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Placer County Office of Education

Regarding

Newcastle Charter School

June 30, 2006

FISCAL CRISIS
& MANAGEMENT ASSISTANCE TEAM



Administrative Agent

**Larry E. Reider
Kern County
Superintendent of Schools**

Chief Executive Officer

Joel D. Montero

FCMAT

FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM



Administrative Agent
Larry E. Reider
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Superintendent of Schools

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Petaluma, CA 94952
Telephone.....707-775-2850
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June 30, 2006

Alfred D. (Bud) Nobili, Superintendent
Placer County Office of Education
360 Nevada Street
Auburn, CA

Dear Superintendent Nobili,

In April 2006, the Fiscal Crisis and Management Assistance Team entered into an agreement with the Placer County Office of Education for a review of Newcastle Charter School. Specifically, the scope and objectives of the study asked FCMAT to:

1. Verify that charter school student enrollment and application forms were filled out completely, signed, and dated by parents prior to the first day of student attendance.
2. Verify that approved inter district agreements are on file for non-resident students.
3. Verify that apportionment received for 2005-06 was earned in compliance with student enrollment and attendance requirements and certified reports.
4. Verify if regular district students and charter students are commingled in Newcastle Elementary School District classrooms.
5. Verify if the provisions of the Newcastle Charter School Petition “Application and Enrollment Process” and the “Timeline Application for the Initial School Year” were followed in the startup of the charter school in 2005-06.
6. Verify if any questionable practices in the past or at the present time are taking place that could be considered fraudulent.
7. Quantify the potential revenue loss relative to ADA that may be disallowed for reasons referenced in scope points #1, #2, and #3.

The attached final report contains the study team’s findings and recommendations. We appreciate the opportunity to serve you and we extend our thanks to all the staff of the Placer County Office of Education, Newcastle Elementary School District and Newcastle Charter School.

Sincerely

Joel D. Montero
Chief Executive Officer

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Foreword

FCMAT Background

The Fiscal Crisis and Management Assistance Team (FCMAT) was created by legislation in accordance with Assembly Bill 1200 in 1992 as a service to assist local educational agencies in complying with fiscal accountability standards.

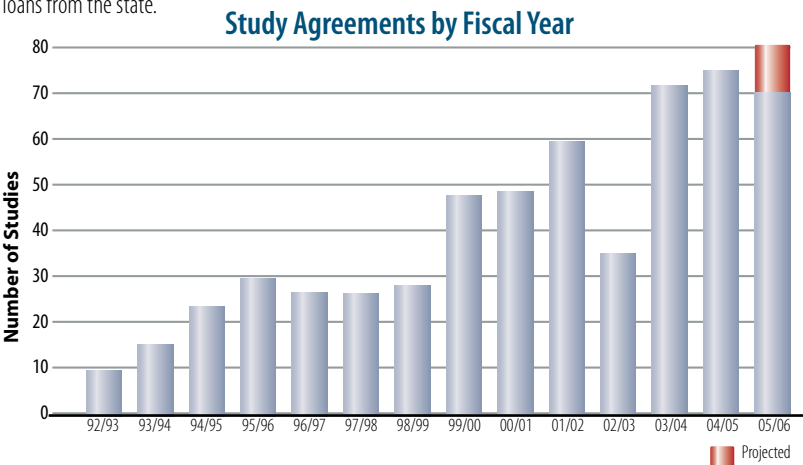
AB 1200 was established from a need to ensure that local educational agencies throughout California were adequately prepared to meet and sustain their financial obligations. AB 1200 is also a statewide plan for county offices of education and school districts to work together on a local level to improve fiscal procedures and accountability standards. The legislation expanded the role of the county office in monitoring school districts under certain fiscal constraints to ensure these districts could meet their financial commitments on a multiyear basis. AB 2756 provides specific responsibilities to FCMAT with regard to districts that have received emergency state loans. These include comprehensive assessments in five major operational areas and periodic reports that identify the district’s progress on the improvement plans

Since 1992, FCMAT has been engaged to perform more than 500 reviews for local educational agencies, including school districts and county offices of education. Services range from fiscal crisis intervention to management review and assistance. FCMAT also provides professional development training. The Kern County Superintendent of Schools is the administrative agent for FCMAT. The agency is guided under the leadership of Joel D. Montero, Chief Executive Officer, with funding derived through appropriations in the state budget and a modest fee schedule for charges to requesting agencies.

