



## 2021-22 Annual Report

---

# Mission & Overview

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

## OVERVIEW

The 2021-22 school year was the sixth operational year for Wasatch Waldorf Charter School. It was also the third academic year in which we experienced significant effects from response to the Covid-19 pandemic. During the year while we no longer offered an “online only” program for students and families, we continued to work with a four day in-person school week and Fridays online. We maintained sanitation practices, some aspects of social distancing and changes in programming( such as limited singing and playing of flutes and recorders). We also experienced on-going absences for students and staff with Covid symptoms and confirmed Covid cases, including a need to still track Covid cases and respond with notifications and quarantines based on the guidelines established by the Health Department. We noted effects from these measures, as well as pressure around the increasingly polarized sentiments within the larger society and our community related to mask wearing. Relational tensions were felt throughout the school as we worked to address varied concerns and take responsible, measured approaches to complex challenges.

Despite these pressures and the toll that they took on faculty, students, and families, we also experienced some beautiful moments of settling and growth. We saw great progress in our lower grades reading program and exceptional student growth. Teachers continued with training, including launching our on-site APPEL licensure program and professional development courses in math and assessment. We gathered again, after two years of a break, at the end of the year for our Spring Gala. And, we experienced tremendous support and devotion from our community. Much of the successful navigation of such challenging years early in our school's biography is to be credited to devoted, capable, flexible, resilient faculty and staff.

*Emily Merchant*  
Executive Director

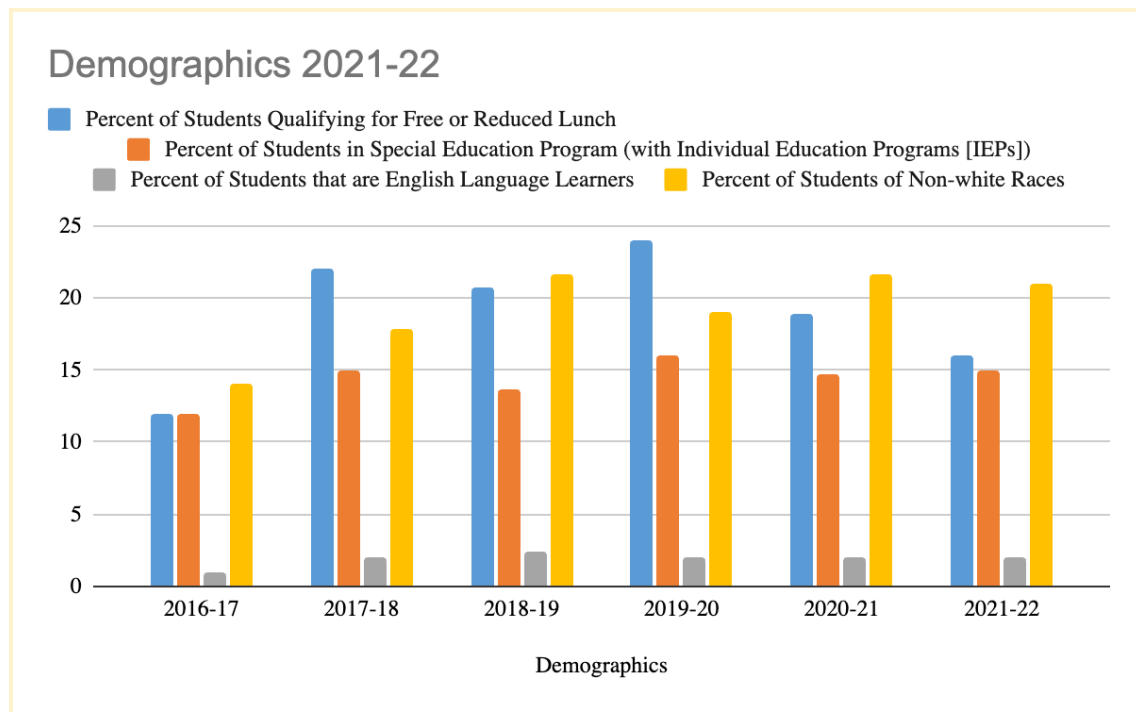
# 2021-22 Key Accomplishments

- ★ School remained steady with a 4 day in person, 1 day remote schedule, continued Covid response and shut-downs, and significant staff and student absences.
- ★ Graded as in “Good Standing” during our 5 year Comprehensive Review by State Charter School Board, including examinations of charter fidelity, academic achievement, Board governance, finance and on-going compliance.
- ★ Provided quality training to teachers, including on-site math workshops, LETRS reading training, and curative training.
- ★ Continued growth of innovative “Special Class” in special education, our “Lotus” class. Developed unique movement-based approach to working with students.
- ★ Very high student and staff retention.
- ★ Academic growth and progress was made across all grades as measured by internal assessment metrics, even with interrupted and remote learning.
- ★ Met all annual early learning goals.
- ★ Fundraising engagement and revenue generated increased, even with a new format to some events, including Harvest Festival, Sustainer Drive, and Spring Gala.
- ★ Governing Board leadership stabilized, Director and Board Evaluations were implemented, Policy Review was more timely.
- ★ Continued low number of disciplinary actions, including suspension for behavior that violated the school’s Code of Conduct.

# Our Community

## Demographics

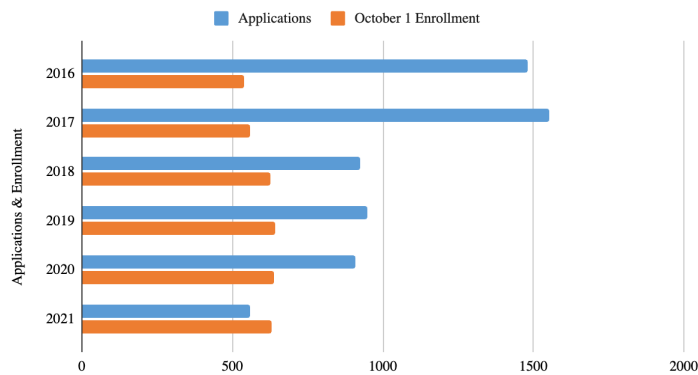
In our sixth year, all demographic measures remained relatively close to the previous years, as demonstrated below. The data on free and reduced lunch may be an under-representation as a large number of students were learning remotely (and hence without any reason to apply for lunch assistance) and since federal Covid-relief measures provided for free lunch for all students (also diminishing the need for families to apply for assistance). WCS does not have a mechanism for gathering this socioeconomic data from any other source.



