and Office Salaries	2400			0.00
Other Noncertificated Salaries	2900	42,982.97		42,982.97
Total, Noncertificated Salaries		300,817.34	0.00	300,817.34

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2013 to June 30, 2014

Charter School Name: Yu Ming Charter School

CDS #: 01100170124172

Description	Object Code	Unrestricted	Restricted	Total
<b>3. Employee Benefits</b>				
STRS	3101-3102	44,911.16	1,961.13	46,872.29
PERS	3201-3202			0.00
OASDI / Medicare / Alternative	3301-3302	30,500.85	848.47	31,349.32
Health and Welfare Benefits	3401-3402	71,764.86	2,024.30	73,789.16
Unemployment Insurance	3501-3502	9,665.59	275.76	9,941.35
Workers' Compensation Insurance	3601-3602	20,859.34	588.39	21,447.73
OPEB, Allocated	3701-3702			0.00
OPEB, Active Employees	3751-3752			0.00
Other Employee Benefits	3901-3902	1,372.95	43.05	1,416.00
Total, Employee Benefits		179,074.75	5,741.10	184,815.85
<b>4. Books and Supplies</b>				
Approved Textbooks and Core Curricula Materials	4100	38,385.35	1,771.79	40,157.14
Books and Other Reference Materials	4200	3,063.84		3,063.84
Materials and Supplies	4300	15,637.43	12,260.89	27,898.32
Noncapitalized Equipment	4400	4,676.86	18,417.31	23,094.17
Food	4700	63,783.47		63,783.47
Total, Books and Supplies		125,546.95	32,449.99	157,996.94
<b>5. Services and Other Operating Expenditures</b>				
Subagreements for Services	5100			0.00
Travel and Conferences	5200	2,585.83		2,585.83
Dues and Memberships	5300	1,105.00		1,105.00
Insurance	5400	16,953.44		16,953.44
Operations and Housekeeping Services	5500	25,643.38		25,643.38
Rentals, Leases, Repairs, and Noncap. Improvements	5600	136,649.17		136,649.17
Professional/Consulting Services and Operating Expend.	5800	404,824.46	105,913.85	510,738.31
Communications	5900	7,600.23		7,600.23
Total, Services and Other Operating Expenditures		595,361.51	105,913.85	701,275.36
<b>6. Capital Outlay</b>				
(Objects 6100-6170, 6200-6500 modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Depreciation Expense (accrual basis only)	6900			0.00
Total, Capital Outlay		0.00	0.00	0.00
<b>7. Other Outgo</b>				
Tuition to Other Schools	7110-7143			0.00
Transfers of Pass-Through Revenues to Other LEAs	7211-7213			0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE			0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO			0.00
All Other Transfers	7281-7299			0.00
Debt Service:				
Interest	7438			0.00
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		0.00	0.00	0.00
Total, Other Outgo		0.00	0.00	0.00
<b>8. TOTAL EXPENDITURES</b>		1,744,415.70	167,924.18	1,912,339.88

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2013 to June 30, 2014

Charter School Name: Yu Ming Charter School

CDS #: 01100170124172

Description	Object Code	Unrestricted	Restricted	Total
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>		314,164.54	34,612.61	348,777.15
<b>D. OTHER FINANCING SOURCES / USES</b>				
1. Other Sources	8930-8979			0.00
2. Less: Other Uses	7630-7699			0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999			0.00
4. TOTAL OTHER FINANCING SOURCES / USES		0.00	0.00	0.00
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)</b>		314,164.54	34,612.61	348,777.15
<b>F. FUND BALANCE / NET POSITION</b>				
1. Beginning Fund Balance/Net Position				
a. As of July 1	9791	368,638.50		368,638.50
b. Adjustments/Restatements	9793, 9795			0.00
c. Adjusted Beginning Fund Balance /Net Position		368,638.50	0.00	368,638.50
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		682,803.04	34,612.61	717,415.65
Components of Ending Fund Balance (Modified Accrual Basis) (Optional)				
a. Nonspendable				
1. Revolving Cash (equals Object 9130)	9711			0.00
2. Stores (equals Object 9320)	9712			0.00
3. Prepaid Expenditures (equals Object 9330)	9713			0.00
4. All Others	9719			0.00
b. Restricted	9740			0.00
c. Committed				
1. Stabilization Arrangements	9750			0.00
2. Other Commitments	9760			0.00
d. Assigned	9780			0.00
e. Unassigned/Unappropriated				
1. Reserve for Economic Uncertainties	9789			0.00
2. Unassigned/Unappropriated Amount	9790M			0.00
3. Components of Ending Net Position (Accrual Basis)				
1. Net Investment in Capital Assets	9796			0.00
2. Restricted Net Position	9797		34,612.61	34,612.61
3. Unrestricted Net Position	9790A	682,803.04	0.00	682,803.04

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2013 to June 30, 2014

Charter School Name: Yu Ming Charter School

CDS #: 01100170124172

Description	Object Code	Unrestricted	Restricted	Total
<b>G. ASSETS</b>				
1. Cash				
In County Treasury	9110			0.00
Fair Value Adjustment to Cash in County Treasury	9111			0.00
In Banks	9120	429,129.03	34,612.61	463,741.64
In Revolving Fund	9130			0.00
With Fiscal Agent/Trustee	9135			0.00
Collections Awaiting Deposit	9140			0.00
2. Investments	9150			0.00
3. Accounts Receivable	9200	438,496.84		438,496.84
4. Due from Grantor Governments	9290			0.00
5. Stores	9320			0.00
6. Prepaid Expenditures (Expenses)	9330	7,487.09		7,487.09
7. Other Current Assets	9340	30,000.00		30,000.00
8. Capital Assets (accrual basis only)	9400-9489			0.00
9. TOTAL ASSETS		905,112.96	34,612.61	939,725.57
<b>H. DEFERRED OUTFLOWS OF RESOURCES</b>				
1. Deferred Outflows of Resources	9490			0.00
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00
<b>I. LIABILITIES</b>				
1. Accounts Payable	9500	97,309.92		97,309.92
2. Due to Grantor Governments	9590			0.00
3. Current Loans	9640			0.00
4. Unearned Revenue	9650			0.00
5. Long-Term Liabilities (accrual basis only)	9660-9669	125,000.00		125,000.00
6. TOTAL LIABILITIES		222,309.92	0.00	222,309.92
<b>J. DEFERRED INFLOWS OF RESOURCES</b>				
1. Deferred Inflows of Resources	9690			0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
<b>K. FUND BALANCE /NET POSITION</b>				
Ending Fund Balance /Net Position, June 30 (G9 + H2) - (I6 + J2) (must agree with Line F2)		682,803.04	34,612.61	717,415.65

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2013 to June 30, 2014

Charter School Name: Yu Ming Charter School

CDS #: 01100170124172

**L. FEDERAL NO CHILD LEFT BEHIND (NCLB) MAINTENANCE OF EFFORT REQUIREMENT**

**NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL NO CHILD LEFT BEHIND (NCLB) MAINTENANCE OF EFFORT REQUIREMENT:**

**1. Federal Revenue Used for Capital Outlay and Debt Service**

Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

Federal Program Name (If no amounts, indicate "NONE")	Capital Outlay	Debt Service	Total
a. None	\$ 0.00	0.00	0.00
b. _____			0.00
c. _____			0.00
d. _____			0.00
e. _____			0.00
f. _____			0.00
g. _____			0.00
h. _____			0.00
i. _____			0.00
j. _____			0.00
<b>TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

**2. Community Services Expenditures**

Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

Objects of Expenditures	Amount (Enter "0.00" if none)
a. Certificated Salaries 1000-1999	0.00
b. Noncertificated Salaries 2000-2999	0.00
c. Employee Benefits except 3801- 4000-4999	0.00
d. Books and Supplies 4000-4999	0.00
e. Services and Other Operating Expenditures 5000-5999	0.00
<b>TOTAL COMMUNITY SERVICES EXPENDITURES</b>	<b>0.00</b>

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

**July 1, 2013 to June 30, 2014**

Charter School Name: Yu Ming Charter School

CDS #: 01100170124172

**3. State and Local Expenditures to be Used for Annual NCLB Maintenance of Effort Calculation:**

Results of this calculation will be used for comparison with 2012-13 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis will result in reduction to allocations for covered programs in 2015-16.

a. Total Expenditures (B8)	<u>1,912,339.88</u>
b. Less Federal Expenditures (Total A2) [Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred]	<u>19,431.00</u>
c. Subtotal of State & Local Expenditures [a minus b]	<u>1,892,908.88</u>
d. Less Community Services [L2 Total]	<u>0.00</u>
e. Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total]	<u>0.00</u>
 TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE [c minus d minus e]	 <u>\$ 1,892,908.88</u>



**Alameda County Office of Education  
Charter Schools Office  
Unaudited Actuals Submission Checklist  
Fiscal Year 2013-14**

Charter School Name: Yu Ming Charter School

Date: 9/8/2014

We have developed this checklist to assist you in the submission of your Unaudited Actuals. Please return this completed checklist with your Submitted Packet. Thank you.

- Charter Schools Unaudited Actuals Alternative Form
- Completed Charter School Unaudited Actuals Certification Form - with Original Signatures
- Electronic Copy of Charter Schools Unaudited Actuals
- A financial Report from the computer system showing Balance Sheet with Revenue and Expenses
- Beginning Fund Balance matches/mirrors the 13/14 Ending Fund Balance by Unrestricted/Restricted
- Special Education Maintenance of Effort as submitted to SELPA (if applicable)*

**Comments:**

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**ESP-CA**  
**EdTec Network : Yu Ming Charter School (YMCS)**  
**Income Statement**  
**July 1, 2013 - June 30, 2014**

Financial Row	Amount
<b>Ordinary Income/Expense</b>	
<b>Income</b>	
<b>8000 - Revenue</b>	
<b>8010 - Principal Apportionment</b>	
8011 - Charter Schools General Purpose Entitlement - State Aid	\$1,009,232.00
8012 - Education Protection Account Entitlement	\$222,251.00
8019 - State Aid - Prior Years	\$1.40
8096 - Charter Schools in Lieu of Property Taxes	\$4,714.00
<b>Total - 8010 - Principal Apportionment</b>	<b>\$1,236,198.40</b>
<b>8100 - Federal Revenue</b>	
8181 - Special Education - Entitlement	\$19,431.00
<b>Total - 8100 - Federal Revenue</b>	<b>\$19,431.00</b>
<b>8300 - Other State Revenues</b>	
8319 - Other State Apportionments - Prior Years	\$4,222.41
<b>8380 - Special Ed</b>	
8381 - Special Education - Entitlement (State)	\$99,112.00
<b>Total - 8380 - Special Ed</b>	<b>\$99,112.00</b>
8545 - School Facilities Apportionments	\$97,994.96
8550 - Mandated Cost Reimbursements	\$2,177.00
8560 - State Lottery Revenue	\$31,853.36
<b>8590 - All Other State Revenue</b>	
8590 - All Other State Revenue	\$31,953.00
8594 - Other State Revenue 4	\$50,269.00
<b>Total - 8590 - All Other State Revenue</b>	<b>\$82,222.00</b>
<b>Total - 8300 - Other State Revenues</b>	<b>\$317,581.73</b>
<b>8600 - Other Local Revenue</b>	
<b>8631 - Sales</b>	
8634 - Food Service Sales	\$61,107.19
8636 - Uniforms	\$412.00
<b>Total - 8631 - Sales</b>	<b>\$61,519.19</b>
8660 - Interest	\$26.20
<b>8670 - Fees and Contracts</b>	
8676 - After School Program Revenue	\$323,710.62
<b>Total - 8670 - Fees and Contracts</b>	<b>\$323,710.62</b>
<b>8690 - Other Local Revenue</b>	
8693 - Field Trips	\$12,631.50
8699 - All Other Local Revenue	\$1,793.74
<b>Total - 8690 - Other Local Revenue</b>	<b>\$14,425.24</b>
<b>Total - 8600 - Other Local Revenue</b>	<b>\$399,681.25</b>
<b>8800 - Donations/Fundraising</b>	
8801 - Donations - Parents	\$61,464.30
8802 - Donations - Private	\$23,339.28
8803 - Fundraising	\$203,421.07
<b>Total - 8800 - Donations/Fundraising</b>	<b>\$288,224.65</b>
<b>Total - 8000 - Revenue</b>	<b>\$2,261,117.03</b>
<b>Total - Income</b>	<b>\$2,261,117.03</b>