Total Number of Studies 572
Total Number of Districts in CA..... 982

Management Assistance.....	539	(94.23%)
Fiscal Crisis/Emergency	33	(5.77%)

Note: Some districts had multiple studies.
Districts (7) that have received emergency loans from the state.
(Rev. 6/6/06)



Introduction

Background

Newcastle Elementary School is a single-school district serving grades K-8 in the town of Newcastle in Placer County. Newcastle Elementary School district serves most of the residents of the town of Newcastle; however, some Newcastle residents reside within the boundaries of other districts, including Auburn Union Elementary District and Western Placer Unified School District. Many of these residents would prefer that their children remain in their “community” school, even though that is not their actual district of residence. In the past, parents requested and received inter-district attendance agreements from their district of residence to allow their children to attend Newcastle Elementary School. However, several districts in Placer County have begun to experience declining enrollment and are less willing to grant inter-district attendance agreements.

In response to this situation, Newcastle Elementary School District explored, approved and opened a charter school within their elementary school. Public meetings were held in March, April, and May 2005. In addition, information was provided to the staff almost weekly from March through the end of the 2004-05 school year, keeping them updated on the process and answering questions about charter schools. Newcastle Charter School began operations in August 2005. The district’s governing board is also the charter school’s governing board.

In March, 2006, the Placer County Office of Education received a letter signed “Concerned Staff, Newcastle School” which alleged that certain charter documents were backdated and not correctly prepared. A copy of this letter is included in Appendix A. In response to the letter and because of concerns regarding the enrollment and attendance processes at Newcastle Elementary School District, the Placer County Office of Education contacted FCMAT to request an independent assessment of the charter school’s enrollment procedures.

Study Guidelines

The FCMAT study team visited the Newcastle Elementary School District and the Newcastle Charter School during the week of April 11, 2006 to conduct interviews, collect data and review documentation. This report is the result of those activities and is divided into the following sections:

- I. Charter School Guidelines
- II. Findings and Recommendations

Study Team

The FCMAT study team was composed of the following members:

Michele Dodge, CPA
FCMAT Consultant
Plymouth, CA

John Lotze
Public Information Specialist
FCMAT
Bakersfield, CA

Barbara Dean
Deputy Administrative Officer
FCMAT
Bakersfield, CA

Executive Summary

Newcastle Elementary School District opened a charter school on the Newcastle Elementary School campus in August 2005 in response to local parents who reside in other school districts but wish to send their children to a local community school. In the past, these parents requested and received inter-district transfers from their district of residence; however, recent declining enrollment has made several districts less willing to grant transfers.

Charter school and regular school students are commingled in classes at Newcastle Elementary School, and receive the same instruction. Education Code sections 47601 and 47602 establish criteria for charter schools, including an intent that they operate independently and that sites which share educational programs and serve similar pupil populations not be counted as separate schools. The practice of commingling of students by Newcastle Charter School appears to violate the legislative intent behind the Charter Schools Act of 1992.

FCMAT is not a policy-making agency and does not have legal authority. The issue of commingling in the Newcastle Charter School requires a policy statement or an interpretation of current law by the California Department of Education.

FCMAT found that many parents had not signed a charter school application form until March 2006, even though most students had been enrolled and attending the school since August 2005.

Most students residing outside the district who were enrolled in Newcastle Elementary School via inter-district attendance agreements prior to the charter school were automatically enrolled in the charter school; however, parents of new students were asked to complete a charter school enrollment application form prior to their children being enrolled in the charter school. All students enrolled in the charter school should complete a charter school enrollment application annually. Without a completed charter school enrollment form, a student's ADA cannot be claimed by the charter school.

A number of charter school applications and other student records were misfiled and difficult to locate. The charter school should implement a consistent filing policy and system and ensure that all charter school parents complete an enrollment application each year.

Because teachers cannot be required to teach in a charter school, the charter school should determine which teachers voluntarily teach charter students, and document this each year.

The charter school should review the California Department of Education's (CDE's) determination on the validity of commingling charter and non-charter students when it is received. If the CDE determines that the commingling is not valid, all non-resident charter student attendance not supported by an inter-district attendance agreement would be disallowed. This would affect 20 additional students, whose ADA has not been quantified.

