

JUNE 13, 2003

Colleen B. Wilcox, Ph.D.  
Superintendent of Schools  
Members of the County Board of Education  
SANTA CLARA COUNTY OFFICE OF EDUCATION  
1290 Ridder Park Drive  
San Jose, CA 92008

VIA HAND DELIVERY

**Re: Bullis Charter School's Appeal to the Santa Clara County Board of Education**

Dear Superintendent Wilcox:

I am pleased to submit a charter for the Bullis Charter School ("BCS") to the Santa Clara County Board of Education for formal consideration.

BCS is a nonprofit public benefit corporation developed by parents of students enrolled in the Bullis-Purissima Elementary School, which has been slated to close at the end of the 2002-2003 school year. In order to regain a local school to serve the community of Los Altos Hills, parents and community members have worked tirelessly with experts throughout the state on curriculum, school finance, and charter school law to develop BCS. BCS is dedicated to developing a strong collaborative community which nurtures excellence in education, fosters a love of learning and social responsibility, and builds respect for individuality and diversity.

This charter petition was originally submitted to the Los Altos School District ("LASD") and subsequently denied by the LASD Board on May 5, 2003. The charter, along with all the attachments included in this binder, constitutes an appeal to the Santa Clara County Board of Education pursuant to California Education Code Section 47605(j)(1), Title 5 of the Cal. Code of Regulations ("CCR") Section 11967, and the Santa Clara County Board Policy ("Board Policy") on charter schools (BP6230 & AR6230). Included in this binder are the following documents as required by 5 CCR Section 11967(b) and the Board Policies:

**TAB DOCUMENT DESCRIPTION**

- A. The BCS Charter Petition as submitted to LASD.
- B. Petition signatures.
- C. Impact Statement submitted to LASD.
- D. Memorandum from Marge Gratiot, Superintendent of LASD dated May 5, 2003, to the LASD Board of Trustees.
- E. Resolution adopted by the Board of Trustees of LASD on May 5, denying the charter and making factual findings in support of the denial.
- F. A signed certificate of compliance with laws (required by 5 CCR 11967(b)(3)).
- G. A redline version of the charter with changes necessary to reflect the Santa Clara County Board of Education as the granting authority. With the exception of these

changes, the charter petition is the same charter petition that was submitted to the Los Altos School District. (Required by 5 CCR 11967 (b)(4) and AR 6230 2.0 (h)).

- H. The Articles of Incorporation of the nonprofit public benefit corporation; (Required by AR 6230 2.0 (g)).
- I. A list of the BCS Board of Directors (as required by AR 6230 2.0(f)), BCS Advisors, BCS Foundation Directors, and Biographies.
- J. A description of BCS's planned compliance with Government Code Section 54950, et. seq. ("The Brown Act") and Government Code Section 6250, et. seq. ("Public Records Act" or "PRA"). (As required by AR 6230).
- K. Letters of Support from Community Members and Resolution by the Los Altos Hills Town Council.
- L. Questions from the LASD Board of Trustees and Responses submitted by BCS.
- M. BCS responses to District findings.
- N. Additional Information Developed by BCS as relates to the operation of the School.

#### **LASD Did Not Comply with the Charter Schools Act**

1. The Board of Trustees and its employees have violated Education Code Section 47605 (b) that in reviewing charter school petitions, the District board shall be guided by the intent of the Legislature that charter schools are and should become an integral part of California public schools and establishment of charter schools should be encouraged. Instead this Board and its employees have done just the opposite and attempted to discourage any charter school within the District as follows:
  - The Principal of the current Bullis-Purissima school complained to the press that the charter parents were being "divisive" for even suggesting a charter school or gathering signatures. (Los Altos Town Crier)
  - The Superintendent gave speeches publicly and privately that a charter school would be fiscally damaging to the District and encouraged teachers and parents elsewhere in the District to oppose the petition. (Los Altos Town Crier)
  - The Board of Trustees hired a law firm of Miller, Brown & Dannis to give a "public workshop" to the Board on charter schools. Such a workshop was put on by of Matti Scott, Esq. and Janet Mueller, Esq. The workshop was a two-hour negative recitation on charters including "I cannot think of a single academically rigorous charter school in the State." "Charter schools are a pain in the neck." "Charter schools leave the District very vulnerable to Special Ed expenses." We believe this anti-charter workshop was delivered at the specific instruction of the Superintendent.

- The President of the Board of Trustees declared, in violation of the Brown Act, "Bullis-Purissima site will not be available to the Bullis Charter School for the foreseeable future." This declaration was made without any public hearing on this decision and was simply another District attempt to discourage support for BCS.
2. The Board of Trustees has demonstrated their ignorance of the Education Code by opposing the petition. Education Code Section 47605 (b) states a school district governing board shall grant a charter for the operation of a school under this part if it is satisfied that granting the charter is consistent with sound education practice. The Board found that the charter presented an unsound educational program on the basis of the "lack of innovation" of the program because the charter for BCS adopts the District's core curriculum. This determination by the Board invents new Education Code provisions and ignores that the core curriculum is the same as the District's and therefore considered by the District sound educational practice.
  3. Furthermore, BCS is an innovative approach to educating children in Los Altos School District, Los Altos Hills, and the State of California. As part of this appeal, we include under Tab 10 the questions raised by the Board of Trustees and the responses we provided to the Board prior to their action. Throughout the District's findings, they ignore all of our responses that make clear the areas of innovation important to our children.
    - First, the governance and administration is separate and unique from the District and will respond to a smaller constituency of parents, teachers and students. Thus the priorities of the school will be based upon the local needs, rather than a homogenized diluted version of what six different elementary schools want and desire. The BCS charter clearly delineates the methodology for selecting a Board of Trustees as well as Principal and the input of both the faculty and a PTC for parent involvement.
    - Second, the BCS charter and our response to District questions clearly speak to the importance of a smaller school in the educational process. Individual student achievement can be emphasized through a smaller school, smaller class sizes, and focus on individual learning programs. The smaller school is typical of charter schools. According to Education Week:

"A chief reason for charter schools' appeal is that they are typically smaller than their more traditional counterparts, advocates say. According to the Center for Education Reform (2002), the average charter school enrollment is

242, compared with 539 in traditional public schools. Researchers—and no doubt parents—link small schools with higher achievement, more individualized instruction, greater safety, and increased student involvement.” April 28, 2003

- The LASD has embarked on a program of opening up a new large elementary school, Covington, which can hold over 700 students and closing smaller elementary schools such as Bullis-Purissima (2002-2003 enrollment of 340). The District’s justification is cost containment, but the result is no smaller school option for District residents.
- Third, the BCS charter clearly notes the importance of smaller class size in the philosophy behind the school. Much literature has been written and reviewed about the importance of smaller class size. BCS is dedicated to no more than 20 students in K-3 and 25 in 4-6 grades. This is a major differentiation from the District-run schools and popular among parents and students.
- Fourth, the BCS charter notes the importance of fully staffed PE, music, and arts as helping teach to the total child. The District simply criticizes the charter for potentially not having the revenue to embark on this desired staffing level the first year. This is not a reason to turn down a charter. The charter itself clearly recognizes that these added benefits will have to be implemented, as funds are raised and available. No initiative worth completing is fully funded with all of its attributes day one. The District purposely confuses the issue of genuine and laudable goals of the BCS and funds available day one to implement all goals.
- Fifth, the charter school is intended to be located in the rural setting of Los Altos Hills (“LAH”). In answer to District questions it was made clear that the LAH setting and its natural environment is important to BCS. The District had such information available to them prior to completing their findings, but their findings ignore it. We believe a Los Altos Hills-based school can take educational advantage of the unique geography and history of this setting. Currently Bullis-Purissima is the only LASD School in a rural setting and the only one in LAH. LAH itself has a very different geography, ecology, and history than Los Altos. Among the unique features of LAH are the amounts and natural beauty of natural open space, the pedestrian, bike, and horse pathways criss-crossing LAH, and the facilities such as Westwind Barn and Hidden Villa. We believe we can take advantage of these assets by emphasizing local field trips in the area and teaching about both the value of the local ecology and the historical and political forces preserving these assets. Thus we strive to



imbue our children with both an appreciation of the natural world and a sense of environmental citizenship. A key local asset in this endeavor is the UCSC Extension program on Environmental Education Certificates for K-6 Teachers. We expect to expose our teachers to this program including classes such as "Interdisciplinary Teaching on the Trail" and "Enhancing Classroom learning with Field Trip Experiences" and "Neighborhood Nature: Connecting Kids to Their Environment".