## Enrollment

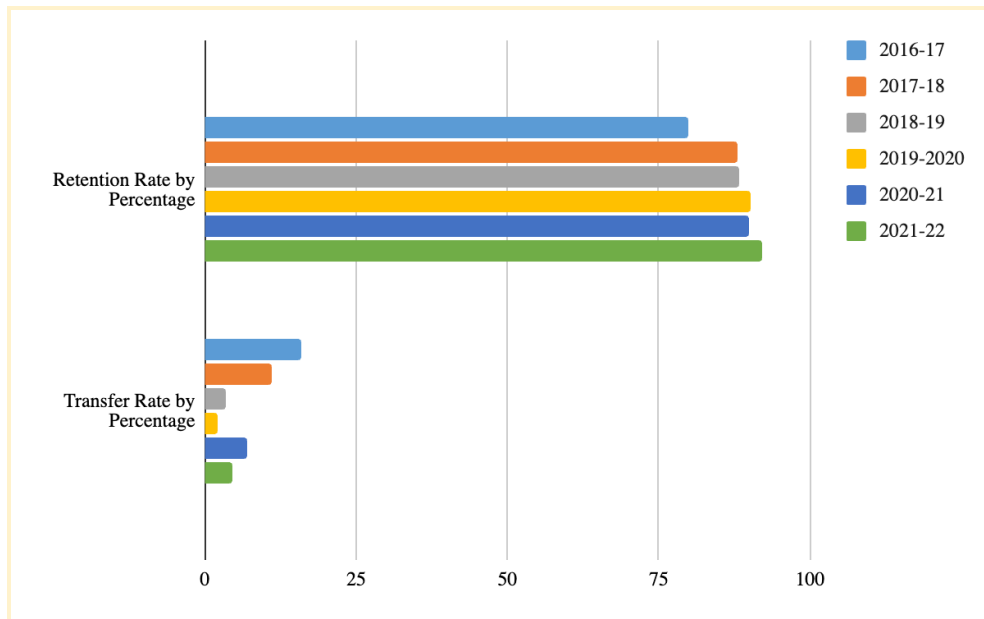
WCS maintained consistent interest in enrollment, once again fully enrolling to our maximum and maintaining sizable waiting lists throughout the year.

Applications and October 1 Enrollment



## Retention

WCS maintained year to year with a 98.7% enrollment trend. Our student retention was at 91.8% of our students returning for the 2021-22 school year. The within year transfer rate (the number of students who withdraw *during* the school year) was lower than the previous year, despite ongoing pandemic effects, at 4.6%. On all measures, WCS outperformed the State average for all charter schools and the State's target goals of 95% enrollment trend, 80% retention and less than 15% transfer rate.

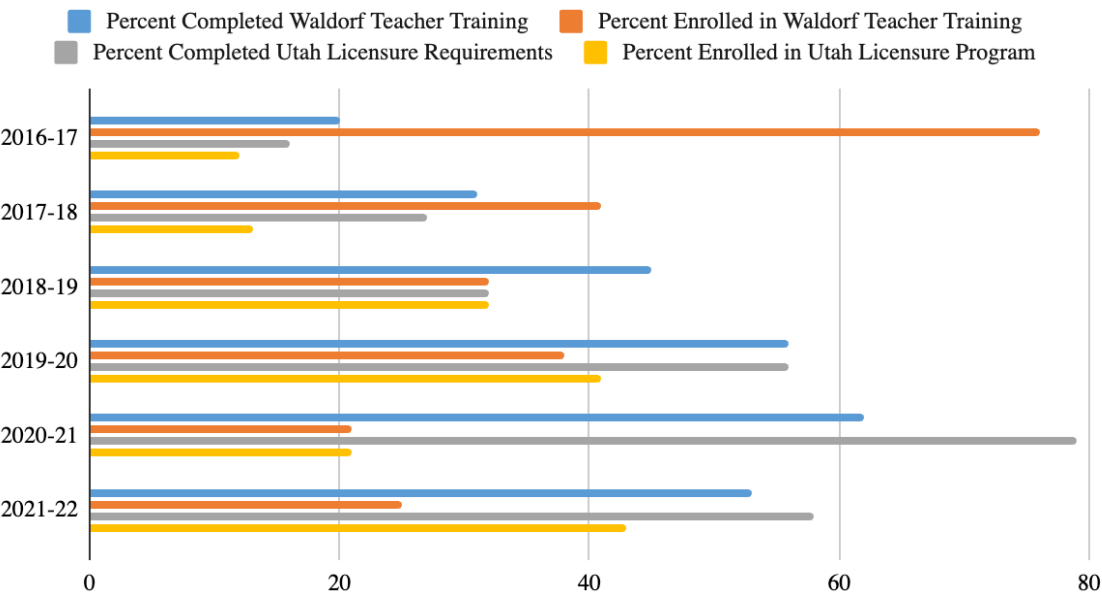


## Employee Qualifications & Training

Additional teachers completed Waldorf training in the summer prior to the 2021-22 school year, and many teachers began or continued training programs as well. A significant increase occurred in the number of teachers with Utah teaching licenses, as well as those involved in a

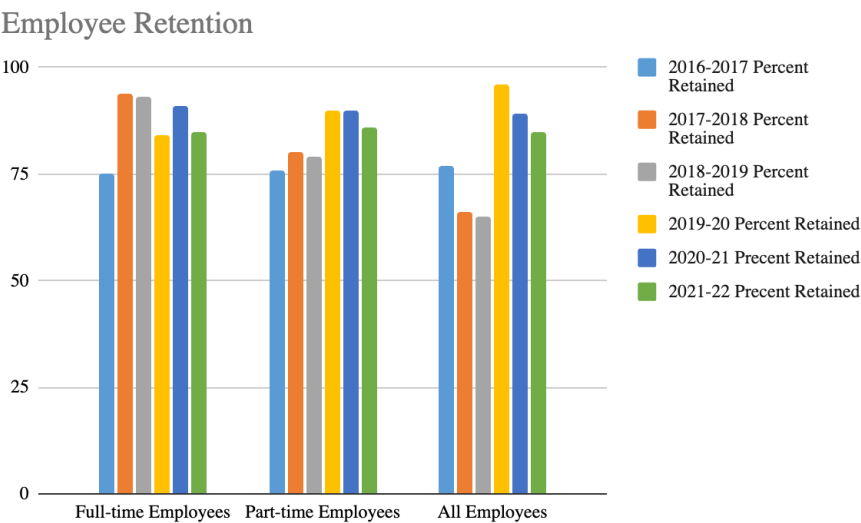
licensure training program. Overall, a far greater number of teachers have been with the school for multiple years and have completed State licensure and Waldorf training.