Charter School Guidelines

Charter school laws allow all students within a county and in contiguous counties to attend the charter school without the permission of their district of residence. As a result, parents can continue to enroll their students at Newcastle Elementary School by enrolling in the charter school, thus avoiding the inter-district agreement process. Approximately one third of the district's students are enrolled in the charter school.

The Superintendent confirmed that the charter school's primary mission was to allow nonresident parents to continue to enroll their students in the Newcastle Elementary School District, even if the family's district of residence denied inter-district enrollment agreements. The charter school was intended to promote family choice by allowing non-resident students to continue to attend the Newcastle school. In all other ways, the charter school operates exactly the same as Newcastle Elementary School and was dubbed a "school within a school." Students are commingled in the same classes as the non-charter students; instructional programs, curriculum and staffing are identical.

An issue at the heart of the county office's request for a FCMAT study of the Newcastle Charter School is the commingling of charter and non-charter students within classes taught by the same teacher. Education Code section 47601 identifies the legislative intent for "teachers, parents, pupils, and community members to establish and maintain schools that operate independently from the existing school district structure." Included in Education Code section 47602 (a) (1) is the stipulation that sites that share educational programs and serve similar pupil populations may not be counted as separate schools. The limits contained in this paragraph may not be waived.

The California Department of Education (CDE) has been asked to provide a policy statement or interpretation of current law regarding this specific practice in relation to the legislative intent of charter school regulations. There is no question that commingling occurs at Newcastle Elementary School. Staff confirmed that classes include both charter and non-charter students, and all students are treated equally. FCMAT interviewed a sampling of certificated staff, all of whom stated that they had no opposition to teaching charter and non-charter students in a single classroom as long as they can remain employees of the district without loss of benefits or seniority.

The CDE has a comprehensive Web site which addresses many charter school issues. Some of the relevant questions and answers found on that Web site are included in this section.

What is the purpose of a charter school?

The Legislature expressed its intent that charter schools are a method to accomplish the following: (1) improve pupil learning; (2) increase learning opportunities for all pupils, with special emphasis on expanded learning experiences for pupils identified as academically low achieving; (3) encourage the use of different and innovative teaching methods;

(4) create new professional opportunities for teachers, including the opportunity to be responsible for the learning program at the school site; (5) provide parents and students with expanded educational opportunities within the public school system without the constraints of traditional rules and structure; (6) provide schools a way to shift from a rule-based to a performance-based system of accountability; and (7) provide competition within the public school system to stimulate improvements in all public schools.

E.C. section 47601

What are the restrictions on the establishment of a charter school?

There are some restrictions on the establishment of a charter school. With a few exceptions, a new charter school may only be located in the district that approves it. The law expressly prohibits the conversion of private schools to public charter schools. A charter school must be nonsectarian in its programs, admission policies, employment practices, and all other operations. A charter school may not discriminate against any pupil and may not charge tuition. In addition, the school's charter must include a description of the school's means for achieving a racial and ethnic balance among its pupils that is reflective of the general population residing in the district. Pupils may not be required to attend a charter school, nor may teachers be compelled to teach there.

E.C. sections. 47602(b), 47605(a), (b), (d), (e), and (f).

Does a charter school have a school board? Could it be governed by an existing school board? Could it operate as a nonprofit organization?

One of the 16 required elements of a charter school petition is an identification of the school's governance structure and a description of the process to be followed to ensure parental involvement. School governance can be structured in a variety of ways, but it usually involves the school's stakeholders (parents, teachers, administrators, classified staff, and community leaders) in some form or another. An existing school district's board of trustees may govern a charter school; however, when this is the case the charter school usually forms an advisory body made up of charter school stakeholders to advise the school district's governing board on issues such as program implementation, budgets and facilities.

If a charter school elects to operate as a nonprofit public benefit corporation, the entity granting the charter is entitled to a representative on the corporation's board of directors. However, the Legislature has stated its intent that the authorizer would not be liable for any of the debts or obligations of the charter school. Nonprofit corporations are governed by a body of law in the California *Corporations Code*. A charter school that is operated by or as a nonprofit would be required to meet the conditions of the laws governing nonprofit corporations in addition to complying with all charter school laws.