4. The District refused to meet with BCS despite repeated attempts by BCS (in writing and orally) to set up meetings between our representatives and the representatives of the Board of Trustees. It appears that this was done because the District never had any intention to approve this or any other charter. One member of the Board of Trustees went so far as to say she was curious about charters but "not in my district" at the public hearing. The "findings" of the District represent just the compilation of virtually everything District lawyers could advise as possible grounds for denying any charter in the hopes that something would "stick." There never was any question of a positive response from the District even before the BCS petition was filed, only as to which legal grounds could be claimed to support denial. There was never a good faith effort to work with BCS to refine the charter to meet the concerns of the District or discussions regarding the draft budget included. The draft budget was not part of the charter but indicative of the financing requirements and uses of funds.

### **Community Support**

As you can see, the charter proposal was supported by 328 parents or guardians of pupils - four times the amount of legally required signatures. Additionally, the Los Altos Hills Town Council voted unanimously in favor of the Charter School on April 17, 2003.

### **Requested Process for Review of the Charter Petition**

As you are aware, Education Code Section 47605(j)(1) provides that the County Board of Education shall review a petition on appeal pursuant to the procedures set forth in Education Code Section 47605(b). Education Code Section 47605 and BP 6230 Section 3.2 provides the County Board thirty (30) days to hold a public hearing on the provisions of the charter. Following this review of the charter petition and the public hearing, the County Board shall either grant or deny the charter petition within sixty (60) days of the receipt of the charter petition, unless both the County Board and the petitioner agree to extend the timelines by an additional thirty (30) days.

I respectfully request that BCS be notified in writing of the date assigned for the public hearing in this matter. Please direct all notifications and requests for further information to:

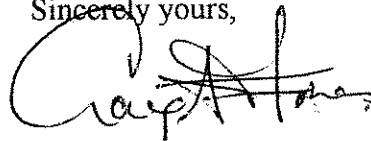
Colleen B. Wilcox, Ph.D.  
RE: BCS Charter Appeal  
June 13, 2003  
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Craig A.T. Jones  
Lead Petitioner and Chairman,  
on behalf of  
The Bullis Charter School Board of Directors  
27297 Byrne Park Lane  
Los Altos Hills, CA 94022  
(650) 279-0378

BCS looks forward to working with the Santa Clara County Board of Education and the Superintendent's Office in a cooperative fashion. I look forward to commencing the appeals process with you and the County Board of Education. Accordingly, I am eager to begin discussions with you and the County Board and welcome your comments and suggestions on this petition. I respectfully request that your office and/or the County Board notify me of any suggested revisions so that we may discuss and revise as appropriate.

Thank you for your time and consideration of this matter. Please do not hesitate to contact me if you have any questions or concerns.

Sincerely yours,



Craig A.T. Jones  
Lead Petitioner and Chairman, on behalf of  
The Bullis Charter School Board of  
Directors.

cc: Margaret Abe-Koga, Santa Clara County Board of Education (with binder)  
Alex Bantis, Santa Clara County Board of Education (with binder)  
Leon F. Beauchman, Santa Clara County Board of Education (with binder)  
T.N. Ho, Santa Clara County Board of Education (with binder)  
Don Kruse, Santa Clara County Board of Education (with binder)  
Anthony Munõz, Santa Clara County Board of Education (with binder)  
Anna Song, Santa Clara County Board of Education (with binder)  
Porter Sexton

# **BCS CHARTER PETITION**

March 10, 2003

Duane Roberts, President  
Board of Trustees  
Dr. Margaret H. Gratiot, Superintendent  
LOS ALTOS SCHOOL DISTRICT  
201 Covington Road  
Los Altos, CA 94024

**Re: Petition for the Creation of Bullis Charter School  
Los Altos School District**

Dear Mr. Roberts and Dr. Gratiot:

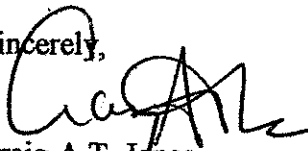
A charter petition for the Bullis Charter School is enclosed. The petition contains the signatures of 328 parents or guardians of pupils who are meaningfully interested in having their child or ward attend the school. They represent over 200% of the number of pupils that the school anticipates enrolling during the first year of operation.

We hereby submit the petition and request that the staff and Governing Board of the Los Altos School District review and grant the charter pursuant to the process and timelines specified in Education Code Section 47605. We look forward to engaging in extensive and productive discussions with administration and the members of the Board to successfully identify and resolve all relevant concerns and issues. We look forward to developing a charter school and educational programs that lead to a positive and lasting partnership between the charter school and district.

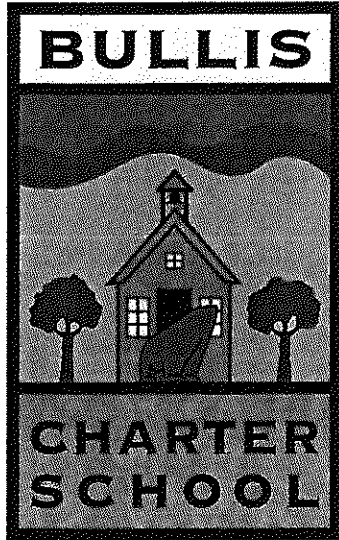
Though we have a well-rounded group of individuals assisting in this effort, and many individuals have signed the enclosed petition, I have been selected by the group to act as the Lead Petitioner and will serve as the group's liaison for all communications during the review and approval process. We look forward to the hearing and approval process. We understand that an initial public hearing of this charter petition will be held by April 11, 2003 and that a decision to grant or deny the charter will occur by May 10, 2003 as required by the Charter Schools Act. Please do not hesitate to contact me if you or any other Board Member has any remaining questions or concerns.

Thank you for your support.

Sincerely,



Craig A.T. Jones  
Lead Petitioner



# BULLIS CHARTER SCHOOL

A CALIFORNIA PUBLIC

CHARTER SCHOOL

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# BULLIS CHARTER SCHOOL

## AFFIRMATIONS

The Bullis Charter School shall be non-sectarian in its programs, admissions policies, employment practices, and all other operations, shall not charge tuition, and shall not discriminate against any pupil on the basis of race, ethnicity, national origin, gender, or disability.

The Bullis Charter School shall admit all pupils within the State of California who wish to attend the School subject to capacity.

All meetings of the Board of the Bullis Charter School shall be held in compliance with the Brown Act.

The Bullis Charter School shall comply with all applicable state and federal laws in serving students with disabilities including, but not limited to, Section 504 of the Rehabilitation Act, the Americans with Disabilities Act and the Individuals with Disabilities in Education Act.

The Bullis Charter School shall offer at a minimum, the same number of minutes of instruction set forth in paragraph (3) of subdivision (a) of Education Code Section 46201 for the appropriate grade levels.

The Bullis Charter School shall maintain accurate and current written records that document all pupil attendance and make these records available for audit and inspection.

The Bullis Charter School shall meet all state standards and conduct the pupil assessments required pursuant to Education Code Section 60605 and any other statewide standards authorized in statute or pupil assessments applicable to pupils in non-charter public schools.

The Bullis Charter School shall on a regular basis consult with its parents and teachers regarding the School's education programs.