Financial Row	Amount
<b>Gross Profit</b>	<b>\$2,261,117.03</b>
<b>Expense</b>	
<b>1000 - Certificated Salaries</b>	
1100 - Teachers Salaries	\$543,615.15
<b>1900 - Certificated Other Salaries</b>	
1930 - Other Cert - Counselor	\$23,819.24
<b>Total - 1900 - Certificated Other Salaries</b>	<b>\$23,819.24</b>
<b>Total - 1000 - Certificated Salaries</b>	<b>\$567,434.39</b>
<b>2000 - Classified Salaries</b>	
2100 - Classified Instructional Aide Salaries	\$80,576.32
2300 - Classified Supervisor & Administrator Salaries	\$177,258.05
<b>2900 - Classified Other Salaries</b>	
2905 - Other Classified - After School	\$21,907.40
2930 - Other Classified - Maintenance/grounds	\$21,075.57
<b>Total - 2900 - Classified Other Salaries</b>	<b>\$42,982.97</b>
<b>Total - 2000 - Classified Salaries</b>	<b>\$300,817.34</b>
<b>3000 - Employee Benefits</b>	
<b>3100 - STRS</b>	
3100 - STRS	\$153.30
3101 - State Teachers Retirement System, certificated positions	\$46,718.99
<b>Total - 3100 - STRS</b>	<b>\$46,872.29</b>
<b>3300 - OASDI-Medicare-Alternative</b>	
3303 - Medicare, certificated positions	\$20,212.73
3304 - Medicare, classified positions	\$11,136.59
<b>Total - 3300 - OASDI-Medicare-Alternative</b>	<b>\$31,349.32</b>
<b>3400 - Health &amp; Welfare Benefits</b>	
3401 - Health & Welfare Benefits - Certificated Positions	\$73,789.16
<b>Total - 3400 - Health &amp; Welfare Benefits</b>	<b>\$73,789.16</b>
<b>3500 - Unemployment Insurance</b>	
3501 - State Unemploy. Insurance - Certificated Positions	\$6,569.28
3502 - State Unemploy. Insurance - Classified Positions	\$3,372.07
<b>Total - 3500 - Unemployment Insurance</b>	<b>\$9,941.35</b>
<b>3600 - Workers Comp Insurance</b>	
3601 - Worker's Comp Insurance - Certificated Positions	\$21,447.73
<b>Total - 3600 - Workers Comp Insurance</b>	<b>\$21,447.73</b>
<b>3900 - Other Employee Benefits</b>	
3915 - Misc. Benefit Fees	\$1,416.00
<b>Total - 3900 - Other Employee Benefits</b>	<b>\$1,416.00</b>
<b>Total - 3000 - Employee Benefits</b>	<b>\$184,815.85</b>
<b>4000 - Books &amp; Supplies</b>	
4100 - Approved Textbooks & Core Curricula Materials	\$40,157.14
4200 - Books & Other Reference Materials	\$3,063.84
<b>4300 - Materials &amp; Supplies</b>	
4300 - Materials & Supplies	\$1,414.97
4315 - Custodial Supplies	\$2,361.62
4320 - Educational Software	\$2,425.00
4325 - Instructional Materials & Supplies	\$12,260.89
4326 - Art & Music Supplies	\$28.31
4330 - Office Supplies	\$2,135.20
4335 - PE Supplies	\$1,151.11
4345 - Non Instructional Student Materials & Supplies	\$1,369.56
4346 - Teacher Supplies	\$4,264.53
4350 - Uniforms	\$487.13
<b>Total - 4300 - Materials &amp; Supplies</b>	<b>\$27,898.32</b>
<b>4400 - Noncapitalized Equipment</b>	
4410 - Classroom Furniture, Equipment & Supplies	\$2,524.80
4420 - Computers (individual items less than \$5k)	\$19,402.87
4435 - Non Classroom Noncapitalized items 2	\$1,166.50
<b>Total - 4400 - Noncapitalized Equipment</b>	<b>\$23,094.17</b>
<b>4700 - Food</b>	
4710 - Student Food Services	\$62,011.54
4720 - Other Food	\$1,771.93
<b>Total - 4700 - Food</b>	<b>\$63,783.47</b>

Financial Row	Amount
<b>Total - 4000 - Books &amp; Supplies</b>	<b>\$157,996.94</b>
<b>5000 - Services &amp; Other Operating Expenses</b>	
<b>5200 - Travel &amp; Conferences</b>	
5210 - Conference Fees	\$855.00
5220 - Travel and Lodging	\$1,730.83
<b>Total - 5200 - Travel &amp; Conferences</b>	<b>\$2,585.83</b>
<b>5300 - Dues &amp; Memberships</b>	
5305 - Dues & Membership - Professional	\$1,105.00
<b>Total - 5300 - Dues &amp; Memberships</b>	<b>\$1,105.00</b>
<b>5400 - Insurance</b>	
5450 - Insurance - Other	\$16,953.44
<b>Total - 5400 - Insurance</b>	<b>\$16,953.44</b>
<b>5500 - Operations &amp; Housekeeping</b>	
5510 - Utilities - Gas and Electric	\$8,029.31
5515 - Janitorial, Gardening Services & Supplies	\$3,591.95
5520 - Security	\$4,959.03
5525 - Utilities - Waste	\$4,933.36
5530 - Utilities - Water	\$4,129.73
<b>Total - 5500 - Operations &amp; Housekeeping</b>	<b>\$25,643.38</b>
<b>5600 - Rentals, Leases, &amp; Repairs</b>	
5605 - Equipment Leases	\$6,305.80
5610 - Rent	\$121,800.00
5615 - Repairs and Maintenance - Building	\$8,543.37
<b>Total - 5600 - Rentals, Leases, &amp; Repairs</b>	<b>\$136,649.17</b>
<b>5800 - Other Services &amp; Operating Expenses</b>	
5803 - Accounting Fees	\$35.00
5809 - Banking Fees	\$302.25
5812 - Business Services	\$78,000.05
5819 - Service 8	\$6,950.00
5824 - District Oversight Fees	\$37,085.95
5830 - Field Trips Expenses	\$14,983.24
5834 - Service 11	\$7,188.05
5836 - Fingerprinting	\$509.98
5839 - Fundraising Expenses	\$2,627.38
5843 - Interest - Loans Less than 1 Year	\$601.00
5845 - Legal Fees	\$28,571.14
5851 - Marketing and Student Recruiting	\$1,472.60
5854 - Consultants - Other 1	\$57,827.12
5855 - Consultants - Other 2	\$90,099.61
5857 - Payroll Fees	\$2,146.00
5860 - Printing and Reproduction	\$13,796.34
5863 - Professional Development	\$38,761.61
5872 - Special Education Encroachment	\$104,639.05
5875 - Staff Recruiting	\$5,542.00
5878 - Student Assessment	\$7,179.34
5881 - Student Information System	\$345.00
5884 - Substitutes	\$9,284.88
5899 - Miscellaneous Operating Expenses	\$2,790.72
<b>Total - 5800 - Other Services &amp; Operating Expenses</b>	<b>\$510,738.31</b>
<b>5900 - Communications</b>	
5910 - Communications - Internet / Website Fees	\$3,410.59
5915 - Postage and Delivery	\$339.07
5920 - Communications - Telephone & Fax	\$3,850.57
<b>Total - 5900 - Communications</b>	<b>\$7,600.23</b>
<b>Total - 5000 - Services &amp; Other Operating Expenses</b>	<b>\$701,275.36</b>
<b>Total - Expense</b>	<b>\$1,912,339.88</b>
<b>Net Ordinary Income</b>	<b>\$348,777.15</b>
<b>Net Income</b>	<b>\$348,777.15</b>

**ESP-CA**  
**EdTec Network : Yu Ming Charter School (YMCS)**  
**Balance Sheet**  
**As of June 30, 2014**

Financial Row	Amount
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Bank</b>	
<b>9120-YMCS - Cash in Bank - YMCS</b>	
9121-4009 - Cash in Bank - YMCS: First Republic (Main)	\$463,647.56
9130-YMCS - Cash On Hand - YMCS: No Bank Acct	\$94.08
<b>Total - 9120-YMCS - Cash in Bank - YMCS</b>	<b>\$463,741.64</b>
<b>Total Bank</b>	<b>\$463,741.64</b>
<b>Accounts Receivable</b>	
<b>9200 - Accounts Receivable</b>	
9219 - AR - Special Ed (Fed)	\$19,431.00
9230 - AR - State Aid	\$189,698.00
9232 - AR - Property Taxes	\$4,714.00
9233 - AR - Lottery	\$18,800.88
9239 - AR - Special Education	\$26,994.00
9247 - AR - School Facilities Apportionment	\$97,994.96
9249 - AR - Other State Grants	\$77,260.00
9251 - AR - Gen Purpose prior yr adjustment (Due from District)	\$2,591.00
9252 - AR - Gen Purpose/Categ/SHI PY Adj (Due from Co)	\$1,013.00
<b>Total - 9200 - Accounts Receivable</b>	<b>\$438,496.84</b>
<b>Total Accounts Receivable</b>	<b>\$438,496.84</b>
<b>Other Current Asset</b>	
9330 - Prepaid Expenditures (Expenses)	\$7,487.09
<b>Total Other Current Asset</b>	<b>\$7,487.09</b>
<b>Total Current Assets</b>	<b>\$909,725.57</b>
<b>Other Assets</b>	
9360 - Other Asset - Deposits	\$30,000.00
<b>Total Other Assets</b>	<b>\$30,000.00</b>
<b>Total ASSETS</b>	<b>\$939,725.57</b>
<b>LIABILITIES &amp; EQUITY</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
<b>9500 - Accounts Payable</b>	
9500 - Accounts Payable	\$90,492.22
9516 - AP - Payable to County (prior yr adj)	\$1,759.00
<b>Total - 9500 - Accounts Payable</b>	<b>\$92,251.22</b>
<b>Total Accounts Payable</b>	<b>\$92,251.22</b>
<b>Other Current Liability</b>	
9502 - AP - District Oversight Fee	\$5,058.70
<b>Total Other Current Liability</b>	<b>\$5,058.70</b>
<b>Total Current Liabilities</b>	<b>\$97,309.92</b>
<b>Long Term Liabilities</b>	
<b>9660 - Long Term Liabilities</b>	
9670 - CDE Loan	\$125,000.00
<b>Total - 9660 - Long Term Liabilities</b>	<b>\$125,000.00</b>
<b>Total Long Term Liabilities</b>	<b>\$125,000.00</b>
<b>Equity</b>	
Retained Earnings	\$368,638.50
Net Income	\$348,777.15
<b>Total Equity</b>	<b>\$717,415.65</b>
<b>Total LIABILITIES &amp; EQUITY</b>	<b>\$939,725.57</b>

<b>Yu Ming Charter School</b>		STATE AID	MH LEVEL 1	MH LEVEL 2	MH LEVEL 3	MH FED LEVEL 3	FEDERAL	CHARTER TOTALS	STATE AND LOCAL ONLY:	MOE Met?
<b>2013/14 ACTUALS</b>		RS 6500	RS 6512	RS 6512	RS 6512	RS 3327	RS 3310			met
<b>INCOME:</b>										
	STATE RESERVE (IF APPLICABLE)	-	-	-	-	-	-	-	-	-
	PRIOR YEAR CARRY OVER	-	-	-	-	-	-	-	-	-
	STATE	94,975.00	4,137.00	-	-	-	-	99,112.00	99,112.00	-
	STATE RESERVE USED (IF NEEDED)	-	-	-	-	-	-	-	-	-
	LEGAL RISK POOL	-	-	-	-	-	-	-	-	-
	FEDERAL	-	-	-	-	-	19,431.00	19,431.00	-	-
	ADMIN FEE	4,796.00	-	-	-	-	-	4,796.00	4,796.00	-
	<b>TOTAL AVAILABLE</b>	<b>99,771.00</b>	<b>4,137.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>19,431.00</b>	<b>123,339.00</b>	<b>103,908.00</b>	
<b>Direct Costs</b>										
	Certificated Salaries	23,819.24	-	-	-	-	-	23,819.24	23,819.24	-
	Classified Salaries	-	-	-	-	-	-	-	-	-
	Employee Benefits	5,741.10	-	-	-	-	-	5,741.10	5,741.10	-
	Books and Supplies	-	-	-	-	-	-	-	-	-
	Services and other operating expend	81,065.05	4,143.00	-	-	-	19,431.00	104,639.05	85,208.05	-
	Admin Fee	4,796.00	-	-	-	-	-	4,796.00	4,796.00	-
	Capital Outlay	-	-	-	-	-	-	-	-	-
	<b>Total Direct Costs</b>	<b>115,421.39</b>	<b>4,143.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>19,431.00</b>	<b>138,995.39</b>	<b>119,564.39</b>	
	Direct Support:	-	-	-	-	-	-	-	-	-
	Indirect Cost Rate (13/14 Charter approved rate)	-	0.00%	0.00%	0.00%	0.00%	-	-	-	-
	Indirect Costs (calculated)	-	-	-	-	-	-	-	-	-
	<b>TOTAL COSTS</b>	<b>115,421.39</b>	<b>4,143.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>19,431.00</b>	<b>138,995.39</b>	<b>119,564.39</b>	
	<b>Total Local Contribution</b>	<b>15,650.39</b>	<b>6.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>15,656.39</b>	<b>15,656.39</b>	
	<b>Total Carry over</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	
								15,656.39		