E.C. sections 47604 and 47605(b)(5)(D)

What are the geographic restrictions on charter school operations?

With a few exceptions, Education Code (E.C.) Section 478605(a) allows a new charter school to operate only within the geographic jurisdiction of the school district that authorized it. The law also requires a charter petition to identify each site where the school will operate. A charter school may operate only one site outside of the district of authorization but within the county in which the authorizing district is located, and only under specified conditions. A charter school may establish additional “satellite” sites only with the approval of the authorizer.

The site restrictions do not apply to non classroom-based facilities used as resource centers or meeting spaces, or to satellite sites used exclusively for independent or home study, as long as a majority of the charter school pupils are residents of the county in which the charter is authorized. However, an independent study (non classroom-based) charter school may only enroll pupils who live in the county where the charter is authorized or in an adjacent county.

Findings and Recommendations

The FCMAT team met with the Placer County Office of Education to review the initial assessment of charter school student enrollment completed by county office fiscal staff. The team also visited the Newcastle Elementary Charter School to review records and interview staff. Specifically, the team obtained and reviewed copies of all charter school enrollment applications to determine whether parents had voluntarily enrolled their students in the charter school, because the Education Code states that a student cannot be required to enroll in a charter school. The FCMAT team also reviewed all existing inter-district attendance agreements, correspondence sent to site staff and parents, and board minutes related to the public notice and approval of the charter school. Interviews were conducted with both classified and certificated staff.

A review of the district's enrollment processes and records showed that a total of 110 students were initially enrolled in the charter school. During the county office's fiscal review, 25 of those students had no enrollment application on file. Applications for 62 students were on file, having been received and dated in March 2006. At least 32 of the students were Newcastle residents. The FCMAT team verified this information and, in some cases, updated the number and receipt of applications as additional documents were provided by district staff.

FCMAT found that 40 charter school students are Newcastle Elementary School District residents. Many of the other charter school students reside in the town of Newcastle but within the boundaries of surrounding school districts.

The school had not implemented a consistent filing process for charter school students' forms. As a result, additional enrollment forms were located as the superintendent checked student cumulative files and parent employment files.

FCMAT found that many parents had not signed a charter school application form until March 2006, even though most students had been enrolled and attending the school since August 2005. Discussion with school administration and support staff revealed that the superintendent believed that a signature by the parent on the initial charter school petition was sufficient to indicate that the parent wanted their child enrolled in the charter school. A signature on a petition implies support and interest for a proposed action but does not constitute actual voluntary enrollment of children in that school.

Most students residing outside the district who were enrolled in Newcastle Elementary School via inter-district attendance agreements prior to the charter school were automatically enrolled in the charter school; however, parents of new students were asked to complete a charter school enrollment application form prior to their children being enrolled in the charter school. All students enrolled in the charter school should complete a charter school enrollment application annually. Some residents of Newcastle Elementary School District were enrolled in the charter school because of their involvement and interest in the charter school, often without completing an enrollment form. At the beginning of the 2005-06 school year, the district secretary and superintendent attempted to contact

all parents of Newcastle students by telephone to verify their desire to enroll their students in the charter school. In many cases, however, no enrollment form was required of those parents. Notes kept during the telephone process verify that the calls were made in August 2005 and that an attempt was made to contact all involved families.

Upon learning that all charter students should have an enrollment application form on file indicating their voluntary enrollment in a charter school, the superintendent mailed out enrollment forms in March 2006. As a result, many of those forms were returned and dated in March 2006 instead of prior to the beginning of school.

Because of the requirement that enrollment in a charter school be voluntary, a student whose family did not complete the charter school enrollment application could be viewed as involuntarily enrolled in the charter school and, under a strict interpretation of the law, that attendance should be disallowed from the charter school until the parents sign a form indicating their voluntary enrollment of their child in a charter school. Because both regular and charter school students are commingled in the same classroom, parents may not even have realized that their children were in a charter school. However, most students whose parents did not sign the charter school enrollment application until March 2006 did have valid inter-district attendance agreements. As a result, these students could be transferred to the non-charter Newcastle Elementary School. Because charter and non-charter students are commingled and because there is no programmatic difference between the charter and non-charter school classes, this would simply be a matter of paperwork; it would not affect the students in any way, but would allow the district to minimize any loss of funding.