## I. EDUCATIONAL PROGRAM

*A description of the educational program of the School, designed, among other things, to identify those whom the School is attempting to educate, what it means to be an educated person in the 21st century, and how learning best occurs. The goals identified in that program shall include the objective of enabling pupils to become self-motivated, competent, and lifelong learners.*

*- California Education Code Section 47605 (b) (5) (A)*

### HISTORY

From 1962 to June, 2003, the Bullis Purissima School operated as a traditional school site within the Los Altos School District ("District"). On February 10, 2003, the District Board voted to close the traditional school site, and in so doing, reroute the existing pupils and teachers of the Bullis Purissima School to other District schools. Parents and interested members of the community joined together to form the Bullis Charter School ("School"), a non-profit, public benefit corporation, to create a charter school and operate the School on the campus of the former traditional school. As the former traditional school was award-winning, with a statewide ranking and similar school ranking of 10 on the 2002 Academic Performance Index ("API"), the parents and community members are seeking to build upon the former educational program of the traditional school.

### MISSION STATEMENT

Bullis Purissima School is dedicated to developing a strong collaborative community which nurtures excellence in education, fosters a love of learning and social responsibility, and builds respect for individuality and diversity.

### GOALS

The School is dedicated to developing a strong collaborative community which nurtures excellence in education, fosters a love of learning and social responsibility, and builds respect for individuality and diversity. The School shall seek to build upon the success of the former traditional school site, in creating well-rounded students who are self-motivated, competent, life-long learners who view school as an experience, a community, and a means to a great beginning in academic and professional life.

### CORE VALUES

**COMMUNITY--Community means we care about each other like a family.** Because we value community each person will understand that as citizens we have duties and responsibilities, as well as rights. It is important that we work together to achieve goals and to make our world a better place. Bullis-Purissima is not the building, the teachers, the students, nor the parents; it is all of them put together.

**HONESTY--Honesty means we tell the truth.** Because we value honesty we expect that each person will share ideas openly, in a climate of trust and integrity so that what is written or said can be accepted as truth. We are honest so that we can trust our relationships with others.

**RESPECT--Respect means we honor ourselves and others.** Because we value respect we expect that each person will respond sensitively to the ideas and needs of others without dismissing or degrading them. People, our school, and our community are held in high regard. Respect for oneself, fellow students, parents, teachers, learning, and property is shown in the following ways:

**COMPASSION--Compassion means we care about others.** Because we value both compassion and tolerance, we can be sympathetic to others' distress and make attempts to decrease it. We can "stand in the shoes" of others to understand another's viewpoint. This requires acceptance and appreciation of differences of opinion, religion, race, heritage, family viewpoints, and opinions.

**RESPONSIBILITY--Responsibility means we take ownership for our actions.** Because we value responsibility each person will be accountable for attempting to achieve his or her full potential. This requires self-discipline, taking initiative, and being willing to take risks.

#### **WHOM THE SCHOOL IS ATTEMPTING TO EDUCATE:**

The School seeks to educate all students in the state of California who wish to attend the School subject only to capacity, with a focus on serving primarily the former students and siblings of the traditional public school, students within the former Bullis Purissima boundaries and the Los Altos Hill Community as a whole and secondarily residents of the Los Altos School District as a whole and Santa Clara County. The School seeks to preserve a neighborhood school environment, serving kindergarten through sixth grade students.

#### **WHAT IT MEANS TO BE AN "EDUCATED PERSON" IN THE 21ST CENTURY?**

An "educated person" in the 21st century is a lifelong learner who has developed competence, self-motivation, confidence, and responsibility.

#### **THE ACADEMIC ATTRIBUTES OF AN EDUCATED PERSON IN THE 21ST CENTURY INCLUDE:**

- Knowledge of and ability to demonstrate solid skills in reading, writing and speaking;
- A core knowledge which includes cultural, mathematical and scientific literacy;
- Understanding of the scientific process;
- Knowledge of history;
- Ability to think critically, creatively, analytically, and logically;
- Ability to use technology as a tool and understanding its uses;
- Ability to gather and organize information;

Understanding of the mathematical process including application;  
Ability to critically assess data;  
Ability to appreciate, enjoy and respect the visual and performing arts;  
An understanding of the political process.

### **THE PERSONAL ATTRIBUTES OF AN EDUCATED PERSON IN THE 21ST CENTURY INCLUDE:**

Concentration, focus and perseverance;  
Ability to work cooperatively with others;  
Adaptability;  
A strong sense of connection to and responsibility for the world;  
Valuing relationships, respect for others and for authority;  
Ability to honor differences including cultural, ideological and philosophical;  
Resourcefulness, confidence and motivation;  
Enthusiasm, a sense of wonder and curiosity;  
A passion for lifelong learning;  
Clearly developed emotional intelligence;  
Ability to communicate with respect and compassion;  
A strong social conscience;  
Celebrates diversity;  
A global perspective;  
Ability to think logically, make informed evaluations and problem solve

### **HOW LEARNING BEST OCCURS**

The School believes that each and every child can be academically successful and that each and every student is unique. The School believes that learning best occurs in self-contained classrooms led by teachers with the skills and knowledge of a variety of teaching techniques and methods, and specialized materials that can meet the instructional needs of every student. The school also believes in the use of meaningful assessment methods in order to prescribe the best teaching methods for each student.

Although there is no assurance that each child will master every instructional area, a major effort will be made to ensure maximum understanding and mastery. We believe that the potential for learning best occurs in environments that include meaningful content with choices for learning; adequate time, space and materials; immediate and meaningful feedback and benchmarks of progress; enriched environment and collaborative learning opportunities.

Teaching methods should include, but are not limited to:

- Inquiry method of instruction
- Small classes, and opportunities for small group learning
- Interactive, experiential learning opportunities
- Use of state-adopted materials and supplemental materials that reinforce state standards

## **INSTRUCTIONAL PROGRAM**

The School shall adopt and implement the comprehensive, rigorous core curriculum similar to the one used by the former traditional school site. The curricular materials meet all state standards and prepare students for the annual state assessment tests. State approved textbooks shall be used at all grade levels. The core curriculum for our students focuses on the areas of mathematics, reading, language arts (both oral and written), social studies and science. All students shall also receive instruction in physical education, fine and performing arts, music, life skills, and reference/computer skills.

Teachers will receive on-going professional development in the implementation of this curriculum, and will be encouraged to supplement and adapt materials according to local conditions and needs of the student population.

The Principal and professional staff will be knowledgeable of local instructional networking opportunities, such as the Bay Area Schools for Excellence in Education (BASEE), Music for Minors, and Arts in Action. Staff will explore their applicability to our school environment and their potential to leverage school resources, further develop site expertise, and enhance student- learning outcomes. Staff will also be responsible for managing such programs and designing meaningful assessments of success.

The School shall operate a longer school day and/or a longer school year, i.e., the number of minutes of instruction in the student year meets or exceeds state standards.

## **ENGLISH LANGUAGE LEARNERS**

The School shall continue to serve and provide English Language Learners ("ELL") at the school site through a sheltered English immersion program. Under this program the student is enrolled in a regular class and receives supplementary instruction in order to learn English. The School shall comply with all applicable federal law in regard to services and the education of English Language Learner ("ELL") students. The School shall develop and implement, and maintain policies and procedures for the provision of services to ELL students in accordance with guidance published by the Office of Civil Rights of the U.S. Department of Education. At a minimum these policies and procedures shall ensure the following:

Identify students who need assistance;

Develop a program which, in the view of experts in the field, has a reasonable chance for success;

Ensure that necessary staff, curricular materials, and facilities are in place and used properly;

Develop appropriate evaluation standards, including program exit criteria, for measuring the progress of students; and assess the success of the program and modify it where needed.