### Teacher Credentials



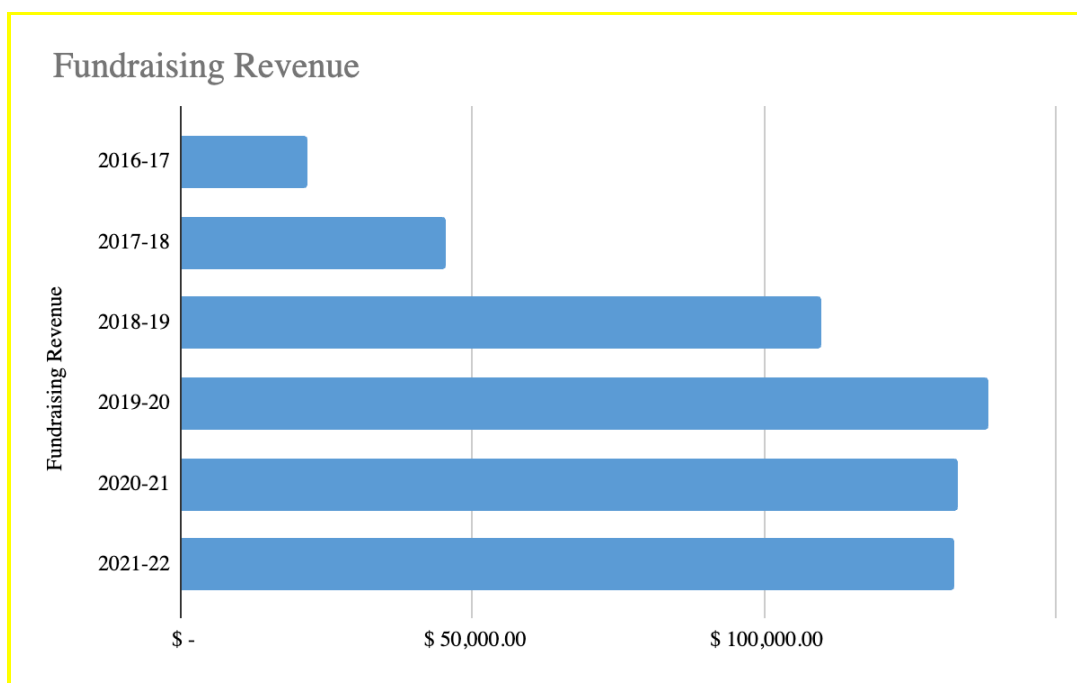
### Employee Retention

WCS had very strong employee and teacher retention again with an overall retention of all employees was the highest yet at 86%, with 85% of full-time Faculty and 87% of part-time staff returning from the previous school year. This is particularly noteworthy given the many pressures from the pandemic.



## *Fundraising*

WCS continued to have significant community investment in our programs and mission, with revenue from various fundraising activities holding steady, even during the pandemic. Our total funds raised was \$132,730 from all fundraising activities and donations, slightly below the previous year.



## *Family & Community Engagement*

Community engagement was a challenge again in the 2021-22 school year with ongoing implications from the Covid pandemic. Volunteers in the building, community events, field trips, and other activities were significantly curtailed. However, attendance at Family council meetings increased as they were held remotely in the evenings, and participation from parents was still significant. In addition, the participation at the school-wide events that were held exceeded previous years for both the Harvest Festival and Spring Gala.

# Key Elements

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

<b>Maintain a large enough student population to offer all programmatic elements listed in the approved application.</b>
--

Meets: Enrollment has remained steady, with consistent interest allowing WCS to continue to grow and develop all program elements intended. Wasatch enrolled 631 students as of the October 1 student count and maintained an Average Daily Membership of 617 students throughout the school year.
--

<b>Be based on a developmental approach to curriculum which uses Waldorf methods and partners with public or private Waldorf associations.</b>
--

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

<b>Teachers actively participate in a Waldorf teacher training within 2 years of employment and complete training within the expected timeframe for the selected program.</b>
---

Meets: As noted above, 53% of teachers and administrators have completed Waldorf training and another 25% were actively enrolled during the 2021-22 school year.
--

<b>Integrate the Utah Core Standards into the existing Waldorf curriculum to seamlessly teach competencies and material.</b>
--

Meets: Guides for teachers, professional development and alignment documents are all developed or in process to support the seamless integration of standards into the Waldorf
--



curriculum. This is a matter of on-going effort and development, as it relies, in part, on teacher experience and competencies.

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

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

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

Meets: Specialty classes have been able to build on curriculum in all areas. Class teachers and specialty teachers continue to collaborate more and more each year.

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

Meets: WCS provides narrative-based reports for parents on student progress and uses portfolio reviews to highlight student growth and learning in grades 6-8.

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

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

**Includes a Family Council that meets regularly, typically monthly during the school year, to coordinate efforts to involve families, build school culture, participate in committees, and provide advice to governing board regarding family and student needs.**

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

- Greater involvement of Parent Coordinators with Vice-chairs serving as liaisons with particular grades
- More reports from Committees and Working Groups
- Online meetings and in-person meetings with higher attendance
- New volunteer tracking system is in place and being utilized

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

Meets: WCS secured the lease to farm 11 acres of county land near to the school site. Additional gardening and farming opportunities have emerged through this collaboration, including a CSA. Work continues towards including items from the garden in the school lunch program. Gardening classes have included more cooking.

**Students receive regular foreign language instruction.**

Suspended. Optional online Spanish classes were offered for students; however, a shortened schedule in response to the pandemic resulted in the suspension of regular foreign language instruction.

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

Meets: Lower grades 1-3 have music classes. Students from grades 4-8 have strings twice a week. Singing and recorder playing in Main Lessons and choirs has been lessened due to the pandemic and only happened outdoors during the school day.