Table 1 summarizes charter school student enrollment and indicates the following:

- The total number of students by district of residence.
- The number of students with valid inter-district attendance agreements, which would allow them to transfer back to the non-charter school if necessary.
- The number of students who are valid Newcastle Elementary School District residents, which would allow the student to transfer back to the non-charter school if necessary, regardless of whether they completed an enrollment application form for the charter school before they began attending.
- The number of students who do not reside in the district and did not have either an inter-district attendance agreement or a charter school enrollment form prior to the start of the school year, and whose attendance may thus be disallowed for all or part of the year.
- The total number of students enrolled in the charter school prior to parental signing of a charter school enrollment agreement, and the ADA that should be disallowed from the charter school but is a valid ADA claim of the Newcastle non-charter school.

Table 1: Charter School Student Enrollment Summary

	Supporting Form	Total Students	Potential ADA Loss
<i>Newcastle School District Resident</i>		40	
<i>Western Placer School District Resident</i>		12	
Inter-District Attendance Agreement	9		
Prior Signed Enrollment Application	2		
Neither App or I.D.	1		2 days
<i>Auburn Union Elementary District Resident</i>		31	
Inter-District Attendance Agreement	15		
Prior Signed Enrollment Application	14		
Neither App or I.D.	2		Less than 30 days
<i>Ophir Elementary School District Resident</i>		15	
Inter-District Attendance Agreement	14		
Prior Signed Enrollment Application	1		
Neither App or I.D.	0		
<i>Other School District Residents</i>		12	
Inter-District Attendance Agreement	9		
Prior Signed Enrollment Application	3		
Neither App or I.D.	0		
Subtotal		110	
Students enrolled prior to enrollment agreement, and related ADA for those students		90	63.6

After reviewing all inter-district attendance agreements and all charter school enrollment applications, FCMAT found three non-resident students who had neither an enrollment application completed prior to attending the charter school nor an inter-district attendance agreement. In all three cases an enrollment application was obtained shortly after the students began attending the charter school, so the total potential disallowed attendance for these three students is substantially less than one ADA. In one case the time lag between attending school and obtaining the enrollment application was only two days; in the other two cases it was less than 30 days. Because the total potential disallowed charter school attendance for those three students is less than one ADA, no revision to the school's attendance forms is recommended. However, as noted previously, the ADA should also be revised for students who had inter-district transfer agreements but had not completed a charter school enrollment form until March 2006.

The law states that teachers cannot be required to teach in a charter school. Although all teachers interviewed indicated that they did not object to the enrollment of charter stu-

dents in their classrooms, none of the teachers had signed an employment contract at the beginning of the school year indicating that they were teaching charter students voluntarily. Because all teachers signed the charter school petition, the superintendent assumed that they were all volunteering to teach charter students. The superintendent learned about the contract requirement when she contacted the CDE charter school division in March 2006 and subsequently sent revised employment contracts to all teachers.

The CDE has not yet issued a policy statement or an interpretation of law with regard to the legitimacy of the charter school's commingling of charter and non-charter students. If the CDE determines that the commingling of charter and non-charter students at Newcastle Elementary School District is not legal, all non-resident charter student attendance not supported by an inter-district attendance agreement would be disallowed. This would affect 20 additional students, whose ADA has not been quantified.

The Legislature's intent is clear in Education Code section 47601. Charter schools are to be operated independently from the existing school district structure. The purpose of this intent is to allow in part for different and innovative teaching methods, parental choice, and vigorous competition within the public schools.

Education Code Section 47602 (a) (1) is very clear relative to the Legislature's intent regarding the commingling of charter and regular district students. Sites that share educational programs and serve similar pupil populations may not be counted as separate schools.

Recommendations

The charter school should:

1. Implement a consistent filing policy and system to ensure that all charter school enrollment applications are kept in a single location.
2. Ensure that the parents of all charter school students complete a charter school enrollment application prior the start of school each year.
3. Determine and document each year which teachers voluntarily teach charter students. Teachers who choose not to teach charter students should be assigned only resident non-charter students.