### **SPECIAL EDUCATION STUDENTS AND STUDENTS WITH DISABILITIES**

The School shall comply with all applicable state and federal laws in serving students with disabilities including but not limited to Section 504 of the Rehabilitation Act ("Section 504"), the Americans with Disabilities Act ("ADA") and the Individuals with Disabilities in Education Act ("IDEA").

The School shall be solely responsible for its compliance with Section 504 and the ADA.

The School intends to function as a "public school of the local education agency that granted the charter" for purposes of providing special education and related services under the IDEA pursuant to Education Code Section 47641(b).

Special education services shall be provided and funded in accordance with the terms of a memorandum of understanding ("MOU") with the District.

## II. MEASURABLE PUPIL OUTCOMES

*The measurable pupil outcomes identified for use by the School. "Pupil outcomes" for purpose of this part, means the extent to which all pupils of the school demonstrate that they have attained the skills, knowledge, and attitudes specified as goals in the school's educational program.*

*- California Education Code Section 47605 (b) (5) (B)*

In order to best serve our students and community, the School will continue to examine and refine its list of student outcomes over time to reflect the school's mission and any changes to state or local standards that support such mission.

### STATE CONTENT STANDARDS

The School is dedicated to documenting at least 85% student achievement of the state content standards each year in its core subjects.

### STATE STANDARDIZED TESTING

At least 85% of students will show one grade or skill level's worth of progress each academic year, as evidenced by scores on the CAT 6 exam.

### ATTENDANCE

The School shall strive, on average, to achieve student attendance comparable to other schools in the District in any given year.

### ACADEMIC PERFORMANCE INDEX

The School shall strive to maintain its API score and/or appropriate growth target.

### III. METHODS TO ASSESS PUPIL PROGRESS TOWARD MEETING OUTCOMES

*The method by which pupil progress in meeting those pupil outcomes is to be measured.  
- California Education Code Section 47605 (b) (5)(C)*

Pupil progress toward meeting the Student Outcomes shall be measured by state mandated annual standardized assessments. Standardized assessments allow us to compare our students' performance with the rest of the state. In the absence of a State Mandated test, the School will administer another nationally, standardized test. In addition, the school will provide internal learning performance accountability documentation.

This internal documentation may include, but is not limited to, student progress records at the end of each grading period, portfolios, teacher generated examinations and other methods by which student progress may be assessed. In addition, students will take home weekly completed schoolwork to keep parents informed of the nature and quality of work occurring in the classroom. The School shall encourage teachers to explore meaningful measurable outcomes to supplement the above instruments and promote teacher accountability.

Measurable pupil outcomes	Local Benchmark Instruments	State-level Year-end assessments
85% student achievement of the state content standards each year in its core subjects.	Student progress records, portfolios, locally developed/adopted content and skill assessment instruments	Current state accountability measures: for example, STAR: CAT6, SAT9, writing assessments
At least 85% of students will show one grade or skill level's worth of progress each academic year, as evidenced by scores on the CAT 6 exam.	Practice sheets as needed	Current state accountability measures: for example, STAR: CAT6, SAT9, writing assessments
At least 85% student attendance	Daily attendance reporting	Calculated ADA rate
Maintain or exceed the Academic Performance Index of the former traditional school site. Academic performance index	Annual growth targets	Current state accountability measures: for example, STAR: CAT6, SAT9, writing assessments

#### IV. GOVERNANCE STRUCTURE OF THE SCHOOL

*The governance structure of the school, including, but not limited to, the process to be followed by the school to ensure parental involvement.*

*- California Education Code Section 47605 (b) (5) (D)*

The School will be non-sectarian in its programs, admissions policies, employment practices, and all other operations. The School shall not charge tuition and shall not discriminate on the basis of race, ethnicity, national origin, gender or disability.

The School shall be operated as a California 501(c)(3) non-profit public benefit corporation separate from its supporting Foundation. The Articles of Incorporation are filed with the California Secretary of State. The School shall be governed pursuant to its Corporate Bylaws which shall be consistent with this charter. Pursuant to Education Code Section 47604(c), the District shall not be liable for the debts and obligations of the School, operated as a California non-profit, public benefit corporation.

The School shall operate autonomously from the District with the exception of supervisory oversight and special education services as required by statute.

##### A. NON-PROFIT BOARD OF DIRECTORS

The School will be governed by a non-profit board of directors, whose major roles and responsibilities will include but not be limited to establishing and approving all major educational and operational policies, approving all major contracts, approving the School's annual budget, overseeing the school's fiscal affairs, meeting corporate requirements, and selecting and evaluating the administrative staff.

##### Duties

The School Board shall have ultimate responsibility for the operation and activities of the School. School Board members have a responsibility to solicit input from, and opinions of, the parents of School students regarding issues of significance and to weigh the input and opinions carefully before taking action. The primary method for executing their responsibility is the adoption of policies that offer guidance and interpretation of the charter, and procedures to assist the staff in facilitating the implementation of such policies.

The School Board will meet at least once a month or additionally as needed and will be responsible for carrying out School Board responsibilities including but not limited to the following:

- Development, review, or revision of the School's accountability and mission;
- Review of the recommendations from the School Principal and hiring committee for the hiring of School personnel or independent contractors;



- Development of the school calendar and schedule of School Board meetings;
- Development of School Board policies and procedures
- Development and approval of the annual budget;
- Review of recommended curriculum changes as needed;
- Review of requests for out of state or overnight field trips;
- Participation in the dispute resolution procedure and complaint procedures when necessary;
- Review of quarterly financial reports;
- Election of a School Board Chairperson annually and other Officers as necessary;
- Approval of charter amendments;
- Approval of annual fiscal and performance audits;
- Approval of personnel discipline (suspensions or dismissals) as needed;
- Appoint an administrative panel to act as a hearing body and take action on recommended student expulsions; and
- Hiring, supervision, evaluation, and if necessary, termination of the School Principal.
- Creation of external or sub-committees as needed including but not limited to a hiring committee, a compensation committee, and an audit committee.

The School Board may initiate and carry on any program, activity or may otherwise act in any manner which is not in conflict with or inconsistent with, or preempted by, any law and which are not in conflict with the purposes for which schools are established.

All meetings of the School Board shall be held in accordance with the Brown Act.

Unless necessity dictates otherwise, a School Board member shall not vote or participate in a discussion relating to a matter in which he/she has a direct personal financial interest (exceeding \$100). The Board shall adopt policies and procedures regarding self dealing and conflicts of interest.

The School Board may execute any powers delegated by law to it and shall discharge any duty imposed by law upon it and may delegate to an employee of the School any of those duties. The School Board, however, retains ultimate responsibility over the performance of those powers or duties so delegated. Such delegation will:

- Be in writing;
- Specify the entity designated;
- Describe in specific terms the authority of the School Board being delegated, any conditions on the delegated authority or its exercise, and the beginning and ending dates of the delegation; and
- Require an affirmative vote of a majority of School Board members.

## **B. SCHOOL PRINCIPAL**

The Principal is to the School Board what the Superintendent is to the District Board of Trustees.

The Principal communicates directly with the School Board, and to the District Board of Trustees through its Superintendent or designee. The School Principal is fully responsible for the administration of the School. These responsibilities may include, but are not limited to:

Coordination of the activities of the various operating bodies of the school.

Attend meetings with the Chief Financial Officer of the District on fiscal oversight issues at least bi-monthly.

Attend District Administrative meetings to be part of the District "Administrative Team" and stay in direct contact with District changes, progress, etc.

Attendance at all School Board meetings, and attendance as necessary at District Board meetings as a charter representative.

Develop School Board meeting agenda in conjunction with the School Board secretary in compliance with the Brown Act.

Compile and/or create supporting materials for the School Board meetings to be made available to the School Board at least one week in advance of each School Board meeting.

Supervise, either directly or through subordinates, all employees of the School.