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

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

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

Meets: Many outdoor experiences occurred, including nature walks, hikes, time outdoors, gardening and camping trips. Continued work occurred on gardening program, recycling program, and farming, as well as supporting teachers in developing an understanding of how to teach outdoors.

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

Meets: The 3 Streams program is robust and includes an effective referral process for promptly addressing student needs and teacher and parent concerns. This included online meetings with students and lots of innovative supports during the pandemic. The Rti process is formalized with referral forms and format for Support Circle meetings with parents, 3 week follow-ups and SPED referral process. Progress monitoring is formalized and supported by the Assessment Coordinator.

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

Meets: Many activities are occurring regularly, such as parenting classes, Family Council Meetings, Back to School Night, Panel Discussion & Class Parent Nights. Some offerings have been lessened in the pandemic, such as Visiting Lecturers, and Festivals and Assemblies.

## *Charter Agreement Performance Measures*

### **Upper Grades Local Performance Measures**

These charter performance measures were reviewed with the State Charter School Board (SCSB) during the 5 Year Comprehensive review. Given the lack of annual assessment data from numerous years due to the Covid-19 pandemic, evidence was not clear on the trajectory towards meeting these goals. In consultation with SCSB, it was determined that new goals would be crafted using actual historical data and submitted for approval to the School's Governing Board and the SCSB by the end of the 2022-23 school year, once several years of data had been able to be collected and reviewed. This process is under-way, and the 2022-23 Annual Report will include an analysis of local growth based on these goals for students in upper grades.

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

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

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

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

2019-2020: No data available for school year; State end-of-year assessments did not occur due to Covid pandemic and closure of in-person schooling.

2020-2021: **100%** of students in third grade that were proficient at the beginning of the year

remained proficient at the end of the year.
2021-2022: <b>100%</b> of students in third grade that were proficient at the beginning of the year remained proficient at the end of the year.
<b>Percentage of students in grade 3 not reading on grade level at the beginning of the year who are reading on grade level at the end of the year: 40%.</b>
<p>2016-17: <b>10%</b> of students who were not proficient at the beginning of the year reached proficiency by the end of the year.</p> <p>WCS met its UNIFORM GROWTH GOAL as set and calculated by the Utah State Board of Education.</p>
<p>2017-18: <b>6%</b> of students who were not proficient at the beginning of the year reached proficiency by the end of the year.</p> <p>WCS again met its UNIFORM GROWTH GOAL as set and calculated by the Utah State Board of Education.</p>
<p>2018-19: <b>29%</b> of students who were not proficient at the beginning of the year reached proficiency by the end of the year.</p> <p>In 2018-19, the State's cut score for the UNIFORM GROWTH GOAL increased from 48% to 60% and shifted to include not only 3rd Grade students, but all of 1st-3rd. WCS scored 59% and just missed the newly increased standard as set and calculated by the Utah State Board of Education.</p>
2019-2020: No data available for school year; State end-of-year assessments did not occur due to Covid pandemic and closure of in-person schooling.
<p>2020-2021: <b>29%</b> of students who were not proficient at the beginning of the year reached proficiency by the end of the year.</p> <p>WCS again met its UNIFORM GROWTH GOAL as set by the State (Goal: 60% of Grades 1-3 make typical or better progress). WCS had 74% of our students make typical or better progress. 9% higher than the State's average.</p>
<p>2021-2022: <b>26%</b> of students who were not proficient at the beginning of the year reached proficiency by the end of the year.</p> <p>WCS again met its UNIFORM GROWTH GOAL as set by the State (Goal: 60% of Grades 1-3 make typical or better progress). WCS had 67% of our students make typical or better progress.</p>

<b>Percentage of students in grades 1 – 8 missing <math>\geq 10\%</math> of school days: 14% or less.</b>
2016-17: 15% of students missed over 10% of the school year.
2017-18: 22% of students missed over 10% of the school year.
2018-19: 12% of students missed over 10% of the school year.
2019-20: 6.4% of students missed over 10% of the school year.
2020-21: 6.79% of students missed over 10% of the school year. However, numbers were hard to track based on Covid pandemic and extensive quarantines / remote learning.
2021-22: 26.3% of students missed over 10% of the school year. These numbers reflect significant absences due to the Covid pandemic and extensive quarantines without a remote learning option for the year.

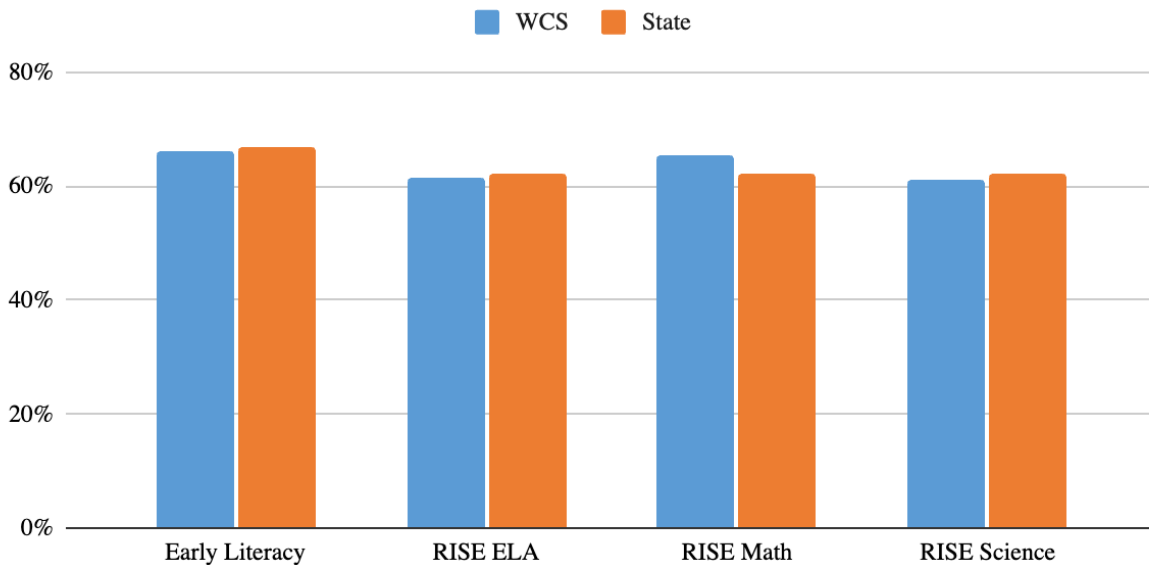
# Student Achievement Scores

## *Growth*

Overall, students were assessed using three tools: Accadience (a state-required indicator of early reading and math used in grades 1-3 and administered three times a year), NWEA (a benchmark assessment used internally for students to track progress in ELA and Math administered 3 times a year), and RISE (a state-required summative assessment used in grades 3-8 and administered only at the end of the year).