The county office should:

4. Pursue the policy statement of the CDE related to charter schools implemented under the Education Code sections referenced in this report. Validate the compliance of Newcastle Charter School's operations based on the CDE's position. In the absence of a policy position from the CDE, consult with general counsel for direction on how to proceed locally.
5. Work with the Newcastle district to transfer back to the district the ADA of students enrolled in the charter school prior to the date of a valid charter school enrollment agreement.

Appendices

*Appendix A: Letter from “Concerned Staff, Newcastle School”
and related forms*

March 12, 2006

Alfred D. Nobili
Superintendent, Placer County Office of Education
360 Nevada Street
Auburn, CA 95603

RECEIVED
MAR 15 2006
Placer County
Superintendent of Schools

RE: Newcastle Elementary School

We thought you might be interested in the attached documents recently sent out to parents of Charter School students by Kathleen Daugherty, Superintendent of Newcastle School District. Please note the date that the notice was sent home, and then note the date on the Agreement that is to be signed.

Also attached is a copy of the Certificated "contract" for the 05/06 school year. This "corrected" version was given to staff to sign in late February 2006, **NOT August 11, 2005 as dated**. The contracts signed in August did not include the words **Newcastle Charter School** at the top.

We feel that this backdating of documents is just another way of Mrs. Daugherty continually playing fast and loose with the system, something she does in many instances to push through programs or changes when she meets with resistance, or to obtain funding.

We considered taking this information to our Board of Trustees initially, but effectively we have no Board. They have repeatedly turned a deaf ear to the concerns of many staff members and accept anything Mrs. Daugherty tells them at face value, something we believe they will someday regret.

Thank you,

Concerned Staff
Newcastle School

Cc: Jack O'Connell, State Superintendent of Public Instruction
Marta Reyes/Charter Schools Division/California Dept. of Education
Placer County Grand Jury



Newcastle Elementary School District

BOARD OF TRUSTEES

Mr. Steve Peck
Mrs. Tara Odell
Mr. Michael Leydon
Mrs. Janet Riswold
Ms. Tara Mills

8951 Valley View Dr. ♦ Newcastle CA 95658 ♦ (916) 663-3307 ♦ Fax (916) 663-3524

KATHLEEN DAUGHERTY, *Superintendent/Principal*

PLEASE RETURN ENCLOSED FORMS BY MONDAY, MARCH 13th.

March 8, 2006

Dear Newcastle Charter Parents,

You are receiving this notice because your child is registered as a Newcastle Charter Student. Students living out of the Newcastle District who were previously enrolled as Interdistrict Transfer students are now eligible to apply as Charter students as well as those families who have chosen to have their child/ren registered as Charter students.

The attached 2 forms need to be completed and returned to keep on file for our auditors. It is imperative that these forms be returned to the office no later than Monday, March 13th to be included in your child's records. If you have already completed the forms, please give the office a call to verify that both forms have been completed.

As an added incentive, if both of these forms are returned by Monday the 13th, your child will receive a Stellar Knight.

Thanks for your prompt attention to this request.

Sincerely,

Kathleen Daugherty
Principal/Superintendent

Newcastle Elementary School District
Newcastle Charter School Student—Parent—School Agreement

The Newcastle Elementary School District is committed to an instructional program consisting of high academic standards that are designed to prepare students for the 21st Century and to be among the nation's best. That curriculum is dependent upon maintaining safe school environments and classrooms conducive to learning, which can only be achieved through the total cooperation of the student and a positive, supportive relationship between the home and the school.

The purpose of this Agreement is to establish such a relationship—

Student responsibilities:

1. Protect the rights of others to study and learn
2. Work to their full potential
3. Be on time for all classes
4. Follow school rules
5. Volunteer information and cooperate with school staff in disciplinary cases
6. Complete all in-class and homework assignments and meet deadlines
7. Respect public property and carefully use and return all materials and equipment
8. Come to class with necessary books and materials
9. See that school correspondence to parents reaches home

Parent responsibilities:

1. Demonstrate positive interest, involvement and support of the education process of the district
2. Communicate directly with the school when expressing a concern over a school action, program or policy
3. Provide supervision and a learning environment for the completion of homework assignments
4. Monitor and review all student assignments and classroom progress
5. Ensure that students are prepared and appropriately dressed for school
6. Cooperate with the school in resolving student academic or behavioral problems