- Provide assistance and coordination to the Faculty in the development of curriculum.
- Appoint with School Board approval, a Hiring Committee for Faculty hiring that includes School Board, Faculty, and parent representation.
- Participate on Hiring Committee and present written recommendations to the School Board for final approval.
- Draft interview questions to be used by the Hiring Committees in conjunction with Hiring Committee members.
- Provide timely performance evaluations of all School employees at least annually.
- Upon the direction of the School Board, termination of School employees in accordance with established policies and procedures.
- Development and administration of the budget in accordance with generally accepted accounting principles.
- Make budget line item revisions when necessary and report changes regularly to the School Board.
- Oversee parent/student/teacher relations.
- Attendance at IEP meetings when necessary.
- Student disciplinary matters.
- Proposal of policies for adoption by the School Board
- Provide comments and recommendations regarding policies presented by others to the school Board.
- Establishment of procedures designed to carry out School Board policies.
- Create and appoint committees to assist in the execution of certain planning and administrative functions (known as "Director appointed committees").
- Site safety.
- Fostering an amicable relationship between District and School and facilitate a sharing of resources between both entities.
- Establish a Communication Model to facilitate communication among all the groups

within the School, between the School and the District, and between the School and the community at large.

Scheduling.

Graduations.

Communicating with School legal counsel.

Staying abreast of School laws and legislation.

Coordinating the communications of the recommendations of any Director appointed committees to the attention of the Board.

Manage communications between District and School Board.

Develop the School annual performance audit.

Present performance audit to the School Board and upon review of the School Board present audit to the District Board of Trustees and the District Superintendent.

Approval of all purchase orders, pay warrants and requisitions, and upon approval forward on for processing.

Presentation of a quarterly financial report to the School Board.

Participation in the dispute resolution procedure and the complaint procedure when necessary.

Plan and coordinate student orientation.

Coordinate the administration of Standardized Testing.

Grant writing.

Communicate employment vacancies to the public.

Assist in development and implementation of curriculum.

Establish and execute enrollment procedures.

Facilitate open house events.

The above duties may be delegated or contracted as approved by the School Board to a business administrator of the School or other employee, a parent volunteer (only in accordance with student and teacher confidentiality rights) or to the District or a third-party provider.

### C. FACULTY

The Faculty, as provider of the day-to-day teaching and guidance to the children, is the primary resource of the school. All Faculty report to the Principal. The Principal shall provide ongoing feedback during the course of the year to foster continuous improvement along with periodic evaluations as appropriate.

The Faculty will be responsible for making recommendations to the Principal and assisting the Principal in the creation of and the implementation of the curriculum and ensuring that the curriculum reflects the mission of the School as well as recommendations regarding the purchase of any supporting curricular materials, programs or devices. Such recommendations include but are not limited to:

- selection of textbooks
- selection of computer programs
- selection of learning programs
- selection and planning of field trips
- selection and administration of assignments, projects and exams
- selection of and implementation of the grading rubric
- student counseling as appropriate
- initiation and implementation of new curriculum or classes
- selection of extra-curricular activities
- participation in the School dispute resolution procedure and complaint procedure when necessary

Participation in an advisory capacity to the School Board shall not disqualify any employee of the School from the full exercise of any right or the entitlement to any benefit afforded employees of the school.

**D. CHAIRPERSON OF THE BOARD**

The Chairperson of the School Board shall conduct all School Board meetings. The School Board shall elect the chair during its first regular meeting following the seating of newly elected members. In the absence of the Chair, a School Board designee shall conduct meetings. The Chairperson shall develop the meeting agenda in conjunction with the Principal. The Chair shall participate in the dispute resolution procedure and the complaint procedure as necessary. The Chair shall also direct the Board's annual evaluation of the Principal.

**E. FACULTY CHAIR**

The Faculty Chair, or designee, will be responsible for attending all School Board meetings and all Faculty meetings. The Faculty Chair shall be elected by the faculty at the first staff meeting at the beginning of the school year. The Faculty Chair will be responsible for communicating the recommendations of the faculty to the Principal and assisting the Principal with curriculum implementation. The Faculty Chair will participate in the dispute resolution procedure and the complaint procedure as necessary and will be the faculty representative on the hiring committee, or may appoint a designee. The Faculty Chair may act in an administrative capacity in the absence of the Principal unless otherwise decided by the board for reason of:

- Illness;
- Administrative duties;
- Vacation;
- Temporary vacancy in position;
- Emergency on site when the Principal is not on site.

**F. HIRING COMMITTEE**

All full-time and part-time prospective employees of the School will be screened and interviewed by a hiring committee which will make a recommendation to the Principal for a final decision and ratification by the School Board.

The hiring committee shall consist of the Principal, and other member appointed by the School Board.

The Principal shall be responsible for drafting interview questions.

A vacant position for the Principal will be filled by the School Board upon a prior recommendation of a committee of the School Board. The Committee shall consist of a parent representative appointed by the School Board, a member of the School Board, and the Faculty Chair.

All hiring is subject to each employee submitting fingerprints and receiving a criminal background summary and clearance as described in Education Code Section 44237.

**G. PARENT PARTICIPATION**

All parents and staff shall be members of a Parent/Teacher Council ("PTC") which shall present a forum for facilitating communication among parents and participation in school activities, similar in function to a typical Parent Teacher Association.

The PTC shall be governed by a three member governing body. The initial members of the governing body shall be appointed by the School Board. Subsequent members shall be elected to the governing body of the PTC. The PTC operate in accordance with bylaws developed by the PTC.

The PTC is a means by which parents contribute time and skills toward the betterment of the children and the School. The PTC shall maintain a list of active committees. By their nature, the Committees will work with various bodies within the School, providing support activities as appropriate.

To encourage additional parent involvement, the School shall at a minimum also do the following:

- . develop an ongoing list of extensive participation opportunities for parents;
- . offer extra-curricular activities for both student and parent participation.

**H. CONFLICTS CODE**

The School shall adopt and shall abide by a Conflicts Code.

**I. BROWN ACT**

All meetings of the School Board shall be noticed and held in accordance with the Brown Act.

## V. EMPLOYEE QUALIFICATIONS

*The qualifications to be met by individuals to be employed by the school.  
- California Education Code Section 47605 (b) (5) (E)*

### TEACHERS

The charter school shall comply with Education Code Section 47605(l) which states in pertinent part:

“Teachers in charter schools shall be required to hold a Commission on Teacher Credentialing certificate, permit or other document equivalent to that which a teacher in other public schools would be required to hold. These documents shall be maintained on file at the charter school and shall be subject to periodic inspection by the chartering authority. It is the intent of the Legislature that charter schools be given flexibility with regard to non-core, non-college preparatory courses.”

Teachers are expected to meet both individual and School standards for effective teaching. Some of the Elementary responsibilities include evaluating student progress, communicating with parents and supervising playground time. To be considered for this position, a teacher must meet the following minimum requirements:

1. Skills/knowledge-

Must maintain minimum educational and experience requirements necessary to meet certification or credential requirements for an elementary or grade school teacher as amended or implemented from time to time.

2. Experience/education-

Prior teaching experience preferred but not required. Education or substituted experience acceptable to the State of California which meets the certification or credential standards established for elementary or grade school teachers.

3. Fingerprint and medical health clearance is mandated.

### PRINCIPAL

The school Principal supervises the campus teachers, and non-instructional staff. Some of the Principal's responsibilities include training, hiring, admissions and marketing as previously outlined in this Charter. To be considered for this position, an individual must have:

1. High school graduate or GED
2. A BA degree with at least one year of teaching.
3. An administrative credential.



4. Fingerprint and medical health clearance is mandated.

### **NON-INSTRUCTIONAL STAFF**

All non-instructional staff must possess experience and expertise appropriate for their position. Fingerprint and medical health clearance is mandated.

### **ALL STAFF**

Employees are expected to conduct themselves at all times in a manner consistent with the highest standards of personal character and professionalism, with children, parents, prospective parents, co-workers, and the community.