<b>Yu Ming Charter School</b>		STATE AID	MH LEVEL 1	MH LEVEL 2	MH LEVEL 3	MH LEVEL 3	FEDERAL	CHARTER TOTALS	STATE AND LOCAL ONLY:	MOE Met?
<b>2014/15 BUDGET</b>		RS 6500	RS 6512	RS 6512	RS 6512	RS 3327	RS 3310			met
<b>INCOME:</b>										
	PRIOR YEAR CARRY OVER	-	-	-	-	-	-	-	-	-
	STATE	122,608.00	-	-	-	-	-	122,608.00	122,608.00	Pupil Count
	FEDERAL	-	-	-	-	-	24,820.00	24,820.00	24,820.00	9
	ADMIN FEE	6,121.00	-	-	-	-	-	6,121.00	6,121.00	
	<b>TOTAL INCOME</b>	<b>128,729.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>24,820.00</b>	<b>153,549.00</b>	<b>128,729.00</b>	
<b>Direct Costs</b>										
	Certificated Salaries	54,280.00	-	-	-	-	-	54,280.00	54,280.00	-
	Classified Salaries	45,000.00	-	-	-	-	-	45,000.00	45,000.00	-
	Employee Benefits	24,820.00	-	-	-	-	-	24,820.00	24,820.00	-
	Books and Supplies	-	-	-	-	-	-	-	-	-
	Services and other operating expend	75,404.00	-	-	-	-	24,820.00	100,224.00	75,404.00	-
	Admin Fee	6,121.00	-	-	-	-	-	6,121.00	6,121.00	-
	Capital Outlay	-	-	-	-	-	-	-	-	-
	<b>Total Direct Costs</b>	<b>205,625.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>24,820.00</b>	<b>230,445.00</b>	<b>205,625.00</b>	
	Direct Support:	-	-	-	-	-	-	-	-	-
	Indirect Cost Rate (13/14 Charter approved rate)	-	-	-	-	-	-	-	-	-
	Indirect Costs (calculated)	-	-	-	-	-	-	-	-	-
	<b>TOTAL COSTS</b>	<b>205,625.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>24,820.00</b>	<b>230,445.00</b>	<b>205,625.00</b>	
	<b>Total Local Contribution</b>	<b>76,896.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>76,896.00</b>	<b>76,896.00</b>	
	<b>Total Carry over</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	
								76,896.00		



**Board of Directors**  
**Thursday, September 18<sup>th</sup>, 2014**  
**AGENDA ITEM INFORMATION**

<b>Agenda Item</b>	School Goals
<b>Time Allotted</b>	60 minutes
<b>Summary</b>	Discuss proposed goals for 2014-15 School Year, in anticipation of October approval
<b>Type</b>	Discussion
<b>Background</b>	At the August Board retreat, we drafted potential goals for the 2014-2015 school year. We informed families about the goal setting process in weekly e-newsletters, will be discussing goals at the September PAG meeting, and will invite parent questions and comments via a google doc. We are aiming to adopt the goals at the Oct Board meeting and will communicate the final version with families, again through various channels. (Ideally in the future we will complete the goal-setting by the beginning of the school year.)
<b>Key Questions</b>	<ul style="list-style-type: none"> <li>• What other information do we need to finalize goals for this year?</li> </ul>
<b>Attachments</b>	<ul style="list-style-type: none"> <li>• 2013-2014 Outcomes and 2014-15 Goals (DRAFT)</li> </ul>

	<u>Metric</u>	<u>2012-2013 Baseline</u>	<u>2013-14 Target</u> <i>Set as of 10/24/13</i>	<u>2013-2014 Actual</u> <i>as of 9/15/14</i>	<u>2014-2015 Proposed Target</u>	<u>Notes</u>
Student Outcomes	Mandarin Proficiency: ELLOPA & SOPA	K OF/G/V/L = 96/98/94/100 G1 OF/G/V/L = 77/75/71/98 G2 OF/G/V/L = 96/94/94/94	K = 96/96/96/100% G1 = 95/95/95/100% G2 = 85/85/85/100% G3 = 96/96/96/100%	TBD. Staff is getting advanced training and will re-score ELLOPA and SOPA tests given in Spring 2013.	Pending 2013-2014 results K = 96/96/96/100% G1 = 96/96/96/100% G2 = 96/96/96/100% G3 = 90/90/90/100% G4 = 96/96/96/100%	Early Language Learning Oral Performance Assessment (ELLOPA) for K-2 evaluates four areas: Oral Fluency, Grammar, Vocabulary & Listening. The Student Oral Proficient Assessment (SOPA) is similar, for grades 3-8. Goals for each grade level are based on the goal of reaching American Council on the Teaching of Foreign Languages (ACTFL) Proficiency Guidelines “Advanced Low and Medium” by G8. (Note: Most schools’ target is Intermediate.)
	Math: NA	100% proficient or advanced	NA	MAP % average or above = 78% (highavg+high=59%)	80% proficient + adv on SBAC	In 2013, CA’s State Testing and Reporting (STAR) program tested the new Common Core aligned Smarter Balanced Assessment Consortium (SBAC) test. Individual student and school scores were not given. We administered the NWEA MAP (Northwest Education Association Measure of Academic Progress) assessment in February as an alternative CCSS-aligned measure. Note: in other states that have transitioned to new CCSS tests, it is not uncommon to have proficiency rates drop by 25 percentage points.
	English: NA	78% proficient or advanced	NA	MAP % average or above = 62% (highavg+high=41%)	65% proficient + adv on SBAC	CA’s Academic Performance Index formula has not yet been updated to accommodate the new SBAC test. Our 2012-2013 API score will be used until then. (API scale = 200 to 1000.)
	Overall: API	2012-13: 944	NA	NA	NA	CA’s Academic Performance Index formula has not yet been updated to accommodate the new SBAC test. Our 2012-2013 API score will be used until then. (API scale = 200 to 1000.)
	Writing Assignments (MLA & ELA)	None – new in 2013-2014	MLA/ELA % Proficient K =80/50 G1=85/55 G2=90/60 GR3=95/70	MLA/ELA % Proficient K = G1= G2= GR3=		Yu Ming has created end-of-trimester writing assignments (with science and social studies content). Both Mandarin and English assignments will be scored by teachers based on similar rubrics, aligned to the Common Core State Standards for English and Yu Ming’s adapted Mandarin Standards. Target is for end-of-year assignments.
	Mandarin Reading	None	NA	NA	TBD	In 2013-2014, we had not identified a reliable system for testing student Mandarin reading proficiency.
	Character, Values & Global Citizenship	None	NA	NA	TBD	In 2013-2014, we had not identified an approach of measuring students’ life skills as described in our mission: <ul style="list-style-type: none"> <li>To nurture curiosity, international perspective and diligence in attaining personal goals</li> <li>To develop compassionate individuals with sound moral character and respect for community/environment</li> </ul>
School Climate and Culture	Student Perception	None	95% agree/strongly agree	NA	TBD	The student survey this year was used for feedback to teachers and did not include an overall evaluative measure.
	Staff Satisfaction:	None	NPS = 30	NA	TBD	Too few staff members completed the survey in Spring 2014.
	Parent Satisfaction: NPS	NPS = 34	NPS = 45	NPS = 36	NPS = 45	Net Promoter Score (NPS) is a widely used consumer satisfaction research question although its use has not been tested in schools and the current wording may be limiting.
	Parent involvement	85% (self-report)	100% Yes	87%	100% Yes	Based on a question on the anonymous end-of-year parent survey: “Have you met the 30-hour volunteer requirement for families at Yu Ming?” (Not based on actual volunteer hours reported to volunteer coordinator.)
	Target area: valuing diversity	59% scoring 7+	70% scoring 7+	65% scoring 7+	75% scoring 7+	Based on the end-of-year parent survey: “Please indicate the degree to which you agree that: Yu Ming values diversity of backgrounds.” Scale of 0-10; 10 is strongly agree. Long Term goal: 100%
	Target area: confidence in Leadership	45% scoring 7+	70% scoring 7+	45% scoring 7+	70% scoring 7+	Based on the end-of-year parent survey: “Please indicate the degree to which you agree that Yu Ming’s Board makes sound decisions about the direction of the school.” Scale of 1-10; 10 is strongly agree.



**School Goals**
**DRAFT** updated 9/16/14

<b>School Growth and Stability</b>	Enrollment	100%	100%	100%	100%	In the future, we may consider adding Wait List as a measure of longer term enrollment stability.
	Student body diversity	NA	NA	NA	TBD	In our charter, we aspire to have a student body that is as diverse as Alameda County, and we are undertaking additional effort this year in our enrollment outreach.
	Attendance	97%	97%	98%	97%	Based on calculated Average Daily Attendance (ADA), on which state and federal per pupil funding is based
	Cash reserve	6/30/13 balance: 25%	6/30/14 balance: 10%	6/30/14 balance: 37%	6/30/15 balance: 10%	Our fund balance includes one-time start-up grant funds received in 2011 and 2012, which are being spent to cover the costs of adding a grade level each year.
	Adequate facilities	Yes	On track to secure next facility for 2015	Yes, secured Herzog	On track to secure next facility for Fall 2016	Based on current enrollment plans, we will outgrow our current Alcatraz + Herzog space after the 2015-16 school year.
	Staff Retention	75%	90%	84%	90%	Based on principal evaluation; applies to high-performing staff only. Includes all staff, both teaching and non-teaching.
	Community relations	TBD	TBD	NA	TBD	In 2013-2014, we had not identified an approach to measuring our community engagement.



# USER GUIDE

# PANORAMA STUDENT SURVEY

PANORAMA EDUCATION

DR. HUNTER GEHLBACH

HARVARD GRADUATE SCHOOL OF EDUCATION

This work was adapted from work developed at Harvard University by Dr. Hunter Gehlbach and his research team at the Harvard Graduate School of Education

# INTRODUCING THE PANORAMA STUDENT SURVEY



Dear colleagues,

Last year, researchers at the Harvard Graduate School of Education and Panorama Education launched a first-of-its-kind collaboration to develop a valid and reliable survey tool to measure student perceptions of teaching and learning.

Our goal was to develop a survey instrument that would be grounded in the most advanced survey methodology and practice. From the outset, we committed to making all of our work available as a free and open source resource for educators across the world.

We are proud to share with you the product of our collaboration: the Panorama Student Survey, version 1.0. This feedback instrument provides teachers and principals with valuable and actionable data about how students see their classes.

We have designed the survey as a series of scales, or questions related to a single construct, so that educators may customize the survey by selecting the constructs they value most, without compromising the integrity of the survey. As described on the following pages, we have rigorously developed and validated this survey, and our teams are committed to continuing to refine the survey for years to come.

We hope you find this tool valuable for your classroom, your school, your district, or your state. If you have any questions or suggestions, please don't hesitate to contact us at [survey\\_team@panoramaed.com](mailto:survey_team@panoramaed.com). We welcome your feedback.

Sincerely,

A handwritten signature in black ink that reads "Hunter Gehlbach".

Dr. Hunter Gehlbach  
Associate Professor  
Harvard Graduate School of Education  
[hunter\\_gehlbach@gse.harvard.edu](mailto:hunter_gehlbach@gse.harvard.edu)

A handwritten signature in black ink that reads "Aaron Feuer".

Aaron Feuer  
CEO  
Panorama Education  
[afeuer@panoramaed.com](mailto:afeuer@panoramaed.com)

The Panorama Student Survey gathers feedback from students about their experience in the classroom. Developed by researchers at the Harvard Graduate School of Education and Panorama Education, this survey was created as a formative tool for educators. School systems may also choose to incorporate the survey into educator evaluation systems.

### Here's what you need to know:

1) The instrument was developed and validated in line with modern survey design best practices.

The survey was developed under the leadership of Dr. Hunter Gehlbach, Associate Professor at the Harvard Graduate School of Education, a leading survey methodologist and education researcher, and a former high school social studies teacher. Dr. Gehlbach and his team followed a rigorous survey development process that involved literature reviews, feedback from experts around the country, cognitive interviews with students, and multiple rounds of piloting and refinement -- for more information, please find a full description of the development and validation process on the following pages.