At WCS, we focus on student growth overtime, recognizing that all students learn and progress at their own, individual paces. Consequently, we find the most critical piece of state data to be our growth percentiles, or the number of students who increased their level of proficiency from one year to the next. In this measurement, the State's School Report Card scored WCS as "Exemplary." In particular, in nearly every area, we were at or above the State's average from growth. Of particular note, for our students who had been in the lowest 25th percentile of lower, 62% of them also made growth.

## WCS Growth versus State Average Growth



Percent of Students Making Growth Over Previous Year's Proficiency Compared to State Averages

### READING LOWER GRADES

Overall, reading scores for students in grades 1-3 have increased over the course of the years that the school has been operating, as shown on the charts below. For the 2021-22 School Year, 48% of all students in grades 1-3 were considered at or above benchmark in reading and 67% of these students made “typical or better progress.”

As we expect within our Waldorf model, these numbers look lower because our first graders have a slower start to reading. However, we consider to see significant growth overtime and have consistently increased third grade proficiency to exceed that of the State overall. Below is a summary of state and local literacy goals for the 2021-22 school year.

#### State Goal

The State Growth Goal requires 60% of first through third grade students to make typical, above typical, or well above typical growth from beginning of year to the end of year as measured by Pathways of Progress on the Acadience Reading assessment. **WE MET with 67% OF 1ST-3RD GRADE WHO MADE TYPICAL/BETTER GROWTH.**

#### Local Goals

By the end of the 2021-22 school year, we will increase our percentage of 3rd graders scoring at or above benchmark on the Acadience Reading Composite Score by 11%. **WE HAD 9% OF 3RD GRADERS WHO SCORED BELOW AT THE BEGINNING OF THE YEAR AT/ABOVE BENCHMARK AT THE END.** Historically, it is the most students at benchmark by end of 3rd grade that we have ever had. 76% of students were at/above benchmark, this is a 16% historical increase in overall proficiency.

By the end of the 2021-22 school year, Wasatch Charter School, will increase the percentage of 2nd graders scoring at/above benchmark on oral reading fluency accuracy submeasure from BOY to EOY by 11%. **WE MET with 16% OF 2ND GRADERS INCREASING ACCURACY.** In addition, 90% of 2nd graders made typical/better progress.

<i>Accadience Reading Proficiency by Grade</i>					
	2016-17	2017-18	2018-19	2020-21	2021-22
1st	39	11	14	28	18
2nd	50	32	29	53	54
3rd	63	59	65	61	76

<i>Accadience Reading Proficiency Growth by Grade 2021-2022</i>			
	Beginning of Year	End of Year	
1st	12	18	
2nd	42	54	
3rd	67	76	

<i>Accadience Reading Proficiency by Cohort over Time</i>					
	2017	2018	2019	2021	2022
1st - 3rd	39	32	65		
2nd - 3rd	50	59			
1st - 2nd		11	29		
1st - 3rd			14	60.7	
2nd - 3rd				53	76
1st - 2nd				28	54



### *Disaggregated Proficiency on Accadience Reading*

WCS Percent Proficient on Accadience Reading	<b>48%</b>
State Percent Proficient on Accadience Reading	<b>45%</b>
Male Students Proficient on Acadience Reading	<b>49%</b>
Female Students Proficient on Acadience Reading	<b>46%</b>
Caucasian Students Proficient on Acadience Reading	<b>43%</b>
Other Racial Groups Proficient on Acadience Reading	<b>70%</b>
Students with Disabilities Proficient on Acadience Reading	<b>27%</b>
Economically Disadvantaged Students Proficient on Acadience Reading	<b>33%</b>

## MATH LOWER GRADES

In mathematics in the lower grades, 27% of 1st - 3rd grade students scored proficient at the end of the year, and 36% made typical or better progress. Accadience math was a new measure as of the 2021-22 school year, so there are not comparisons available over time or by cohort as there are with reading.

<i>Accadience Math Proficiency Growth by Grade 2021-2022</i>			
	BOY	EOY	
1st	19	10	
2nd	33	30	
3rd	44	45	

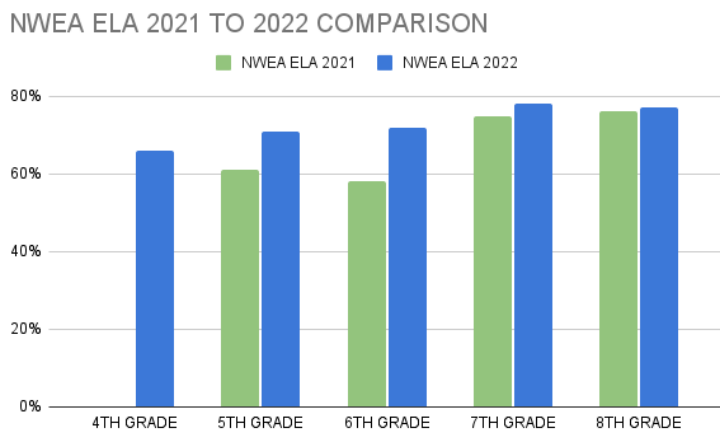
### *Disaggregated Proficiency on Accadience Math*

WCS Percent Proficient on Accadience Math	<b>27%</b>
State Percent Proficient on Accadience Math	<b>N/A</b>
Male Students Proficient on Acadience Math	<b>N/A</b>
Female Students Proficient on Acadience Math	<b>N/A</b>
Caucasian Students Proficient on Acadience Math	<b>N/A</b>
Other Racial Groups Proficient on Acadience Math	<b>N/A</b>
Students with Disabilities Proficient on Acadience Math	<b>N/A</b>
Economically Disadvantaged Students Proficient on Acadience Math	<b>N/A</b>