Attitude is the most important facet of each employee's presentation of the School to the public. Employees must be courteous, tactful, and pleasant at all times, treating the most unpleasant people as well as they treat the most pleasant ones.

### **VOLUNTEERS**

The School welcomes parent or community volunteers. Volunteers shall be fingerprinted and receive a background clearance before volunteering on campus, unless the volunteer will be under the direct supervision of a credentialed employee at all times or unless the volunteer will not come into any contact, even limited with students.

## VI. HEALTH AND SAFETY PROCEDURES

*The procedures that the school will follow to ensure the health and safety of pupils and staff. These procedures shall include the requirement that each employee of the school furnish the school record summary as described in Section 44237.*

*- California Education Code Section 47605 (b) (5) (F)*

To the extent the School does not have a specific health and safety policy in place, the health and safety policies of the District shall control and be applicable to the students and staff of the Bullis-Purissima Elementary School, until such time as the School implements its own. These policies include the requirement that each employee be fingerprinted and furnish the School with a criminal record summary as described in Section 44237, and the requirement that all employees provide proof of a clear tuberculosis test within the last four years. Students must provide proof of immunizations and health screening.

These policies shall be incorporated as appropriate into a student and staff handbooks and shall be reviewed on an ongoing basis by a committee of the School Board. Any additional health and safety policies and procedures along with any revisions of existing policies and procedures shall be submitted annually to the District as part of the annual programmatic audit of the School.

**VII. MEANS TO ACHIEVE RACIAL/ETHNIC BALANCE  
REFLECTIVE OF THE DISTRICT**

*The means by which the school will achieve racial and ethnic balance among its pupils that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted.*

*-- California Education Code Section 47605 (b) (5) (C)*

The School shall implement a student recruitment strategy that includes, but is not necessarily limited to, the following elements or strategies to attempt to achieve a racial and ethnic balance among students that is reflective of the general population residing within the territorial jurisdiction of the District:

An enrollment process that is scheduled and adopted to include a timeline that allows for a broad-based recruiting and application process.

The development of promotional and informational material that appeals to all of the various racial and ethnic groups represented in the District.

The distribution of promotional and informational materials to a broad variety of community groups and agencies that serve the various racial, ethnic, and interest groups represented in the District.

Outreach meetings.

## VIII. ADMISSION REQUIREMENTS

*Admission requirements, if applicable.*  
*- California Education Code Section 47605(b) (5) (H)*

### ENROLLMENT POLICY

All students who reside in the State of California may attend the School subject only to capacity at each grade level.

### APPLICATION PROCESS

The application process is comprised of the following:

- Completion of a student enrollment form
- Proof of immunization and physical exam
- Proof of withdrawal from previous school
- Home language survey
- Provision of a copy of official birth certificate
- Signed cumulative record request
- Completion of emergency medical card

With the exception of the initial year, applications will be accepted during an open enrollment period from March 1 to May 1 for enrollment in the following school year. For the initial year, applications will be accepted during an open enrollment period that is held for the first thirty (30) days after charter approval. Following the open enrollment period, each year applications shall be counted to determine whether any grade level at any site has received more applications than availability. In this event, the School will hold a public random drawing to determine enrollment for the impacted grade level, with the exception of existing students who are guaranteed enrollment in the following school year.

Enrollment preferences in the case of a public random drawing shall be allowed as follows:

1. Children of Original Founders of School, as defined as those individuals who have documented 40 or more volunteer hours in development of the School;
2. Children of School employees;
3. Children who reside in Los Altos Hills and/or in the former Bullis-Purissima Elementary School boundaries;
4. Siblings of current and/or former Bullis Charter School students and siblings of former Bullis Purissima School students;
5. District residents;
6. Santa Clara County residents;

7. All others.

A waitlist will be established in each numbered priority group. Applicants who were waitlisted in the previous year will be given preference within their numbered priority group in a subsequent year's lottery.

Students who are currently under an expulsion from a public school may not enroll in the School until the expulsion term has been documented as completed and the Student completes the rehabilitation plan created by the former school or as created by the School on behalf of the student.

At the conclusion of the lottery, all students who were not granted admission due to capacity shall be given the option to put their name on a wait list according to their draw in the lottery. This waitlist will allow students the option of enrollment in the case of an opening during the school year.

In no circumstance will a wait list carry over to the following school year.

## IX. FINANCIAL AND PROGRAMMATIC AUDIT

*The manner in which an annual, independent, financial audit shall be conducted, which shall employ generally accepted accounting principles, and the manner in which audit exceptions and deficiencies shall be resolved to the satisfaction of the chartering authority.*

*- California Education Code Section 47605 (b) (5) (I)*

### FISCAL AUDIT

The School will facilitate an annual independent audit of the School's financial affairs.

The audit will verify the accuracy of the School's financial statements, attendance and enrollment accounting practices, and review the school's internal controls. The audit will be conducted in accordance with generally accepted accounting principles applicable to the School. To the extent required under applicable federal law, the audit scope will be expanded to include items and processes specified in any applicable Office of Management and Budget Circulars. It is anticipated that the annual audit will be completed four months of the close of the fiscal year and that a copy of the auditor's findings will be forwarded to the chief financial officer of the District, and to the CDE by December 15<sup>th</sup> each year. The School's Principal along with an audit committee will review any audit exceptions or deficiencies and report to the School's Board with recommendations on how to resolve them. The School Board will submit a report to the District describing how the exceptions and deficiencies have been or will be resolved. Any disputes regarding the resolution of audit exceptions and deficiencies will be referred to the dispute resolution process contained in Section XIV of this Charter.

### PROGRAMMATIC AUDIT

The School will compile and provide to the District an annual performance report. This report will, at a minimum, include the following data:

Summary data showing student progress toward the goals and outcomes specified in Section II from assessment instruments and techniques listed in Section III.

An analysis of whether student performance is meeting the goals specified in Section II. This data will be displayed on both a School-wide basis and disaggregated by major racial and ethnic categories to the extent feasible without compromising student confidentiality.

A summary of major decisions and policies established by the School Board during the year.

Data on the level of parent involvement in the School's governance (and other aspects of the school, if applicable) and summary data from an annual parent and student satisfaction survey.

Data regarding the number of staff working at the school and their qualifications.

A copy of the school's health and safety policies and/or a summary of any major changes to those policies during the year.

Information demonstrating whether the School implemented the means listed in charter Element VII. to achieve a racially and ethnically balanced student population.

An overview of the School's admissions practices during the year and data regarding the numbers of students enrolled, the number on waiting lists, and the numbers of students expelled and/or suspended.

Analyses of the effectiveness of the School's internal and external dispute mechanisms and data on the number and resolution of disputes and complaints.

Other information regarding the educational program and the administrative, legal, and governance operations of the School relative to compliance with the terms of the charter generally.

The School and District will jointly develop the content, evaluation criteria, timelines, and process for the annual performance report.

The School and District will also jointly develop an annual site visitation process and protocol to enable the grantor to gather information needed to confirm the school's performance and compliance with the terms of this charter.

## X. PUPIL SUSPENSION AND EXPULSION

*The procedures by which pupils can be suspended or expelled.  
- California Education Code Section 47605 (b) (5) (J)*

This Pupil Suspension and Expulsion Policy has been established in order to promote learning and protect the safety and well-being of all students at the School. When the Policy is violated, it may be necessary to suspend or expel a student from regular classroom instruction.

School staff shall enforce disciplinary rules and procedures fairly and consistently amongst all students. This Policy and its Procedures will be printed and distributed as part of the Student Handbook and will clearly describe discipline expectations.

Discipline includes but is not limited to advising and counseling students, conferring with parents/guardians, detention during and after school hours, the use of alternative educational environments, suspension and expulsion.

Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of, or willfully causing the infliction of, physical pain on a student. For purposes of the Policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent damage to school property.