The Panorama Student Survey looks slightly different than many school surveys that are administered today. That's because Dr. Gehlbach and his team developed the instrument in line with today's best practices for survey design. For example, unlike many education surveys, each item on the Panorama Student Survey is worded as a question, rather than a statement, in line with overwhelming research showing that students' feedback is more valid when items are worded as questions rather than statements. For an explanation of some of the survey design best practices that went into the making of the Panorama Student Survey, please visit [www.panoramaed.com/checklist](http://www.panoramaed.com/checklist).

2) The survey is customizable.

Education is not "one size fits all", and long surveys don't collect valid data. We designed this survey as a library of scales, or groups of questions that come together to measure a single construct. We encourage educators to customize the survey by picking and choosing the constructs that they feel matter most in their context.

### 3) The survey is completely free and open source

We believe that all educators deserve the best tools available. We've committed to making the Panorama Student Survey free and open source. What does that mean?

The survey is “free” in that we invite educators everywhere to use the survey at no cost. We only ask that you identify the survey as the “Panorama Student Survey”, so that others may find it as well.

By making the survey “open source”, we're encouraging everyone to customize the survey and help make it better. This is a collaborative endeavor. Our only request is that you share your improvements back with our research team so we can consider incorporating them into future versions of the survey. (Contact us via [survey\\_team@panoramaed.com](mailto:survey_team@panoramaed.com)).

### 4) The survey can be administered at the classroom level or the school level

We believe the Panorama Student Survey can be a powerful tool for teachers to collect feedback from their students. However, school systems may also choose to administer the survey at the school level.

## ABOUT PANORAMA EDUCATION

**Panorama Education** partners with school districts and state departments of education to design and implement survey programs for students, parents, and teachers. Panorama offers a technology platform to support survey administration and create reports that are clear, actionable, and, most importantly, help teachers and administrators improve their schools. Panorama's client services team helps districts and states implement survey programs in line with best practices. Panorama currently runs survey programs online and on paper in over 5,000 schools across 31 states, with clients including the Los Angeles Unified School District, the Connecticut State Department of Education, Achievement First, and Teach for America.



The Panorama Student Survey consists of a library of scales, or groups of questions that measure a single construct. Educators may customize the survey by selecting the combination of scales that they believe are most important in a particular context.

## Classroom-level Scales

The following scales measure student perceptions of teaching and learning in a particular class. (Surveys containing these scales may also be administered at the school level for an overall view of teaching and learning.)

### Pedagogical Effectiveness

This scale measures students' perceptions of a teacher's instructional methods and delivery of content.

*Example Question: How clearly does this teacher present the information that you need to learn?*

### Classroom Environment

This scale measures students' perceptions of the overall classroom climate including the classroom's physical, social and psychological environment.

*Example Question: How often do students behave well in this class?*

### Expectations and Rigor

This scale measures students' perceptions of the extent to which their teacher holds them to high expectations around their effort, understanding, persistence, and performance in their class.

*Example Question: How much does this teacher encourage you to do your best?*

### Student Engagement

This scale measures students' perceptions of their attention to and investment in what goes on in the classroom.

*Example Question: In this class, how much do you participate?*

### Supportive Relationships

This scale measures students' perceptions of a teacher's care and support for their personal development and well-being beyond the classroom.

*Example Question: How interested is this teacher in what you do outside of class?*

### Supplemental Scales

In the process of developing the Panorama Student Survey, we heard feedback from educators requesting additional scales that would provide school-level and student-level context to survey data about teaching and learning. In particular, educators expressed interest in feedback around students' sense of belonging at school, student interest in the subject matter, social emotional skills / soft skills such as grit, and student's abilities to use learning strategies in the classroom.

We encourage educators to consider including the following four scales in their survey programs:

#### Sense of Belonging

This scale measures the extent to which students feel that they are valued members of their school's community.

*Example Question: How connected do you feel to the adults at your school?*

#### Interest in Subject

This scale measures how interesting, important, and useful a student considers a specific subject.

*Example Question: How often do you use ideas from [SUBJECT] class in your daily life?*

#### Grit

This scale measures a student's ability to persevere through setbacks to achieve important long-term goals.

*Example Question: If you fail to reach an important goal, how likely are you to try again?*

#### Learning Strategies

This scale measures the extent to which students deliberately use strategies to actively manage their own learning process.

*Example Question: Before you start working on your schoolwork, how often do you think about the best way to approach the work?*

Educators using the Panorama Student Survey can be particularly confident that the set of measures in the Panorama Student Survey will yield high quality data because of the rigorous design process that was used to develop them.

In the first phase of the project, the research team led by Professor Gehlbach conducted an extensive literature review and interviewed dozens of students to get both academic and applied perspectives on which aspects of students' experiences were most important to include in the survey. After synthesizing the input from these two perspectives, the research team developed survey questions with strict attention to the scientific best practices in designing survey items. After developing the items, the research team then contacted dozens of academic experts to get their feedback on those items within their area of specialty.

Next, using cognitive interviews (also called "think alouds") with students, the research team ensured that students understood each and every question in the way that was intended. Finally, the research team and Panorama piloted these measures in schools across the country including in a large scale pilot partnership with the North Carolina Department of Public Instruction, adjusting the survey after each administration in response to feedback from participants and data gathered.

For those interested in a more technical discussion of Professor Gehlbach's process, please see his 2011 paper (with Dr. Maureen Brinkworth), [Measure twice, Cut Down Error: A process for enhancing the validity of survey scales](#), for more information on the methodology.

## ABOUT DR. HUNTER GEHLBACH



**Hunter Gehlbach** is Associate Professor of Education at the Harvard Graduate School of Education. He is an educational psychologist with an academic focus in helping social scientists and practitioners design better surveys and questionnaires. He is particularly interested in helping schools think about ways to use surveys to improve teacher and student outcomes and teaches classes in each of these areas at Harvard. After graduating with a B.A. from Swarthmore College in psychology and education, Gehlbach taught high school social studies before returning to school for a M.Ed. in school counseling from the University of Massachusetts-Amherst and a Ph.D. in educational psychology from Stanford.



# COMPLETE LIST OF SCALES & SURVEY ITEMS

## PEDAGOGICAL EFFECTIVENESS - Classroom-level Scale

This scale measures students' perceptions of a teacher's instructional methods and delivery of content.

Grades 6-12

Item	Response Anchors				
Overall, how much have you learned from this teacher about <SUBJECT>?	Almost nothing	A little bit	Some	Quite a bit	A tremendous amount
During class, how motivating are the activities that this teacher has you do?	Not at all motivating	Slightly motivating	Somewhat motivating	Quite motivating	Extremely motivating
For this class, how clearly does this teacher present the information that you need to learn?	Not at all clearly	Slightly clearly	Somewhat clearly	Quite clearly	Extremely clearly
How interesting does this teacher make what you are learning in class?	Not at all interesting	Slightly interesting	Somewhat interesting	Quite interesting	Extremely interesting
How often does this teacher give you feedback that helps you learn?	Almost never	Once in a while	Sometimes	Often	All the time
When you need extra help, how good is this teacher at giving you that help?	Not at all good	Slightly good	Somewhat good	Quite good	Extremely good
How comfortable are you asking this teacher questions about what you are learning in his or her class?	Not at all comfortable	Slightly comfortable	Somewhat comfortable	Quite comfortable	Extremely comfortable
How often has this teacher taught you things that you didn't know before taking this class?	Almost never	Once in a while	Sometimes	Often	All the time

Grades 3-5

Item	Response Anchors				
How much have you learned from this teacher?	Almost nothing	A little bit	Some	Quite a bit	A tremendous amount
When you need extra help, how good is this teacher at giving you that help?	Not at all good	Slightly good	Somewhat good	Quite good	Extremely good
How good is this teacher at teaching in the way that you learn best?	Not good at all	A little bit good	Somewhat good	Quite good	Extremely good
How clearly does this teacher present the information that you need to learn?	Not at all clearly	Slightly clearly	Somewhat clearly	Quite clearly	Extremely clearly
How interesting does this teacher make what you are learning in class?	Not at all interesting	Slightly interesting	Somewhat interesting	Quite interesting	Extremely interesting
How good is this teacher at helping you learn?	Not good at all	A little bit good	Somewhat good	Quite good	Extremely good
How much did you learn from this teacher that you didn't know before taking his or her class?	Almost nothing	A little bit	Some	Quite a bit	A tremendous amount

# COMPLETE LIST OF SCALES & SURVEY ITEMS

## CLASSROOM ENVIRONMENT - Classroom-level Scale

This scale measures students' perceptions of the overall classroom climate including the classroom's physical, social and psychological environment.

Grades 6-12

Item	Response Anchors						
On most days, how pleasant or unpleasant is the physical space in this classroom?	Very unpleasant	Somewhat unpleasant	Slightly unpleasant	Neither pleasant nor unpleasant	Slightly pleasant	Somewhat pleasant	Very pleasant
How fair or unfair are the rules for the students in this class?	Very unfair	Somewhat unfair	Slightly unfair	Neither unfair nor fair	Slightly fair	Somewhat fair	Very fair
On most days, how pleasant or unpleasant is your teacher's mood?	Very unpleasant	Somewhat unpleasant	Slightly unpleasant	Neither pleasant nor unpleasant	Slightly pleasant	Somewhat pleasant	Very pleasant
How often do students behave well in this class?	Almost never	Once in a while	Sometimes	Often	Almost always		

Grades 3-5

Item	Response Anchors						
On most days, how pleasant is your teacher's mood?	Very unpleasant	Somewhat unpleasant	Slightly unpleasant	Neither pleasant nor unpleasant	Slightly pleasant	Somewhat pleasant	Very pleasant
How fair or unfair are the rules in this class?	Very unfair	Somewhat unfair	Slightly unfair	Neither unfair nor fair	Slightly fair	Somewhat fair	Very fair
How often do students behave well in this class?	Almost never	Once in a while	Sometimes	Often	Almost always		

## EXPECTATIONS AND RIGOR - Classroom-level Scale

This scale measures students' perceptions of the extent to which their teacher holds them to high expectations around their effort, understanding, persistence, and performance in their class.

Grades 6-12

Item	Response Anchors				
How much does this teacher encourage you to do your best?	Does not encourage me at all	Encourages me a little	Encourages me some	Encourages me quite a bit	Encourages me a tremendous amount
When you feel like giving up on a difficult task, how likely is it that this teacher will make you keep trying?	Not at all likely	Slightly likely	Somewhat likely	Quite likely	Extremely likely
Overall, how high are this teacher's expectations of you?	Not high at all	Slightly high	Somewhat high	Quite high	Extremely high
How often does this teacher make you explain your answers?	Almost never	Once in a while	Sometimes	Often	Almost always
How often does this teacher take time to make sure you understand the material?	Almost never	Once in a while	Sometimes	Often	Almost always

Grades 3-5

Item	Response Anchors				
How much does this teacher encourage you to do your best?	Does not encourage me at all	Encourages me a little	Encourages me some	Encourages me quite a bit	Encourages me a tremendous amount
When you feel like giving up, how likely is it that this teacher will make you keep trying?	Not at all likely	Slightly likely	Somewhat likely	Quite likely	Extremely likely
Overall, how high are this teacher's expectations of you?	Not high at all	Slightly high	Somewhat high	Quite high	Extremely high
How often does this teacher make you explain your answers?	Almost never	Once in a while	Sometimes	Often	Almost always
How often does this teacher take time to make sure you understand the material?	Almost never	Once in a while	Sometimes	Often	Almost always

# COMPLETE LIST OF SCALES & SURVEY ITEMS

## STUDENT ENGAGEMENT - Classroom-level Scale

This scale measures students' perceptions of their attention to and investment in what goes on in the classroom.

Grades 6-12

Item	Response Anchors				
In this class, how much do you participate?	Not at all	A little bit	Some	Quite a bit	A tremendous amount
When you are not in class, how often do you talk about ideas from class?	Almost never	Once in a while	Sometimes	Often	Almost always
How often do you get so focused on class activities that you lose track of time?	Almost never	Once in a while	Sometimes	Often	Almost always
How excited are you about going to this class?	Not at all excited	A little bit excited	Somewhat excited	Quite excited	Extremely excited
Overall, how interested are you in this class?	Not at all interested	A little bit interested	Somewhat interested	Quite interested	Extremely interested

Grades 3-5

Item	Response Anchors				
How much do you participate in class?	Not at all	A little bit	Some	Quite a bit	A tremendous amount
How focused are you on the activities in class?	Not at all focused	A little bit focused	Somewhat focused	Quite focused	Extremely focused
How excited are you about going to this class?	Not at all excited	A little bit excited	Somewhat excited	Quite excited	Extremely excited
How interested are you in this class?	Not at all interested	A little bit interested	Somewhat interested	Quite interested	Extremely interested

## SUPPORTIVE RELATIONSHIPS - Classroom-level Scale

This scale measures students' perceptions of a teacher's care and support for their personal development and well-being beyond the classroom.