School responsibilities:

1. Focus on an academic program that will enhance the student's ability to be successful
2. Provide an educational environment that is safe, orderly and challenging
3. Make meaningful assignments designed to further the educational goals of the program
4. Recognize learning variability by utilizing a variety of teaching strategies
5. Utilize educational technology as a means to enrich and further the curriculum
6. Recognize the key role parents play in the educational process. Maintain appropriate communication to include parents as partners in their child's educational and behavior.
7. Recognize and respect the values representative in the home of the student

Student (Signature)

Student (Printed Name)

9/6/05
Date

Parent (Signature)

Parent (Printed Name)

9/6/05
Date

Teacher (Signature)

Teacher (Printed Name)

9/6/05
Date

NEWCASTLE CHARTER SCHOOL APPLICATION

_____-20____ SCHOOL YEAR

Please Complete One Form Per Child

☐ Out of County

☐ Placer County Schools

PLEASE READ THE FOLLOWING PRIOR TO COMPLETING FORM:

Approval is limited to space available in requested grade level. Priority students will be placed first. If there are more applicants than spaces available, students will be selected through a random lottery process. I understand I will need to complete registration forms and develop a Family Participation Plan, which includes an agreement to abide by the academic and behavior rules of the school.

Student Name _____ Grade _____ DOB _____

Physical Address _____

Mailing Address _____

Parent/Guardian Name _____

Parent/Guardian Phone: Home _____ Work _____ Other _____

Resident District _____

Previous School _____

Special Needs (i.e. RSP, Speech, Special Ed) _____

Date of last Annual or Triennial IEP (if applicable) _____

Reason for Request: ☐ Newcastle Resident _____
☐ Child Care (Name/Phone) _____
☐ Other (Be Specific) _____

) This agreement may be revoked for violations of district rules and/or school rules related to discipline/behavior/attendance.

) Transportation is not provided and is the responsibility of the undersigned.

) Are you currently under an expulsion order? ☐ Yes ☐ No

If Yes, from which school/district? _____

Parent/Guardian (please print name) _____

Parent/Guardian Signature _____ Date _____

Office Use Only

☐ Granted

☐ Denied

 Superintendent/Principal Signature

Dated _____

Office Use Only

Priority # _____

Date received _____

WHITE: District

YELLOW - Parent/Guardian

NEWCASTLE ELEMENTARY SCHOOL DISTRICT

- Newcastle Elementary School
- Newcastle Charter School

CERTIFICATED PERSONNEL EMPLOYMENT INFORMATION

2005/2006

Given to teachers in February, 2006

DATE: August 11, 2005

TO:

FROM: Nancy McKenzie, Business Manager

RE: Class Assignment, Salary Information & Sick Leave for 05/06

Assignment:

Assignment is for both Newcastle Elementary School and Newcastle Charter School

Employment Status: ☐ temporary ☐ probationary (1-2) ☒ permanent

Dates of Employment: 7/1/05 - 6/30/06

Step on Salary Schedule:

You have on record days of accumulated sick leave as of June 30, 2005

You will earn an additional 10 days of sick leave/personal time during the 2005/06 school year.

If you have any questions on the above information, please contact me ASAP.

Employee Signature _____ Date _____

Approved By Kathleen Daugherty Date 8/15/05
Kathleen Daugherty, Superintendent/Principal

Please return original signed copy to Nancy McKenzie.

Appendix B: Study Agreement

MANAGEMENT ASSISTANCE TEAM
STUDY AGREEMENT
April 6, 2006

The FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM (FCMAT), hereinafter referred to as the Team, and the Placer County Office of Education, hereinafter referred to as the COE, mutually agree as follows:

1. BASIS OF AGREEMENT

The Team provides a variety of services to school districts and county offices of education upon request. The COE has requested that the Team provide for the assignment of professionals to study specific aspects of the Newcastle Charter School operations. These professionals may include staff of the Team, County Offices of Education, the California State Department of Education, school districts, or private contractors. All work shall be performed in accordance with the terms and conditions of this Agreement.