The Principal shall ensure that students and their parents/guardians are notified in writing upon enrollment of all discipline policies and procedures. The notice shall state that this Policy and Administrative Procedures are available on request at the Principal's office.

Suspended or expelled students shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension or expulsion.

A student identified as an individual with disabilities or for whom the School has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities in Education Act ("IDEA") or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 (Section 504) is subject to the same grounds for suspension and expulsion and is accorded the same due process procedures applicable to regular education students except when federal and state law mandates additional or different procedures. The School will follow Section 504 of the Rehabilitation Act, Individuals with Disabilities in Education Act (IDEA), the Americans with Disabilities Act (ADA) of 1990 and all federal and state laws when imposing any form of discipline on a student identified as an individual with disabilities or for whom the School has a basis of knowledge of a suspected disability or who is otherwise qualified for such services or protections in according due process to such students.



A. Definitions (as used in this policy)

1. "Board" means governing body of the School.
2. "Expulsion" means disenrollment from the School.
3. "School day" means a day upon which the School is in session or weekdays during the summer recess.
4. "Suspension" means removal of a pupil from ongoing instruction for adjustment purposes. However, "suspension" does not mean the following:
  - a. Reassignment to another education program or class at the School where the pupil will receive continuing instruction for the length of day prescribed by the School Board for pupils of the same grade level.
  - b. Referral to a certificated employee designated by the Principal to advise pupils.
  - c. Removal from the class but without reassignment to another class for the remainder of the class period without sending the pupil to the Principal or designee.
5. "Pupil" includes a pupil's parent or guardian or legal counsel or other representative.
6. "School" means the School.

B. Grounds for Suspension and Expulsion of Students

A student may be suspended or expelled for prohibited misconduct if the act is related to school activity or school attendance occurring at the School or at any other school or a School sponsored event at any time including but not limited to: a) while on school grounds; b) while going to or coming from school; c) during the lunch period, whether on or off the school campus; d) during, going to, or coming from a school-sponsored activity.

C. Enumerated Offenses

Students may be suspended or expelled for any of the following acts when it is determined the pupil:

1. Caused, attempted to cause, or threatened to cause physical injury to another person or willfully used force or violence upon the person of another, except in self-defense.
2. Possessed, sold, or otherwise furnished any firearm, knife, explosive, or other dangerous object unless, in the case of possession of any object of this type, the

student had obtained written permission to possess the item from a certificated school employee, with the Principal/Administrator or designee's concurrence.

3. Unlawfully possessed, used, sold or otherwise furnished, or was under the influence of, any controlled substance as defined in Health and Safety Code 11053-11058, alcoholic beverage, or intoxicant of any kind.
4. Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code 11053-11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.
5. Committed or attempted to commit robbery or extortion.
6. Caused or attempted to cause damage to school property or private property.
7. Stole or attempted to steal school property or private property.
8. Possessed or used tobacco or any products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel.
9. Committed an obscene act or engaged in habitual profanity or vulgarity.
10. Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code 11014.5
11. Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, other school officials, or other school personnel engaged in the performance of their duties.
12. Knowingly received stolen school property or private property.
13. Possessed an imitation firearm, i.e., a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
14. Committed or attempted to commit a sexual assault as defined in Penal Code 261, 266c, 286, 288, 288a or 289, or committed a sexual battery as defined in Penal Code 243.4.
15. Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.

16. Made terrorist threats against school officials and/or school property.
17. Committed sexual harassment.
18. Caused, attempted to cause, threatened to cause, or participated in an act of hate violence.
19. Intentionally harassed, threatened or intimidated a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder, and invading student rights by creating an intimidating or hostile educational environment.

The above list is not exhaustive and depending upon the offense, a pupil may be suspended or expelled for misconduct not specified above.

Alternatives to suspension or expulsion will first be attempted with students who are truant, tardy, or otherwise absent from assigned school activities.

#### D. Suspension Procedure

Suspensions shall be initiated according to the following procedures.

##### 1) Informal Conference

Suspension shall be preceded, if possible, by an informal conference conducted by the Principal or the Principal's designee with the student and his or her parent and, whenever practicable, the teacher, supervisor or school employee who referred the student to the Principal.

The conference may be omitted if the Principal or designee determines that an emergency situation exists. An "emergency situation" involves a clear and present danger to the lives, safety or health of students or school personnel. If a student is suspended without this conference, both the parent/guardian and student shall be notified of the student's right to return to school for the purpose of a conference.

At the conference, the pupil shall be informed of the reason for the disciplinary action and the evidence against him or her and shall be given the opportunity to present his or her version and evidence in his or her defense.

This conference shall be held within two school days, unless the pupil waives this right or is physically unable to attend for any reason, including, but not limited to incarceration or hospitalization.

No penalties may be imposed on a pupil for failure of the pupil's parent or guardian to attend a conference with school officials. Reinstatement of the suspended pupil shall not be contingent upon attendance by the pupil's parent or guardian at the conference.

2) Notice to Parents/Guardians

At the time of the suspension, a School employee shall make a reasonable effort to contact the parent/guardian by telephone or in person. Whenever a student is suspended, the parent/guardian shall be notified in writing of the suspension. This notice shall state the specific offense committed by the student. In addition, the notice may also state the date and time when the student may return to school. If school officials wish to ask the parent/guardian to confer regarding matters pertinent to the suspension, the notice may request that the parent/guardian respond to such requests without delay.

3) Suspension Time Limits/Recommendation for Expulsion

Suspensions, when not including a recommendation for expulsion shall not exceed five (5) consecutive school days per suspension.

Upon a recommendation of expulsion by the Principal, the pupil and the pupil's guardian or representative will be invited to a conference to determine if the suspension for the pupil should be extended pending an expulsion hearing. This determination will be made by the Principal upon either of the following determinations: 1) the pupil's presence will be disruptive to the education process; or 2) the pupil poses a threat or danger to others. Upon either determination, the pupil's suspension will be extended pending the results of an expulsion hearing.

E. Authority to Expel

A student may be expelled either by the School Board following a hearing before it or by the School Board upon the recommendation of an Administrative Panel to be assigned by the School Board as needed. The Panel should consist of at least three members. The Administrative Panel may recommend expulsion of any student found to have committed an expellable offense.

F. Expulsion Procedures

Students recommended for expulsion are entitled to a hearing to determine whether the student should be expelled. Unless postponed for good cause, the hearing shall be held within thirty (30) school days after the Principal or designee determines that the Pupil has committed an expellable offense.

The expulsion hearing will be presided over by the School Board President Chair or the chair of the Administrative Panel. In the event an administrative panel hears the case, it will make a recommendation to the Board for a final decision whether to expel. The hearing shall be held in closed session unless the pupil makes a written request for a public hearing three (3) days prior to the hearing.

Written notice of the hearing shall be forwarded to the student and the student's parent/guardian at least ten (10) calendar days before the date of the hearing. Upon mailing the notice, it shall be deemed served upon the pupil. The notice shall include:

- 1) The date and place of the expulsion hearing;
- 2) A statement of the specific facts, charges and offenses upon which the proposed expulsion is based;
- 3) A copy of the School's disciplinary rules which relate to the alleged violation;
- 4) Notification of the student's or parent/guardian's obligation to provide information about the student's status at the school to any other school district or school to which the student seeks enrollment;
- 5) The opportunity for the student or the student's parent/guardian to appear in person or to employ and be represented by counsel or an advocate;
- 6) The right to inspect and obtain copies of all documents to be used at the hearing;
- 7) The opportunity to confront and question all witnesses who testify at the hearing;
- 8) The opportunity to question all evidence presented and to present oral and documentary evidence on the student's behalf including witnesses.

#### G. Record of Hearing

A record of the hearing shall be made and may be maintained by any means, including electronic recording, as long as a reasonably accurate and complete written transcription of the proceedings can be made.