Grades 6-12

Item	Response Anchors				
When your teacher asks how you are doing, how often do you feel that your teacher is really interested in your answer?	Almost never	Once in a while	Sometimes	Often	Almost always
How interested is this teacher in what you do outside of class?	Not at all interested	A little bit interested	Somewhat interested	Quite interested	Extremely interested
How interested is this teacher in your career after you finish school?	Not at all interested	A little bit interested	Somewhat interested	Quite interested	Extremely interested
If you walked into class upset, how concerned would your teacher be?	Not at all concerned	Slightly concerned	Somewhat concerned	Quite concerned	Extremely concerned
If you came back to visit class three years from now, how excited would this teacher be to see you?	Not at all excited	A little bit excited	Somewhat excited	Quite excited	Extremely excited
If you had something on your mind, how carefully would this teacher listen to you?	Not at all carefully	A little bit carefully	Somewhat carefully	Quite a bit carefully	Extremely carefully

Grades 3-5

Item	Response Anchors				
When your teacher asks, "how are you?", how often do you feel that your teacher really wants to know your answer?	Almost never	Once in a while	Sometimes	Often	Almost always
How much does this teacher want to learn about what you do when you are not in school?	Not at all	A little bit	Somewhat	Quite	Extremely
How interested is this teacher in what you want to be when you grow up?	Not at all interested	A little bit interested	Somewhat interested	Quite interested	Extremely interested
If you had something on your mind, how carefully would this teacher listen to you?	Not at all carefully	A little bit carefully	Somewhat carefully	Quite a bit carefully	Extremely carefully

## SENSE OF BELONGING - Supplemental Scale

This scale measures the extent to which students feel that they are valued members of their school's community.

Grades 6-12

Item	Response Anchors				
Overall, how much do you feel like you belong at your school?	Do not belong	Belong a little bit	Belong somewhat	Belong quite a bit	Completely belong
At your school, how accepted do you feel by the other students?	Not accepted	A little accepted	Somewhat accepted	Quite accepted	Extremely accepted
How well do people at your school understand you?	Don't understand at all	Understand a little	Understand somewhat	Understand quite a bit	Completely understand
How much respect do students in your school show you?	No respect at all	A little bit of respect	Some respect	Quite a bit of respect	A great deal of respect
How connected do you feel to the adults at your school?	Not at all connected	Slightly connected	Somewhat connected	Quite connected	Extremely connected

Grades 3-5

Item	Response Anchors				
Overall, how much do you feel like you belong at your school?	Do not belong	Belong a little bit	Belong somewhat	Belong quite a bit	Completely belong
How accepted do you feel by other people?	Not at all accepted	A little bit accepted	Somewhat accepted	Quite accepted	Completely accepted
How well do people at your school understand you as a person?	Don't understand at all	Understand a little	Understand somewhat	Understand quite a bit	Completely understand
How much support do the adults at your school give you?	No support at all	A little bit of support	Some support	Quite a bit of support	A great deal of support
How much respect do students at your school show you?	No respect at all	A little bit of respect	Some respect	Quite a bit of respect	A great deal of respect

# COMPLETE LIST OF SCALES & SURVEY ITEMS

## INTEREST IN SUBJECT - Supplemental Scale

This scale measures how interesting, important, and useful a student considers a specific subject.

Grades 6-12

Item	Response Anchors				
How often do you use ideas from [SUBJECT] class in your daily life?	Almost never	Once in a while	Sometimes	Often	Almost always
How useful do you think [SUBJECT] class will be to you in the future?	Not at all useful	A little bit useful	Somewhat useful	Quite useful	Extremely useful
How important is it to you to do well in [SUBJECT] class?	Not at all important	Slightly important	Somewhat important	Quite important	Extremely important
How interesting do you find the things you learn in [SUBJECT] class?	Not at all interesting	Slightly interesting	Somewhat interesting	Quite interesting	Extremely interesting
How much do you see yourself as a/an [SUBJECT] person?	Not at all	A little bit	Somewhat	Quite a bit	A tremendous amount

Grades 3-5

Item	Response Anchors				
How often do you use ideas that you learn in school in your daily life?	Almost never	Once in a while	Sometimes	Often	Almost always
How useful do you think what you learn in school will be to you in the future?	Not at all useful	A little bit useful	Somewhat useful	Quite useful	Extremely useful
How important is it to you to do well in school?	Not at all important	Slightly important	Somewhat important	Quite important	Extremely important
How interesting do you find the things you learn in school?	Not at all interesting	Slightly interesting	Somewhat interesting	Quite interesting	Extremely interesting

# COMPLETE LIST OF SCALES & SURVEY ITEMS

## GRIT - Supplemental Scale

This scale measures a student's ability to persevere through setbacks to achieve important long-term goals.

Grades 6-12

Item	Response Anchors				
If you have a problem while working towards an important goal, how well can you keep working?	Not well at all	Slightly well	Somewhat well	Quite well	Extremely well
How often do you stay focused on the same goal for several months at a time?	Almost never	Once in a while	Sometimes	Frequently	Almost always
When you are working on a project that matters a lot to you, how focused can you stay when there are lots of distractions?	Not at all focused	Slightly focused	Somewhat focused	Quite focused	Extremely focused
If you fail to reach an important goal, how likely are you to try again?	Not at all likely	Slightly likely	Somewhat likely	Quite likely	Extremely likely
How likely is it that you can motivate yourself to do unpleasant tasks if they will help you accomplish your goals?	Not at all likely	Slightly likely	Somewhat likely	Quite likely	Extremely likely
If you have a problem while working towards an important goal, how well can you keep working?	Not well at all	Slightly well	Somewhat well	Quite well	Extremely well

Grades 3-5

Item	Response Anchors				
If you have a problem while working towards an important goal, how well can you keep working?	Not well at all	Slightly well	Somewhat well	Quite well	Extremely well
When you are working on a project that matters a lot to you, how focused can you stay when there are lots of distractions?	Not focused at all	Slightly focused	Somewhat focused	Quite focused	Extremely focused
If you fail at an important goal, how likely are you to try again?	Not at all likely	Slightly likely	Somewhat likely	Quite likely	Extremely likely
If you need to do something you don't want, in order to reach an important goal, how likely are you to do it?	Not at all likely	Slightly likely	Somewhat likely	Quite likely	Extremely likely



# COMPLETE LIST OF SCALES & SURVEY ITEMS

## LEARNING STRATEGIES - Supplemental Scale

This scale measures the extent to which students deliberately use strategies to actively manage their own learning process.

Grades 6-12

Item	Response Anchors				
Before you start working on your schoolwork, how often do you think about the best way to approach the work?	Almost never	Once in a while	Sometimes	Frequently	Almost always
How confident are you that you can choose an effective strategy to get your schoolwork done well?	Not at all confident	Slightly confident	Somewhat confident	Quite confident	Extremely confident
How often do you use strategies to learn more effectively?	Almost never	Once in a while	Sometimes	Frequently	Almost always
When you get stuck while learning something new, how likely are you to try a different strategy?	Not at all likely	Slightly likely	Somewhat likely	Quite likely	Extremely likely
How often do you check to make sure you understand the material you are learning in class?	Almost never	Once in a while	Sometimes	Frequently	Almost always
Overall, how well do your learning strategies help you learn more effectively?	Not well at all	Slightly well	Somewhat well	Quite well	Extremely well

Grades 3-5

Item	Response Anchors				
Before you start working on your schoolwork, how often do you think about the best way to do it?	Almost never	Once in a while	Sometimes	Frequently	Almost always
How sure are you that you can figure out a good way to get your schoolwork done well?	Not at all sure	Slightly sure	Somewhat sure	Quite sure	Extremely sure
When you get stuck while learning something new, how likely are you to try to learn it in a different way?	Not at all likely	Slightly likely	Somewhat likely	Quite likely	Extremely likely
How often do you check to make sure you understand what you are learning in class?	Almost never	Once in a while	Sometimes	Frequently	Almost always
Overall, how well can you figure out how to learn things?	Not well at all	Slightly well	Somewhat well	Quite well	Extremely well

# K-12 Parent Survey

In this survey, we are interested in learning more about your thoughts, feelings, and attitudes towards your child's school.

When answering these questions, please consider your child's current experience at school.

This survey is to help us understand different aspects of the parent/school relationship. Your answers will be used in aggregate, and we will not be evaluating individual responses. As such, please be as honest as possible - there are no right or wrong answers.

Because different children often have different experiences in the same school, please complete this survey once per child.

**1. Please write only the FIRST name of your child who is attending your school.**

# K-12 Parent Survey

In this first section, we'd like to learn more about some of your roles, beliefs, and attitudes as well as some of the activities that you do as the parent of a school-aged child.

## 2. How often do you meet in person with teachers at your child's school?

- Almost never
- Once or twice per year
- Every few months
- Monthly
- Weekly or more

## 3. How confident are you that you can help your child develop good friendships?

- Not confident at all
- Slightly confident
- Somewhat confident
- Quite confident
- Extremely confident

## 4. How much effort do you put into helping your child learn to do things for himself/herself?

- Almost no effort
- A little bit of effort
- Some effort
- Quite a bit of effort
- A tremendous amount of effort

## 5. In the past year, how often have you discussed your child's school with other parents from the school?

- Almost never
- Once or twice
- Every few months
- Monthly
- Weekly or more

## K-12 Parent Survey

### **6. How often do you help your child understand the content he or she is learning in school?**

- Almost never
- Once in a while
- Sometimes
- Frequently
- Almost all the time

### **7. In the past year, how often have you helped out at your child's school?**

- Almost never
- Once or twice
- Every few months
- Monthly
- Weekly or more

### **8. How often do you help your child engage in activities which are educational outside the home?**

- Almost never
- Once in a while
- Sometimes
- Frequently
- Almost all the time

### **9. How confident are you in your ability to make sure your child's school meets your child's learning needs?**

- Not confident at all
- Slightly confident
- Somewhat confident
- Quite confident
- Extremely confident

## K-12 Parent Survey

### **10. In the past year, how often have you visited your child's school?**

- Almost never
- Once or twice
- Every few months
- Monthly
- Weekly or more

### **11. How often do you and your child talk when he or she is having a problem with others?**

- Almost never
- Once in a while
- Sometimes
- Frequently
- Almost all the time

### **12. How confident are you in your ability to support your child's learning at home?**

- Not confident at all
- Slightly confident
- Somewhat confident
- Quite confident
- Extremely confident

### **13. To what extent do you know how your child is doing socially at school?**

- Not at all
- A little bit
- Somewhat
- Quite a bit
- A tremendous amount

## K-12 Parent Survey

**14. How confident are you in your ability to help your child deal with his or her emotions appropriately?**

- Not confident at all
- Slightly confident
- Somewhat confident
- Quite confident
- Extremely confident

**15. Do you have any comments about any of your answers to the questions in this section?**

## K-12 Parent Survey

In this section, we'd like to learn more about your perceptions of your child and your child's interactions with his/her school.

### **16. How well do the activities offered at your child's school match his or her interests?**

- Not well at all
- Mildly well
- Fairly well
- Quite well
- Extremely well

### **17. On average, how well does your child work independently on learning activities at home?**

- Not well at all
- Mildly well
- Fairly well
- Quite well
- Extremely well

### **18. How well do the teaching styles of your child's teachers match your child's learning style?**

- Not well at all
- Mildly well
- Fairly well
- Quite well
- Extremely well

### **19. At your child's school, how well does the overall approach to discipline work for your child?**

- Not well at all
- Mildly well
- Fairly well
- Quite well
- Extremely well

## K-12 Parent Survey

### **20. How much effort does your child put into school-related tasks?**

- Almost no effort
- A little bit of effort
- Some effort
- Quite a bit of effort
- A tremendous amount of effort

### **21. How much of a sense of belonging does your child feel at his or her school?**

- No belonging at all
- A little bit of belonging
- Some belonging
- Quite a bit of belonging
- A tremendous amount of belonging

### **22. How regularly does your child read for fun?**

- Almost never
- Once in a while
- Sometimes
- Frequently
- Almost all the time

### **23. How well do you feel your child's school is preparing him or her for his or her next academic year?**

- Not well at all
- Mildly well
- Fairly well
- Quite well
- Extremely well



## K-12 Parent Survey

**24. In general, how well does your child learn from feedback about his or her work?**

- Not well at all
- Mildly well
- Fairly well
- Quite well
- Extremely well

**25. Do you have any comments about any of your answers to the questions in this section?**

## K-12 Parent Survey

In this section, we'd like to learn more about your perceptions of the overall climate at your child's school.