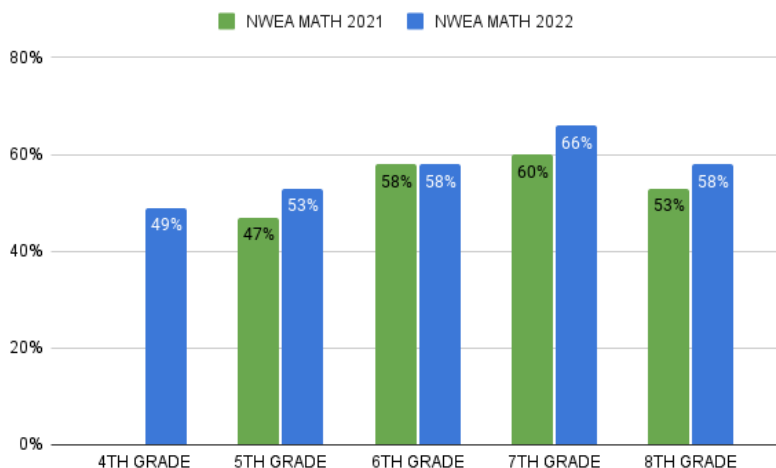
## UPPER GRADES

In the upper grades, every grade showed increased proficiency in English Language Arts (ELA) and Mathematics from the end of the 2020-21 school year to the end of the 2021-22 school year. Some grades showed dramatic increases (note a statistically significant and achievable increase in proficiency is typically supposed to be 2-3%). Many grade cohorts showed even greater than typical increases on NWEA when measuring proficiency in ELA and math. These proficiency rates are captured in the charts below.

### NWEA ELA COMPARISON 2021 TO 2022 BY COHORT



### NWEA MATH COMPARISON 2021 TO 2022 BY COHORT



On the State required RISE assessments, 37% of students in 3rd - 8th were proficient on RISE ELA, 24% in math, and 33% in science,

In order to contextualize the data, it is also helpful to look at the progress of cohorts of students over time on RISE. It is also important to note that we are missing the 2020 data, as assessments were not administered and that the 2021 data was less complete due to lower participation of online students and a year of very disrupted learning.

### *Disaggregated Proficiency on RISE*

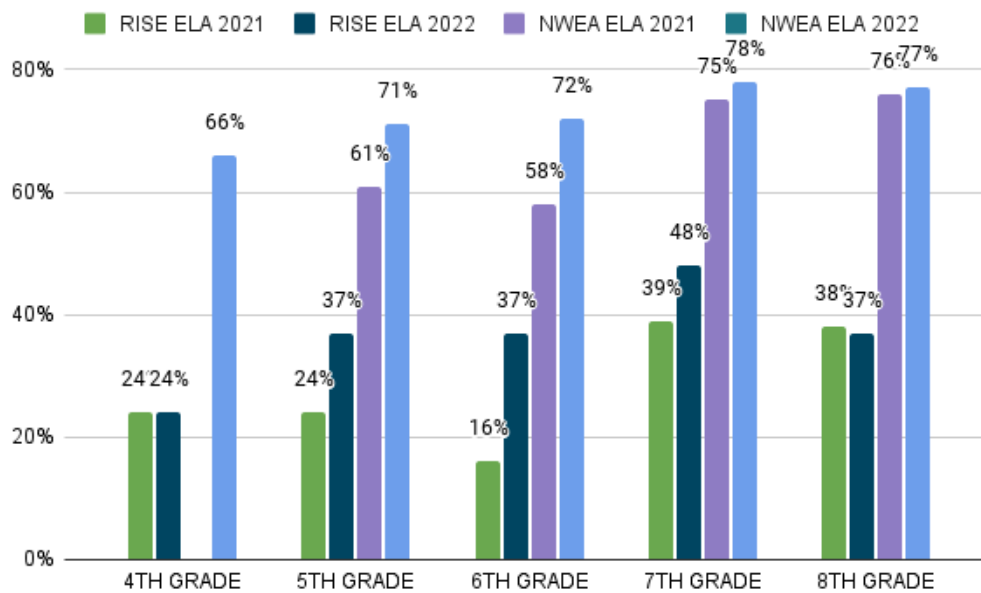
WCS Percent Proficient on RISE	ELA 37% Math 24% Science 33%
State Percent Proficient on RISE	ELA 45% Math 44% Science 48%
Male Students Proficient on RISE	ELA 33% Math 27% Science 34%
Female Students Proficient on RISE	ELA 41% Math 23% Science 33%
Caucasian Students Proficient on RISE	ELA 38% Math 26% Science 33%
Other Racial Groups Proficient on RISE	ELA 30% Math 20% Science 33%
Students with Disabilities Proficient on RISE	ELA 12% Math 10% Science 10%
Economically Disadvantaged Students Proficient on RISE	ELA 34% Math 24% Science 33%

<i>SAGE / RISE ELA Proficiency by Grade</i>						
	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
3rd	20	28	18	N/A	24	44
4th	17	23	39	N/A	24	23
5th	35	16	33	N/A	16	30
6th	40	32	42	N/A	40	37
7th	40	32	37	N/A	38	48
8th	60	48	41	N/A	27	36
School-wide			34	N/A	33	37