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

The scope and objectives of this study are to conduct a review of the Newcastle Charter School related to the following issues:

- 1) Verify that charter school student enrollment and application forms were filled out completely, signed, and dated by parents prior to the first day of student attendance.
- 2) Verify that approved inter district agreements are on file for non-resident students.
- 3) Verify that apportionment received for 2005-06 was earned in compliance with student enrollment and attendance requirements and certified reports.
- 4) Verify if regular district students and charter students are co-mingled in Newcastle Elementary School District classrooms.
- 5) Verify if the provisions of the Newcastle Charter School Petition "Application and Enrollment Process" and the "Timeline Application for the Initial School Year" were followed in the startup of the charter school in 2005-06?
- 6) Verify if any questionable practices in the past or at the present time are taking place that could be considered fraudulent.
- 7) Quantify the potential revenue loss relative to ADA that may be disallowed for reasons referenced in scope points #1, #2, and #3.

B. Services and Products to be Provided

- 1) Orientation Meeting - The Team will conduct an orientation session at the COE to brief COE management and supervisory personnel on the procedures of the Team and on the purpose and schedule of the study.

- 2) On-site Review - The Team will conduct an on-site review at school sites, and at the COE office, if necessary.
- 3) Progress Reports - The Team will hold an exit meeting at the conclusion of the on-site review to inform the COE of significant findings and recommendations to that point.
- 4) Exit Letter - The Team will issue an exit letter approximately 10 days after the exit meeting detailing significant findings and recommendations to date and memorializing the topics discussed in the exit meeting.
- 5) Draft Reports - Sufficient copies of a preliminary draft report will be delivered to the COE administration for review and comment.
- 6) Final Report - Sufficient copies of the final study report will be delivered to the COE following completion of the review.

3. PROJECT PERSONNEL

The study team will be supervised by Barbara Dean, Deputy Administrative Officer, Fiscal Crisis and Management Assistance Team, Kern County Superintendent of Schools Office. The study team may also include:

- A. Michele Dodge, CPA, FCMAT Consultant

Other equally qualified consultants will be substituted in the event one of the above noted individuals is unable to participate in the study.

4. PROJECT COSTS

The cost for studies requested pursuant to E.C. 42127.8(d)(1) shall be:

- A. \$400.00 per day for each Team Member while on site, conducting fieldwork at other locations, presenting reports, or participating in meetings.
- B. All out-of-pocket expenses, including travel, meals, lodging, etc.
- C. Based on the scope listed in item 2 A, a preliminary estimate of cost is \$7,500. During field work, FCMAT will update PCOE on the extent of the circumstances involved and require pre-approval from PCOE for additional time needed once the \$7,500 estimate has been reached.

Payments for FCMAT services are payable to Kern County Superintendent of Schools-Administrative Agent.

5. RESPONSIBILITIES OF THE COE

- A. The COE/Newcastle Elementary School District will provide office and conference room space while on-site reviews are in progress.

- B. The COE Administration will review a preliminary draft copy of the study. Any comments regarding the accuracy of the data presented in the report or the practicability of the recommendations will be reviewed with the Team prior to completion of the final report.

Pursuant to EC 45125.1(c), representatives of FCMAT will have limited contact with COE pupils. The COE shall take appropriate steps to comply with EC 45125.1(c).

6. PROJECT SCHEDULE

The following schedule outlines the planned completion dates for key study milestones:

Orientation:	April 11, 2006
Staff Interviews:	April 11-13, 2006
Exit Interviews:	To be determined
Preliminary Report Submitted:	To be determined
Final Report Submitted:	To be determined
Board Presentation:	To be determined

* Dates are subject to receipt of signed agreement by FCMAT prior to the Orientation meeting.

7. CONTACT PERSON

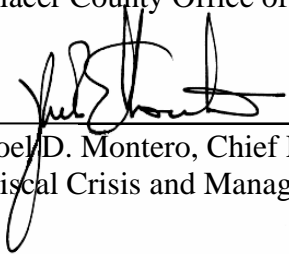
Please print name of contact person:

Joan Kingery Assistant Superintendent of Business Services _____

Telephone 530 889-5920 FAX 530 889-5995

Internet Address jkingery@placercoe.k12.ca.us

Alfred "Bud" Nobili, County Superintendent Date
Placer County Office of Education



Joel D. Montero, Chief Executive Officer Date
Fiscal Crisis and Management Assistance Team