### **26. To what extent do you think that children enjoy going to your child's school?**

- Not at all
- A little bit
- Somewhat
- Quite a bit
- A tremendous amount

### **27. How much does the school value diversity of children's backgrounds?**

- Not at all
- A little bit
- Some
- Quite a bit
- A tremendous amount

### **28. How motivating are the classroom lessons at your child's school?**

- Not at all motivating
- Slightly motivating
- Somewhat motivating
- Quite motivating
- Extremely motivating

### **29. How well do administrators at your child's school create a school environment that helps children learn?**

- Not well at all
- Mildly well
- Fairly well
- Quite well
- Extremely well

## K-12 Parent Survey

**30. Overall, how much respect do you think the teachers at your child's school have for the children?**

- Almost no respect
- A little bit of respect
- Some respect
- Quite a bit of respect
- A tremendous amount of respect

**31. Do you have any comments about any of your answers to the questions in this section?**

# K-12 Parent Survey

We would like to know more about you. Please take a few moments to answer the following questions.

## 32. What is your gender?

- Female
- Male

## 33. What is your child's gender?

- Female
- Male

## 34. Which race/ethnicity best describes you? (Please choose only one.)

- American Indian or Alaskan Native
- Asian / Pacific Islander
- Black or African American
- Hispanic American
- White / Caucasian
- Multiple ethnicity / Other (please specify)

## 35. Please describe your race/ethnicity.

## 36. What grade is your child in?

# K-12 Parent Survey

## 37. What is your relationship to your child?

- Mother
- Father
- Step-mother
- Step-father
- Grandmother
- Grandfather
- Aunt
- Uncle
- Guardian
- Other

## 38. Please describe your relationship to your child.

## 39. Which race/ethnicity best describes your child? (Please choose only one.)

- American Indian or Alaskan Native
- Asian / Pacific Islander
- Black or African American
- Hispanic American
- White / Caucasian
- Multiple ethnicity / Other (please specify)

## 40. Please describe your child's race/ethnicity.

## 41. What year were you born?

## K-12 Parent Survey

**42. What was the primary language spoken in your childhood home? (Please choose only one.)**

- Chinese
- English
- French
- German
- Italian
- Korean
- Russian
- Spanish
- Tagalog
- Vietnamese
- Other/multiple languages (please specify)

**43. Please describe what language(s) were primarily spoken in your childhood home.**

**44. What is the primary language you speak with your child currently? (Please choose only one.)**

- Chinese
- English
- French
- German
- Italian
- Korean
- Russian
- Spanish
- Tagalog
- Vietnamese
- Other/multiple languages (please specify)

## K-12 Parent Survey

**45. Please describe what language(s) you speak with your child currently.**

**46. What is the highest level of education you have completed?**

**47. What is your approximate average household income?**

- \$0-\$24,999
- \$25,000-\$49,999
- \$50,000-\$74,999
- \$75,000-\$99,999
- \$100,000-\$124,999
- \$125,000-\$149,999
- \$150,000-\$174,999
- \$175,000-\$199,999
- \$200,000 and up

**48. Do you have any other comments, questions, or concerns?**

# School Climate Survey

## 1. To what extent do you think that children enjoy going to your child's school?

- Not at all
- A little bit
- Somewhat
- Quite a bit
- A tremendous amount

## 2. How much does the school value diversity of children's backgrounds?

- Not at all
- A little bit
- Some
- Quite a bit
- A tremendous amount

## 3. Overall, how much respect do you think the children at your child's school have for the staff?

- Almost no respect
- A little bit of respect
- Some respect
- Quite a bit of respect
- A tremendous amount of respect

## 4. How motivating are the classroom lessons at your child's school?

- Not at all motivating
- Slightly motivating
- Somewhat motivating
- Quite motivating
- Extremely motivating



# School Climate Survey

## 5. How well do administrators at your child's school create a school environment that helps children learn?

- Not well at all
- Mildly well
- Fairly well
- Quite well
- Extremely well

## 6. Overall, how much respect do you think the teachers at your child's school have for the children?

- Almost no respect
- A little bit of respect
- Some respect
- Quite a bit of respect
- A tremendous amount of respect

## 7. How fair or unfair is the school's system of evaluating children?

- Very unfair
- Somewhat unfair
- Slightly unfair
- Neither fair nor unfair
- Slightly fair
- Somewhat fair
- Very fair

# K-12 Teacher Feedback Template

## 1. How easy is it to get the resources you need to teach at this school?

- Extremely easy
- Very easy
- Moderately easy
- Slightly easy
- Not at all easy

## 2. How safe do you feel teaching at this school?

- Extremely safe
- Quite safe
- Moderately safe
- Slightly safe
- Not at all safe

## 3. How often do parents pressure you to change their children's grades?

- Extremely often
- Quite often
- Moderately often
- Slightly often
- Not at all often

## 4. How useful is the feedback the principal at this school gives you?

- Extremely useful
- Quite useful
- Moderately useful
- Slightly useful
- Not at all useful

# K-12 Teacher Feedback Template

## 5. How much support does the administration at this school give to the teaching staff?

- A great deal
- A lot
- A moderate amount
- A little
- None at all

## 6. How much support do the parents with children at this school give to the teaching staff?

- A great deal
- A lot
- A moderate amount
- A little
- None at all

## 7. How much support do you feel the parents of your students give you?

- A great deal of support
- A lot of support
- A moderate amount of support
- A little support
- Not any support at all

## 8. How reasonable are the expectations for student achievement at this school?

- Extremely reasonable
- Very reasonable
- Moderately reasonable
- Slightly reasonable
- Not at all reasonable

# K-12 Teacher Feedback Template

## 9. Does this school give too much attention to standardized tests, too little attention to them, or about the right amount of attention to them?

- Much too much
- Somewhat too much
- Slightly too much
- About the right amount
- Slightly too little
- Somewhat too little
- Much too little

## 10. How well do teachers at this school collaborate with each other?

- Extremely well
- Very well
- Moderately well
- Slightly well
- Not at all well

## 11. How much attention does this school give to your professional growth?

- A great deal
- A lot
- A moderate amount
- A little
- None at all

## 12. How much financial assistance does this school provide you with for professional growth opportunities?

- A great deal
- A lot
- A moderate amount
- A little
- None at all

## K-12 Teacher Feedback Template

**13. Overall, are you satisfied with the teaching experience at this school, neither satisfied nor dissatisfied with it, or dissatisfied with it?**

- Extremely satisfied
- Moderately satisfied
- Slightly satisfied
- Neither satisfied nor dissatisfied
- Slightly dissatisfied
- Moderately dissatisfied
- Extremely dissatisfied

## What is a Character Growth Card?

---

The CGC is a school-based assessment developed to help middle school teachers provide students with formative feedback on skills that researchers and teachers alike have linked with success. We believe these questions are a useful springboard for teaching and learning activities related to a young person's development of character skills. It is not appropriate for diagnosing or comparing children. We do not yet have evidence that it is a valid tool for evaluating programs or schools.

The skills on this card fall into three major categories: social character, which facilitates harmonious relationships with other people and is exemplified by social intelligence and gratitude; achievement character, sometimes termed performance character, which facilitates the achievement of personal goals and is exemplified by grit; and intellectual character, which facilitates learning and is exemplified by curiosity. Some skills relate to two categories. For example, self-control is both interpersonal and an achievement strength; zest is both interpersonal and a learning strength; and, finally, optimism relates both to achievement and learning.

## Why these skills?

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The skills and behaviors on this card have been shown either to contribute to success in school and life, or are important ends in themselves in the context of K–12 education.

For each of these skills, there is at least some evidence that they can be cultivated, thus making them an especially important target for families and educators interested in supporting student growth and development.

## How should I use this card?

---

When working with children, adults who use this tool find it helpful to:

- *Discuss the differences and similarities between their scores and a child's self-ratings for each skill area.*
- *Return to this card on a quarterly basis as a way to emphasize that over time, these skills can grow and change.*
- *Discuss whether scores have changed over time and a child's perceptions about the source of this change. Has the child's behavior changed? Or perhaps have the child's personal standards changed? For example, children who become more aware of self-control skills may wish to change their self-control rating after several months of personal observation and reflection, even if their behavior itself has not changed much.*
- *Discuss different situations or environments when ratings might be different than the norm. For example, a child might say that he or she is normally a 5 on self control, but when it comes to playing on the baseball team, he or she would give herself a 1 or 2 in this area.*

Again, please note that this card should **not** be used to diagnose or compare children, nor to compare schools or programs. Rather please use it to help children focus on their own growth and development in these areas, and as a conversation starter.

# CHARACTER GROWTH CARD

■ Q1 ■ Q2 ■ Q3 ■ Q4

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STUDENT NAME \_\_\_\_\_

---

GRADE \_\_\_\_\_ SCHOOL \_\_\_\_\_ DATE \_\_\_\_\_

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1 = Almost Never · 2 = Very Rarely · 3 = Rarely · 4 = Sometimes · 5 = Often · 6 = Very Often · 7 = Almost Always

	SELF-ASSESSMENT	AVERAGE TEACHER SCORE	TEACHER 1	TEACHER 2	TEACHER 3	TEACHER 4	TEACHER 5
<b>GRIT</b> Finished whatever s/he began Stuck with a project or activity for more than a few weeks Tried very hard even after experiencing failure Stayed committed to goals Kept working hard even when s/he felt like quitting							
<b>OPTIMISM</b> Believed that effort would improve his/her future When bad things happened, s/he thought about things they could do to make it better next time Stayed motivated, even when things didn't go well Believed that s/he could improve on things they weren't good at							
<b>SELF CONTROL</b> ( <i>school work</i> ) Came to class prepared Remembered and followed directions Got to work right away instead of waiting until the last minute Paid attention and resisted distractions							
<b>SELF CONTROL</b> ( <i>interpersonal</i> ) Remained calm even when criticized or otherwise provoked Allowed others to speak without interrupting Was polite to adults and peers Kept temper in check							
<b>GRATITUDE</b> Recognized what other people did for them Showed appreciation for opportunities Expressed appreciation by saying thank you Did something nice for someone else as a way of saying thank you							
<b>SOCIAL INTELLIGENCE</b> Was able to find solutions during conflicts with others Showed that s/he cared about the feelings of others Adapted to different social situations							
<b>CURIOSITY</b> Was eager to explore new things Asked questions to help s/he learn better Took an active interest in learning							
<b>ZEST</b> Actively participated Showed enthusiasm Approached new situations with excitement and energy							

### Mathematics

Summary	
Total Students With Valid Growth Test Scores	50
Mean RIT	160.2
Standard Deviation	14.5
District Grade Level Mean RIT	160.2
Students At or Above District Grade Level Mean RIT	25
Norm Grade Level Mean RIT	159.1
Students At or Above Norm Grade Level Mean RIT	29

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Mathematics	10	20%	3	6%	14	28%	14	28%	9	18%	158-160-162	14.5

### Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term. Due to statistical unreliability, summary data for groups of less than 10 are not shown.  
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### Mathematics

#### MAP: Math Primary Grades CA 2010 (CCSS) / CA Common Core Mathematics K-12: 2010

Summary	
Total Students With Valid Growth Test Scores	50
Mean RIT	160.2
Standard Deviation	14.5
District Grade Level Mean RIT	160.2
Students At or Above District Grade Level Mean RIT	25
Norm Grade Level Mean RIT	159.1
Students At or Above Norm Grade Level Mean RIT	29

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
<b>Overall Performance</b>												
MAP: Math Primary Grades CA 2010 (CCSS) / CA Common Core Mathematics K-12: 2010	10	20%	3	6%	14	28%	14	28%	9	18%	158-160-162	14.5
<b>Goal Area</b>												
Operations and Algebraic Thinking	8	16%	3	6%	12	24%	9	18%	18	36%	161-164-166	15.4
Number and Operations	11	22%	7	14%	10	20%	11	22%	11	22%	157-160-162	16.9
Measurement and Data	13	26%	6	12%	9	18%	14	28%	8	16%	155-157-159	14.4
Geometry	8	16%	11	22%	9	18%	13	26%	9	18%	157-160-162	16.9