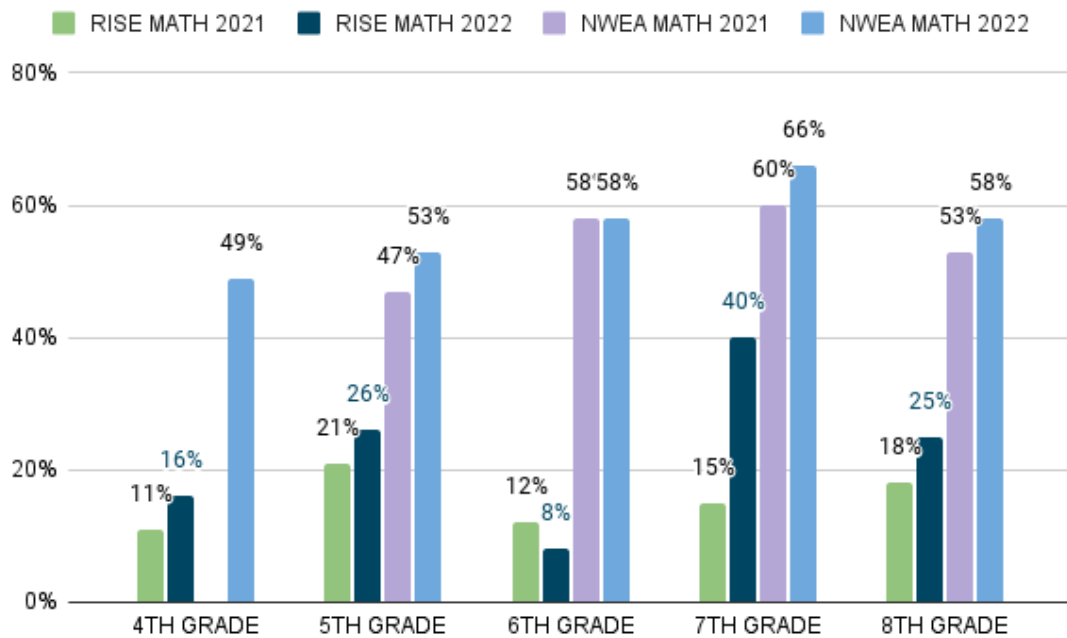
<i>SAGE / RISE Math Proficiency by Grade</i>						
	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
3rd	8	10	14	N/A	10	32
4th	17	25	10	N/A	22	16
5th	33	33	9	N/A	12	26
6th	0	11	24	N/A	15	8
7th	40	27	32	N/A	18	40
8th	19	57	10	N/A	29	24
School-wide			15	N/A	17	24

<i>SAGE / RISE Science Proficiency by Grade</i>						
	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
4th	N/A	6	6	N/A	N/A	26
5th	14	22	10	N/A	N/A	19
6th	39	32	27	N/A	32	38
7th	15	18	23	N/A	18	41
8th	15	60	23	N/A	14	37
School-wide			16	N/A	36	33

### *RISE 2021 TO RISE 2022 & NWEA ELA 2021 to 2022 by COHORT*



### *RISE MATH 2021 TO RISE 2022 & NWEA MATH 2021 to 2022 by COHORT*



<i>SAGE / RISE ELA by Cohort</i>					
	2017	2018	2019	2021	2022
PK-3rd					44
PK-4th				24	23
K-5th				24	30
1st-6th			18	16	37
2nd-7th		28	39	40	48
3rd-8th	20	23	33	38	36
4th-8th	17	16	42	27	
5th-7th	35	32	37		
6th-8th	40	27	41		
7th-8th	40	48			
<i>SAGE Math by Cohort</i>					
	2017	2018	2019	2021	2022
PK-3rd					32
PK-4th				11	16
K-5th				22	26

1st-6th			14	12	8
2nd-7th		10	10	15	40
3rd-8th	8	25	9	18	24
4th-8th	17	33	24	29	
5th-7th	33	11	32		
6th-8th	0	27	10		
7th-8th	40	57			

### *SAGE SCIENCE by COHORT*

	2017	2018	2019	2021	2022
PK-4th					26
K-5th					19
1st-6th					38
2nd-7th			6	32	41
3rd-8th		6	10	18	37
4th-8th	14	22	27	14	
5th-7th	39	32	23		
6th-8th	15	18	23		
7th-8th	15	60			

## Our Operations

### *Governance*

Governance of the school is overseen by a 5-11 member Board of Directors and their appointee, the Executive Director. Over the course of the 2021-22 school year, the Board of Directors has increased in professionalism, received helpful training, and reviewed policies, as well as maintaining ongoing responsibilities for oversight of budgets, operations, and fundraising. The Board continued to refine a formal Executive Director Evaluation and Board Self-Evaluation process as well as improving Board handbooks, agreements, and on-boarding processes.

Key required functions that have been complied with include:

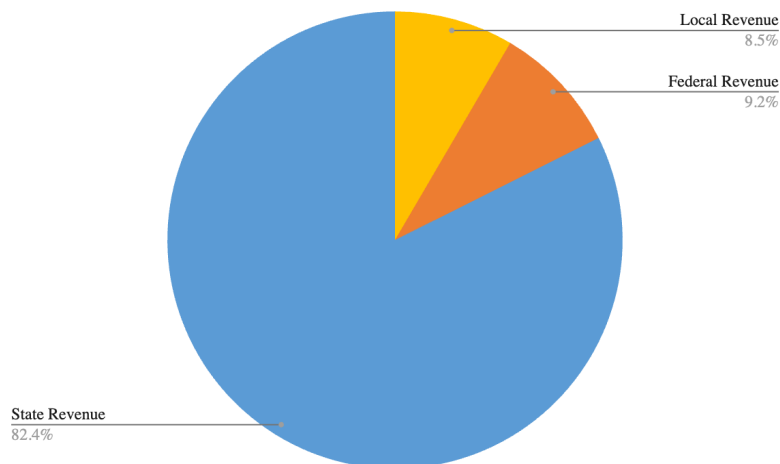
- ❖ The Governing Board has instituted policies and programs to ensure compliance with the terms and conditions of the Charter Agreement as well as compliance with all governing laws, regulations, and rules.
- ❖ The Governing Board has a website with the content requirements found in R277-482, Utah Administrative Code, posted at least 180 days prior to the opening day of school. In addition, the SCSB requires the website contain links to school data and accountability reports maintained on other websites (e.g., student assessment, audited financial statement, etc.); links to Governing