#### Explanatory Notes

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### Reading

Summary	
Total Students With Valid Growth Test Scores	49
Mean RIT	158.4
Standard Deviation	11.7
District Grade Level Mean RIT	158.4
Students At or Above District Grade Level Mean RIT	20
Norm Grade Level Mean RIT	157.7
Students At or Above Norm Grade Level Mean RIT	23

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Reading	8	16%	13	27%	11	22%	10	20%	7	14%	157-158-160	11.7

### Explanatory Notes

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### Reading

#### MAP: Reading Primary Grades CA 2010 (CCSS) / CA Common Core English Language Arts K-12: 2010

Summary	
Total Students With Valid Growth Test Scores	49
Mean RIT	158.4
Standard Deviation	11.7
District Grade Level Mean RIT	158.4
Students At or Above District Grade Level Mean RIT	20
Norm Grade Level Mean RIT	157.7
Students At or Above Norm Grade Level Mean RIT	23

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
<b>Overall Performance</b>												
MAP: Reading Primary Grades CA 2010 (CCSS) / CA Common Core English Language Arts K-12: 2010	8	16%	13	27%	11	22%	10	20%	7	14%	157-158-160	11.7
<b>Goal Area</b>												
<b>Foundational Skills</b>	10	20%	7	14%	8	16%	11	22%	13	27%	157-159-161	12.8
<b>Language and Writing</b>	13	27%	12	24%	12	24%	4	8%	8	16%	155-157-159	12.3
<b>Literature and Informational</b>	15	31%	8	16%	4	8%	14	29%	8	16%	155-157-160	15.7
<b>Vocabulary Use and Functions</b>	9	18%	9	18%	11	22%	8	16%	12	24%	158-160-162	13.8

#### Explanatory Notes

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### Mathematics

Summary	
Total Students With Valid Growth Test Scores	46
Mean RIT	182
Standard Deviation	16
District Grade Level Mean RIT	182
Students At or Above District Grade Level Mean RIT	29
Norm Grade Level Mean RIT	179
Students At or Above Norm Grade Level Mean RIT	31

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Mathematics	6	13%	7	15%	7	15%	12	26%	14	30%	180-182-184	16

### Explanatory Notes

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### Mathematics

#### MAP: Math Primary Grades CA 2010 (CCSS) / CA Common Core Mathematics K-12: 2010

Summary	
Total Students With Valid Growth Test Scores	46
Mean RIT	182
Standard Deviation	16
District Grade Level Mean RIT	182
Students At or Above District Grade Level Mean RIT	29
Norm Grade Level Mean RIT	179
Students At or Above Norm Grade Level Mean RIT	31

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
<b>Overall Performance</b>												
MAP: Math Primary Grades CA 2010 (CCSS) / CA Common Core Mathematics K-12: 2010	6	13%	7	15%	7	15%	12	26%	14	30%	180-182-184	16
<b>Goal Area</b>												
Operations and Algebraic Thinking	4	9%	6	13%	14	30%	4	9%	18	39%	182-185-187	16.8
Number and Operations	5	11%	4	9%	5	11%	7	15%	25	54%	184-186-189	16.3
Measurement and Data	12	26%	8	17%	6	13%	10	22%	10	22%	176-178-181	16.8
Geometry	8	17%	7	15%	9	20%	11	24%	11	24%	176-179-182	19.1

#### Explanatory Notes

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### Reading

Summary	
Total Students With Valid Growth Test Scores	34
Mean RIT	174.7
Standard Deviation	13.7
District Grade Level Mean RIT	174.7
Students At or Above District Grade Level Mean RIT	16
Norm Grade Level Mean RIT	176.9
Students At or Above Norm Grade Level Mean RIT	14

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Reading	6	18%	10	29%	6	18%	7	21%	5	15%	172-175-177	13.7

### Explanatory Notes

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### Reading

#### MAP: Reading Primary Grades CA 2010 (CCSS) / CA Common Core English Language Arts K-12: 2010

Summary	
Total Students With Valid Growth Test Scores	34
Mean RIT	174.7
Standard Deviation	13.7
District Grade Level Mean RIT	174.7
Students At or Above District Grade Level Mean RIT	16
Norm Grade Level Mean RIT	176.9
Students At or Above Norm Grade Level Mean RIT	14

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
<b>Overall Performance</b>												
MAP: Reading Primary Grades CA 2010 (CCSS) / CA Common Core English Language Arts K-12: 2010	6	18%	10	29%	6	18%	7	21%	5	15%	172-175-177	13.7
<b>Goal Area</b>												
Foundational Skills	10	29%	5	15%	7	21%	5	15%	7	21%	171-174-176	15
Language and Writing	9	26%	9	26%	6	18%	3	9%	7	21%	172-175-178	14.8
Literature and Informational	8	24%	8	24%	2	6%	11	32%	5	15%	172-175-179	18.3
Vocabulary Use and Functions	6	18%	12	35%	4	12%	6	18%	6	18%	172-175-177	13.4

#### Explanatory Notes

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### Mathematics

Summary	
Total Students With Valid Growth Test Scores	47
Mean RIT	203.5
Standard Deviation	20.1
District Grade Level Mean RIT	203.5
Students At or Above District Grade Level Mean RIT	30
Norm Grade Level Mean RIT	191.3
Students At or Above Norm Grade Level Mean RIT	38

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Mathematics	6	13%	1	2%	4	9%	5	11%	31	66%	201-204-206	20.1

### Explanatory Notes

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### Mathematics

#### MAP: Math Primary Grades CA 2010 (CCSS) / CA Common Core Mathematics K-12: 2010

Summary	
Total Students With Valid Growth Test Scores	47
Mean RIT	203.5
Standard Deviation	20.1
District Grade Level Mean RIT	203.5
Students At or Above District Grade Level Mean RIT	30
Norm Grade Level Mean RIT	191.3
Students At or Above Norm Grade Level Mean RIT	38

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
<b>Overall Performance</b>												
MAP: Math Primary Grades CA 2010 (CCSS) / CA Common Core Mathematics K-12: 2010	6	13%	1	2%	4	9%	5	11%	31	66%	201-204-206	20.1
<b>Goal Area</b>												
Operations and Algebraic Thinking	4	9%	4	9%	0	0%	3	6%	36	77%	211-215-218	23.6
Number and Operations	3	6%	2	4%	3	6%	1	2%	38	81%	207-210-213	19.6
Measurement and Data	8	17%	4	9%	1	2%	5	11%	29	62%	198-201-204	20.2
Geometry	8	17%	9	20%	7	15%	10	22%	12	26%	189-192-195	19.3

#### Explanatory Notes

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### Reading

Summary	
Total Students With Valid Growth Test Scores	46
Mean RIT	191.4
Standard Deviation	14.7
District Grade Level Mean RIT	191.4
Students At or Above District Grade Level Mean RIT	23
Norm Grade Level Mean RIT	189.6
Students At or Above Norm Grade Level Mean RIT	24

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Reading	7	15%	10	22%	8	17%	8	17%	13	28%	189-191-194	14.7

### Explanatory Notes

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### Reading

#### MAP: Reading Primary Grades CA 2010 (CCSS) / CA Common Core English Language Arts K-12: 2010

Summary	
Total Students With Valid Growth Test Scores	46
Mean RIT	191.4
Standard Deviation	14.7
District Grade Level Mean RIT	191.4
Students At or Above District Grade Level Mean RIT	23
Norm Grade Level Mean RIT	189.6
Students At or Above Norm Grade Level Mean RIT	24

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
<b>Overall Performance</b>												
MAP: Reading Primary Grades CA 2010 (CCSS) / CA Common Core English Language Arts K-12: 2010	7	15%	10	22%	8	17%	8	17%	13	28%	189-191-194	14.7
<b>Goal Area</b>												
Foundational Skills	7	15%	12	26%	5	11%	9	20%	13	28%	188-191-194	17.1
Language and Writing	9	20%	10	22%	7	15%	8	17%	12	26%	189-191-193	14.5
Literature and Informational	6	13%	11	24%	8	17%	9	20%	12	26%	189-191-194	15.7
Vocabulary Use and Functions	5	11%	11	24%	9	20%	10	22%	11	24%	190-192-194	15.4

#### Explanatory Notes

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### Mathematics

Summary	
Total Students With Valid Growth Test Scores	49
Mean RIT	207.6
Standard Deviation	11.2
District Grade Level Mean RIT	207.6
Students At or Above District Grade Level Mean RIT	25
Norm Grade Level Mean RIT	203.1
Students At or Above Norm Grade Level Mean RIT	32

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Mathematics	3	6%	7	14%	12	24%	16	33%	11	22%	206-208-209	11.2

### Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term. Due to statistical unreliability, summary data for groups of less than 10 are not shown.  
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### Mathematics

#### MAP: Math 2-5 CA 2010 (CCSS) / CA Common Core Mathematics K-12: 2010

Summary	
Total Students With Valid Growth Test Scores	49
Mean RIT	207.6
Standard Deviation	11.2
District Grade Level Mean RIT	207.6
Students At or Above District Grade Level Mean RIT	25
Norm Grade Level Mean RIT	203.1
Students At or Above Norm Grade Level Mean RIT	32

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
<b>Overall Performance</b>												
MAP: Math 2-5 CA 2010 (CCSS) / CA Common Core Mathematics K-12: 2010	3	6%	7	14%	12	24%	16	33%	11	22%	206-208-209	11.2
<b>Goal Area</b>												
Operations and Algebraic Thinking	5	10%	4	8%	9	18%	11	22%	20	41%	209-211-213	13.9
Number and Operations	5	10%	6	12%	15	31%	15	31%	8	16%	205-207-208	12.2
Measurement and Data	4	8%	5	10%	8	16%	19	39%	13	27%	208-210-212	13.6
Geometry	7	14%	10	20%	16	33%	9	18%	7	14%	202-203-205	10.7

#### Explanatory Notes

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### Reading

Summary	
Total Students With Valid Growth Test Scores	51
Mean RIT	203.8
Standard Deviation	13.9
District Grade Level Mean RIT	203.8
Students At or Above District Grade Level Mean RIT	24
Norm Grade Level Mean RIT	199.2
Students At or Above Norm Grade Level Mean RIT	31

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Reading	5	10%	7	14%	15	29%	8	16%	16	31%	202-204-206	13.9

### Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term. Due to statistical unreliability, summary data for groups of less than 10 are not shown.  
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### Reading

#### MAP: Reading 2-5 CA 2010 (CCSS) / CA Common Core English Language Arts K-12: 2010

Summary	
Total Students With Valid Growth Test Scores	51
Mean RIT	203.8
Standard Deviation	13.9
District Grade Level Mean RIT	203.8
Students At or Above District Grade Level Mean RIT	24
Norm Grade Level Mean RIT	199.2
Students At or Above Norm Grade Level Mean RIT	31

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
<b>Overall Performance</b>												
MAP: Reading 2-5 CA 2010 (CCSS) / CA Common Core English Language Arts K-12: 2010	5	10%	7	14%	15	29%	8	16%	16	31%	202-204-206	13.9
<b>Goal Area</b>												
Literature	10	20%	4	8%	10	20%	9	18%	18	35%	202-204-207	16.1
Informational Text	4	8%	11	22%	12	24%	10	20%	14	27%	201-203-204	13.4
Foundational Skills and Vocabulary	5	10%	8	16%	13	25%	6	12%	19	37%	202-205-207	15

#### Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term. Due to statistical unreliability, summary data for groups of less than 10 are not shown.  
 \* This data is not available for reporting. Please refer to help and documentation for more information.  
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# Common Core MAP for Primary Grades (MPG) Assessment Content

## Reading & Mathematics, K – 2



**MAP® for Primary Grades (MPG) is not a single assessment, but a suite that comes with three computer-based assessment components:**

- Screening
- Skills Checklists
- Survey with Goals

Survey with Goals (adaptive, appropriate for universal screening and growth measurement) is the central component, which can be supplemented with use of the Screening tests and Skills Checklists to dig more deeply into foundational skills throughout the year.

The **Screening** assessments provide baseline information for new students in the earliest stages of learning (e.g. in Kindergarten).

The **Skills Checklist** assessments provide information about specific skills and concepts (e.g. phonological awareness, phonics and concepts of print within reading and number sense and computation within mathematics). They can be administered as many times as necessary during the school year, at the teacher’s discretion. For instance, they can be used in between growth assessments to determine which skills require the greatest focus.

Just like the Survey with Goals assessment within MAP, **Survey with Goals** within MPG is recognized by the National Center for RTI as a universal screening tool. It adapts to the level of difficulty appropriate for each student, and is designed to be administered three times a year (fall, winter, spring). It provides growth data (using the stable RIT scale to track growth within and across grades), and a Lexile® range for reading. Teachers use this adaptive assessment to identify skills most appropriate for instruction based on each student’s performance, regardless of whether the student is at, above, or below grade level. The key content areas covered are:

### Literacy

Phonological Awareness  
Phonics  
Concepts of Print  
Vocabulary and Word Structure  
Comprehension  
Writing

### Mathematics

Problem Solving  
Number Sense  
Computation  
Measurement and Geometry  
Statistics and Probability  
Algebra

Following is a breakdown of the skills assessed in each of these three MAP for Primary Grades assessments.

## Screening

*There are two screening assessments: one for early literacy and another for mathematics. The numbers in parentheses represent the number of items on each assessment.*

### Early Literacy (33 items)

#### Phonological Awareness

Matching Sounds  
Rhyming  
Manipulating Sounds

#### Visual Discrimination/Phonics

Visual Discrimination  
Letter Identifications  
Matching Sounds to Letters

#### Concepts of Print

Understanding Pre-Reading Behaviors  
Orientation to the Page  
Identify Title/Author  
Counting Words

### Early Numeracy (34 items)

#### Number Sense

Rote Counting - Counts to a Number  
One-to-One Correspondence 1-10, 11-20  
Matches and Identifies Numerals 1-10, 11-20  
Identifies Numbers of Objects - More/Fewer

#### Computation

Computes with Manipulatives - Moving Objects  
Computes with Manipulatives - Numerical Answer



# Skills Checklists

There is an individual assessment for each skill area (each identified by a separate box below). The numbers in parentheses represent the number of items on each assessment.

## Reading

### Phonological Awareness (37)

Rhyming  
Identifying Number of Syllables (one, two, and three)  
Blending

### Letter Identification (54)

Upper Case and Lower Case

### Phonemic Awareness: Phoneme Identification (46)

Initial and Final Consonants  
Middle Vowels

### Phonemic Awareness: Manipulation of Sounds (37)

Blending of Sounds  
Substitution of Sounds: Beginning, Middle, and End  
Deletion of Sounds

### Phonics: Matching Letters to Sounds (33)

Consonant and Vowel Sounds

### Syllable Types: Vowel, Digraphs/Diphthongs (23)

Digraphs and Diphthongs

### Syllable Types: CVC, CVCe, R-Controlled (16)

CVC and CVCe  
R-Controlled

### Decoding Consonant Blends/Digraphs (49)

Initial and Final Blends  
Initial and Final Digraphs

### Decoding: Spelling Patterns/Word Families (20)

Word Families

### Decoding: Multi-Syllable Words, Affixes, Open/C+le (33)

Inflectional Endings  
Prefixes and Suffixes  
Open and Closed/C+le Syllables

## Mathematics

### Number Sense to 10 - Counting, Ordering, Place Value (35)

Counts to 10 - forwards and backwards  
One-to-one correspondence  
Identifies position - first, last and 1st -10th  
Compares numbers using words  
Groups objects into 10s

### Number Sense to 10 - Identifying/Representing (38)

Names numerals  
Represents numerals correctly  
Composes and decomposes numbers  
Identifies or represents whole, part of, half  
Identifies a penny, a nickel, and a dime  
Identifies name of coin worth 1¢, 5¢, 10¢

### Number Sense to 20 - Counting, Place Value (27)

Counts by 1s, 2s, and 5s  
Counts backwards  
Counts on from any number by 1s  
One-to-one correspondence  
Groups objects into 10s and 1s

### Number Sense to 20 - Ordering (32)

Identifies position - 11th to 20th  
Compares numbers 1-20 using words  
Identifies number 1 more/less than a given number  
Identifies numbers between two given numbers  
Compares the value of one coin to another - penny, nickel, dime

### Number Sense to 100 - Counting (23)

Counts on by 1s, 2s, 5s, and 10s  
Counts by 10s to 100

### Number Sense to 100 - Identifying/Representing (38)

Identifies numerals and represents numbers  
Composes and decomposes numbers  
Identifies multiple ways of representing numbers  
Fractions - thirds  
Money

### Number Sense to 100 - Ordering (27)

Compares numbers  
Identifies number 1 > and < a given number  
Identifies numbers between two given numbers  
Orders and compares the value of coins

### Number Sense to 100 - Place Value (22)

Identifies standard form name  
Identifies number of sets given pictures  
Identifies number of sets given numbers  
Reorganizes groups of 10s and 1s

**Number Sense to 1000 - Counting (26)**

Counts by 3s  
 Counts on by 2s and 5s  
 Counts by 10s and 100s from numbers < 100 and > 100  
 Counts by 10s from any multiple of 10  
 Counts on by 10s from any number

**Number Sense to 1000 - Identifying/Representing (34)**

Identifies numerals and represents numbers  
 Composes and decomposes  
 Multiple ways of representing numbers  
 Fractions - eighths  
 Money

**Number Sense to 20 - Identifying/Representing (38)**

Identifies numerals and represents numbers  
 Composes and decomposes numbers  
 Identifies multiple ways of representing numbers  
 Identifies or represents  $\frac{1}{4}$ ,  $\frac{2}{4}$ ,  $\frac{3}{4}$ ,  $\frac{4}{4}$

**Number Sense to 1000 - Ordering (37)**

Compares numbers using words and symbols  
 Identifies number 10 less/more than a given number  
 Identifies number 100 less/more than a given number  
 Identifies numbers between two given numbers

**Number Sense to 1000 - Place Value (23)**

Groups objects into 100s, 10s, and 1s  
 Identifies the number of 100s, 10s, and 1s in a number  
 Identifies the standard form of a number from expanded form  
 Identifies multiple ways of showing the same number using place value

**Computation to 10 - Using Manipulatives (22)**

Addition: Computation and story problems - using manipulatives  
 Subtraction: Computation and story problems - using manipulatives

**Computation to 10 - Using Numbers (27)**

Addition - two 1-digit numbers - horizontal and vertical  
 Addition - three 1-digit numbers  
 Subtraction - two 1-digit numbers - horizontal and vertical

**Computation to 10 - Problem Solving (12)**

Addition: story problems  
 Subtraction: story problems

**Computation to 20 - Using Manipulatives (22)**

Addition: Computation and story problems - using manipulatives  
 Subtraction: Computation and story problems - using manipulatives

**Computation to 20 - Using Numbers (27)**

Addition - two 1-digit numbers - horizontal and vertical  
 Addition - three 1-digit numbers  
 Subtraction - two 1-digit numbers - horizontal and vertical

**Computation to 20 - Problem Solving (12)**

Addition: story problems  
 Subtraction: story problems

**Computation to 100 - No Regrouping - Using Manipulatives (22)**

Addition and Subtraction - using manipulatives  
 Multiplication - using manipulatives  
 Division - using manipulatives

**Computation to 100 - No Regrouping - Using Numbers (37)**

Addition - 1- or 2-digit numbers - horizontal/vertical  
 Addition - multiple 1- and 2-digit numbers  
 Subtraction - two 1- or 2-digit numbers - horizontal/vertical  
 Multiplication - basic facts - horizontal/vertical

**Computation to 100 - No Regrouping - Problem Solving (27)**

Addition: story problems  
 Subtraction: story problems

**Computation to 100 - w/Regrouping - Using Manipulatives (22)**

Addition and Subtraction - using manipulatives  
 Multiplication - using manipulatives  
 Division - using manipulatives

**Computation to 100 - w/Regrouping - Using Numbers (37)**

Addition - two 1- or 2- digit numbers - horizontal and vertical  
 Addition - multiple 1- and 2- digit numbers  
 Subtraction - two 1- or 2- digit numbers - horizontal and vertical  
 Multiplication - 2- digit numbers < 20 by a 1-digit number  
 Division - basic facts

**Computation to 100 - w/Regrouping - Plm. Solving/Estim. (39)**

Addition: story problems and estimation  
 Subtraction: story problems and estimation

**Computation to 1000 - Using Manipulatives (22)**

Addition, Subtraction, and Multiplication - using manipulatives  
 Division - using manipulatives (with remainders)

**Computation to 1000 - Using Numbers (23)**

Addition - sums to 1000  
 Subtraction - minuend < 1000  
 Multiplication - 2- or 3-digit number by a 1- or 2-digit number  
 Division - numbers 100 or less by a 1- or 2-digit number

**Computation to 1000 - Problem Solving and Estimation (34)**

Addition: story problems and estimation  
 Subtraction: story problems and estimation  
 Multiplication: story problems  
 Division: story problem

## Survey with Goals (Adaptive)

*Survey with Goals is a single assessment in each subject, Reading and Mathematics. There are 48-56 items in each subject that count toward the student's score (8-14 items per goal area), plus several field test items that do not count toward the score. Each green box represents a goal area, as well as the respective sub-goals.*

### Reading

#### Foundational Skills

Phonics and Word Recognition  
Phonological Awareness  
Print Concepts

#### Language and Writing

Capitalize, Spell, Punctuate  
Language: Grammar, Usage  
Writing: Purposes: Plan, Develop, Edit

#### Literature and Informational

Informational Text: Key Ideas, Details, Craft, Structure  
Literature: Key Ideas, Craft, Structure

#### Vocabulary Use and Functions

Language: Context Clues and References  
Vocabulary Acquisition and Use

### Mathematics

#### Operations and Algebraic Thinking

Represent and Solve Problems  
Properties of Operations

#### Number and Operations

Understand Place Value, Counting, and Cardinality  
Number and Operations: Base Ten and Fractions

#### Measurement and Data

Solve Problems Involving Measurement  
Represent and Interpret Data

#### Geometry

Reason with Shapes and Their Attributes

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**Board of Directors**  
**Thursday, August 21, 2014**  
**AGENDA ITEM INFORMATION**

<b>Agenda Items</b>	Board Development
<b>Time Allotted</b>	15 minutes
<b>Summary</b>	Board Development Committee will lead a discussion on next steps related to Board development.
<b>Type</b>	Discussion
<b>Background</b>	We currently have two open seats and have been talking with a number of eligible candidates. Our goal is to elect 2 new directors at the September Board meeting.
<b>Key Questions</b>	<ul style="list-style-type: none"><li>• What are the next steps on current candidates?</li><li>• Can we identify additional candidates?</li><li>• Do we need to update our Board skills matrix?</li></ul>
<b>Attachments</b>	<ul style="list-style-type: none"><li>• None</li></ul>



**Yu Ming Board of Directors: Compensation Committee**  
**2014-2015 School Year**  
*As of September 15, 2014*

**COMPENSATION COMMITTEE DESCRIPTION**

*As approved by Board of Directors on October 15, 2012*

**Overall Role:**

The Compensation Committee leads the annual process for evaluating performance and setting compensation for the Principal and other executive staff.

**Appointments:**

- A minimum of two member of the Board of Directors shall serve on the Compensation Committee, one of whom shall be the Chair of the Compensation Committee.
- Additional members who may be appointed need not be on the Board of Directors, as long as they have relevant K-12 administrative and HR expertise, experience, and capacity to serve
- Appointments of the Chair shall be made annually in accordance with the bylaws.

**Responsibilities:**

- To establish a comprehensive compensation policy for the school principal and other executive staff.
- To establish, review and recommend revision, as needed, performance expectations for the school principal.
- To provide an annual formal written evaluation for the school principal.
- To evaluate suitability of compensation package for the school principal and recommend to the board any adjustments needed.

**PLAN FOR 2014-2015**

**Members**

The Compensation Committee for 2014-2015 will include 3-4 members in total, including two Yu Ming Board members and members with relevant professional expertise. Members are asked to make a commitment for the school year. The committee will consult with other expert advisors as needed.

*Expertise needed:*

- Experience as a successful K-8 school site leader
- Experience supervising and developing principals for K-8 public schools
- Knowledge of best practices in human resources management
- Knowledge of local hiring market conditions in education

*2014-2015 Members (to be confirmed):*

- Chair: Gloria Lee
- Josh Stern



**Yu Ming Board of Directors: Compensation Committee**  
**2014-2015 School Year**  
*As of September 15, 2014*

**Goals**

- Update Principal performance rubric to reflect current best practices
- Establish semi-annual goals for principal
- Advise principal on compensation structure alternatives for teaching staff based on current best practices
- Conduct and complete annual performance review for Principal, incorporating input from all key stakeholder groups

**Meetings**

- September: Set Fall goals for principal
- October: Revise rubric for principal performance evaluation
- November: Review alternatives for teacher compensation structure
- December: Collect input about principal performance
- January: Conduct performance review for Jan-Dec 2014; set Jan-June goals for principal
- February: Discuss and develop recommendation for teacher compensation structure
- June: Set summer goals for principal