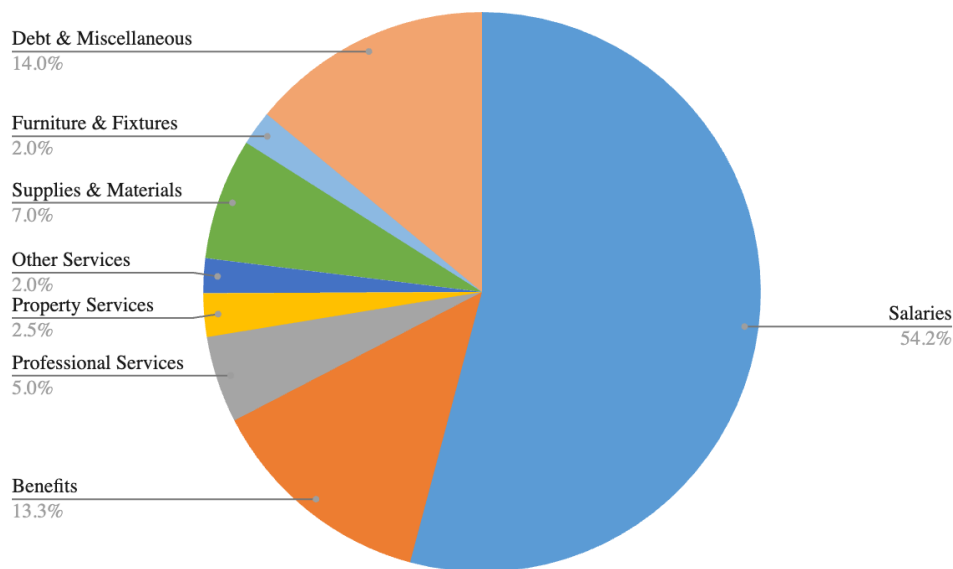


Board meeting dates, agendas and minutes; and reports created by the Governing Board to provide evidence of how the Charter School performed compared to the assurances and school accountability measures in this Charter Agreement.

- ❖ The Charter School's Governing Board has submitted such reports as required by state and federal law, this Charter Agreement, and as may be requested by the SCSB.
- ❖ WCS protects the rights of students with disabilities.
- ❖ WCS has all full-time class teachers with a current license or temporary authorization to provide that they are State Qualified. Details on qualifications are above.
- ❖ WCS complies with Governance Requirements and the developing Governing board policies, including those related to oversight of an Education Service Provider, if applicable and governing board by-laws, Utah Open & Public Meetings Act, Governing board code of ethics, Governing board conflicts of interest, and Governing board composition and/or membership rules (e.g., requisite number of qualified teachers, restriction on employees or contractors serving on the board, etc.).

## Finances





WCS is carefully managing state, federal, and local funds to meet all priorities and needs. State funding comprises 82% of all revenue to the school, with Federal funds providing 9% and local revenue and fundraising making up about 8%. Federal funding was higher than typical in the 2021-22 school year due to additional Covid relief funds being allocated. The vast majority of funding is used to pay salaries and benefits, comprising 67% of all costs. Building expenses (including maintenance, grounds care, and other costs) comprised 17% of expenses, with the lease alone making up 14% of total budget. Professional services comprise 5% of the total budget, including professional development costs and special education service providers.

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

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

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

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

<b>Number of Material of Significant Audit Findings, Current Year</b>
<p>2016-17: No findings on enrollment audit.</p> <p>Two findings on financial audit which have been addressed and formal response is being sent to USBE by May 30.</p> <ol style="list-style-type: none"> <li>1. Need to increase coverage on Treasurer's Bond</li> <li>2. Need to formally appoint Records Officer (Ms. Merchant and Ms. Salisbury had been identified and attended training, but training was in December 2015 and there had not been a formal Board vote. That has been remedied for the coming year.)</li> </ol>
2017-18: No material findings.
2018-19: One finding related to additional spending from a project fund part of bond that was not listed in the original budget as "revenue."
2019-20: No material findings.
2020-21: No material findings.
2021-22: No material findings.

<b>Number of Unresolved Audit Findings from Prior Year</b>
2016-17: N/A
2017-18: See Above. All findings have been addressed.
2018-19: N/A
2019-20: N/A
2020-21: N/A
2021-22: N/A

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

2018-19: Covenants were maintained.
2019-20: Covenants were maintained.
2020-21: Covenants were maintained.
2021-22: Covenants were maintained.

<b>Adherence to Operational Budget: Within 5%</b>
2016-17: Current projections are for less than 1% deviation from budget projections. Final budget will be accurate.
2017-18: Yes.
2018-19: No.
2019-20: Yes.
2020-21: Yes.
2021-22: Yes.

<b>Occupancy Costs: 28% or less</b>
2016-17: 17.5%
2017-18: 17.5%
2018-19: 19%
2019-20: 19%
2020-21: 19%
2021-22: 17%

<b>Debt service coverage ratio: 1.1</b>
2016-17: 1.39
2017-18: 1.31
2018-19: 1.24

2019-20: 1.32
2020-21: 1.25
2021-22: 1.5

<b>Cashflow: Positive</b>
2016-17: Meets. Cash flow has remained positive all year.
2017-18: Meets.
2018-19: Meets.
2019-20: Meets.
2020-21: Meets.
2021-22: Meets.

<b>Total Margin of Net Income to Revenue (for 3 years aggregated): Positive</b>
2016-17: 5.3%
2017-18: 4.2%
2018-19: 3.8%
2019-20: 4.7%
2020-21: 3.58%
2021-22: 6.9%

<b>Enrollment Variance (October 1 count compared to projections): 95%</b>
2016-17: 100%. October 1 enrollment was 540 (as verified on audit). Projections for 2016-17 were 540.
2017-18: October 1 count was 558. Budget was 540.
2018-19: October 1 count was 628. Budget was 634.
2019-20: October 1 count was 640. Budget was 640.

2020-21: October 1 count was 641. Budget was 640.
2021-22: October 1 count was 631. Budget was 640.

<b>Unrestricted Cash on Hand: 30 days with a positive trend.</b>
2016-17: 48 days cash on hand.
2017-18: 44 days cash on hand.
2018-19: 61 days cash on hand.
2019-20: 42 days cash on hand.
2020-21: 67 days cash on hand.
2021-22: 73 days cash on hand.

<b>Ratio of Assets to Liabilities: 1.0 with positive trend</b>
2016-17: 2
2017-18: 1.0
2018-19: 1.01
2019-20: 1.04
2020-21: 1.02
2021-22: 1.05

<b>Debt to asset ratio: less than or equal to .9</b>
2016-17: Meets -- more assets (cash and property) than debt
2017-18: Meets
2018-19: Meets
2019-20: Meets
2020-21: Meets

2021-22: Meets
----------------

# Our Plans for Success

## *Framework for Success*

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

This document includes:

- An Overview of the Paradigm and Definition of “Success” at WCS
- Strategic Priorities for the 2020-21 School Year
- A Long-term Vision / Strategic Plan
- Required State & Federal Plans

This document is available on the school's website at:  
<https://www.wasatchwaldorf.org/governance#compliance>