#### H. Presentation of Evidence

While technical rules of evidence do not apply to expulsion hearings, evidence may be admitted and used as proof only if it is the kind of evidence on which reasonable persons can rely in the conduct of serious affairs. A recommendation by the Administrative Panel to expel must be supported by substantial evidence that the student committed an expellable offense.

Findings of fact shall be based solely on the evidence at the hearing. While hearsay evidence is admissible, no decision to expel shall be based solely on hearsay, and sworn declarations may be admitted as testimony from witnesses of whom the School Board, Panel or designee determines that disclosure of their identity or testimony at the hearing may subject them to an unreasonable risk of physical or psychological harm.

If, due to a written request by the expelled pupil, the hearing is held at a public meeting, and the charge is committing or attempting to commit a sexual assault or committing a sexual battery as defined in Education Code Section 48900, a complaining witness shall have the right to have his or her testimony heard in a session closed to the public.

The decision of the Administrative Panel shall be in the form of a written recommendation to the School Board who will make a final determination regarding the expulsion. The final decision by the School Board shall be made within ten (10) school days following the conclusion of the hearing.

#### I. Written Notice to Expel

The Principal or designee following a decision of the School Board to expel shall send written notice of the decision to expel, including the School Board's findings of fact, to the student or parent/guardian. This notice shall include the following:

- 1) Notice of the specific offense committed by the student.
- 2) Notice of the right to appeal the expulsion to the County Board of Education or if the County is unwilling to hear such appeals, an appellate administrative panel composed of retired or current school administrators or teachers who are not related to the School to hear expulsion appeals but who will follow the expulsion appeal procedures outlined in Education Code Sections 48921-48924.
- 3) Notice of the student's or parent/guardian's obligation to inform any new district in which the student seeks to enroll of the student's status with the School.

The Principal or designee shall send written notice of the decision to expel to the Student's District of residence, the Chartering District and the County Office of Education.

This notice shall include the following:

- a) The student's name
- b) The specific expellable offense committed by the student.

J. Disciplinary Records

The School shall maintain records of all student suspensions and expulsions at the School. Such records shall be made available for the District's review upon request.

K. Expelled Pupils/Alternative Education

Pupils who are expelled shall be responsible for seeking alternative education programs including but not limited to programs within the County or their school district of residence.

L. Rehabilitation Plans

Students who are expelled from the School shall be given a rehabilitation plan upon expulsion as developed by the School Board at the time of the expulsion order, which may include, but is not limited to, periodic review as well as assessment at the time of review for readmission. The rehabilitation plan should include a date not later than one year from the date of expulsion when the pupil may reapply to the School for readmission.

M. Readmission

The decision to readmit a pupil or to admit a previously expelled pupil from another school district or School shall be in the sole discretion of the School Board following a meeting with the Principal and the pupil and guardian or representative, to determine whether the pupil has successfully completed the rehabilitation plan and to determine whether the pupil poses a threat to others or will be disruptive to the school environment. The Principal shall make a recommendation to the School Board following the meeting regarding his or her determination. The pupil's readmission is also contingent upon the School's capacity at the time the student seeks readmission.

## **XI. RETIREMENT SYSTEM**

*The manner by which staff members of the Schools will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, or federal social security.*  
*- California Education code Section 47605 (b) (5) (K)*

All Staff will participate in the federal social security system. The school retains the option for its School Board to elect to participate in the State Teachers Retirement System and/or Public Employees Retirement System and coordinate such participation, as appropriate, with the social security system or other reciprocal systems in the future, should it find that participation enables the school to attract and retain a higher quality staff.

Additionally, the School Board may consider offering a 403(b) or alternative or supplemental retirement programs. If applicable, the District shall create any reports required by STRS or PERS if applicable at a later date for School employees and shall charge the School for its actual costs of providing this service pursuant to Education Code section 47611.3. The School shall inform all applicants for positions within the School of the retirement system options for employees of the School.

## **SALARY AND BENEFITS**

All employees of the School shall receive salary and benefits which are at a minimum equivalent to the salary and benefits of the equivalent employees of the District as may be negotiated by the District and the collective bargaining units from time to time.



## XII. ATTENDANCE ALTERNATIVES

*The public school attendance alternatives for pupils residing within the school district who choose not to attend Schools.*

*- California Education code Section 47605 (b) (5) (L)*

Students who opt not to attend the School may attend other schools within their school district of residence, another charter school, or pursue an inter-district transfer in accordance with existing enrollment and transfer policies of their district or county of residence. Enrollment in the School does not generate any entitlement to any other School of the District unless such student is a District resident or is otherwise approved for District admission.

### **XIII. DESCRIPTION OF EMPLOYEE RIGHTS**

*A description of the rights of any employee of the school district upon leaving the employment of the school district to work in a School and of any rights of return to the school district after employment at a School.*

*- California Education Code Section 47605 (b) (5) (M)*

All staff members of the School shall be considered employees of the School during their employment within the School, with the exception of staff members who are specifically hired as independent contractors. To the extent any employee of the District leaves the District to work at the School, the employee shall have the right of return, employment, or gain of seniority at the District as long as the employee requests and is granted a leave of absence by the District Board of Trustees pursuant to any applicable collective bargaining agreement.

#### **XIV. DISPUTE RESOLUTION PROCESS, OVERSIGHT REPORTING, AND RENEWAL**

*The procedures to be followed by the School and the entity granting the charter to resolve disputes relating to provisions of the charter.*

*- California Education Code Section 47605 (b) (5) (N)*

#### **DISPUTES BETWEEN THE DISTRICT AND THE SCHOOL**

In the event of a dispute between the School and the District, the staff and Board members of the School and District agree to first frame the issue in written format and refer the issue to the Superintendent of the District and Principal of the School. In the event that the District believes that the dispute relates to an issue that could lead to revocation of the charter, this shall be specifically noted in the written dispute statement.

The Principal and Superintendent shall informally meet and confer in a timely fashion to attempt to resolve the dispute. In the event that this informal meeting fails to resolve the dispute, both parties shall identify two School Board/District Board members from their respective boards who shall jointly meet with the Superintendent of the District and Principal of the School and attempt to resolve the dispute. If this joint meeting fails to resolve the dispute, the Superintendent and Principal shall meet to jointly identify a neutral, third party arbitrator. The format of the arbitration session shall be developed jointly by the Superintendent and Principal, and shall incorporate informal rules of evidence and procedure unless both parties agree otherwise. The findings or recommendations of the arbitrator shall be non-binding, unless the governing boards of the School and District jointly agree to bind themselves. Each Party shall bear their own costs of arbitration. Joint costs of arbitration (such as the arbitrator) shall be split equally between both Parties.

If the District believes it has cause to revoke this charter pursuant to Education Code Section 47607, the District Board agrees to notify the Board of the School in writing, noting the specific reasons for which the charter may be revoked, and grant the School reasonable time to respond to the notice and take appropriate corrective action unless the District Board determines, in writing, that an imminent threat to pupil health and safety exists.

#### **INTERNAL DISPUTES**

Disputes arising from within the School, including all disputes among and between students, staff, parents, volunteers, advisors, partner organizations, and School Board members, shall be resolved pursuant to policies and processes developed by the School. The District shall not intervene in any such internal disputes without the consent of the School Board and shall refer any complaints or reports regarding such disputes to the Board or the Principal of the School for resolution in keeping with the School's policies. The District agrees not to intervene or become involved in the dispute unless the dispute has given the District reasonable cause to believe that a violation of this charter or related laws or agreements has occurred, or unless the School Board has requested the District to intervene in the dispute.

Disputes shall first be brought informally to the Principal of the School for resolution.

The Principal shall track all disputes in writing.

The Principal shall facilitate discussion and resolution between all parties involved in the dispute.

If the resolution is not resolved by discussion facilitated by the Principal, the matter may be brought before the School Board. The Principal shall provide a written summary of the dispute and all attempts at resolution for the School Board.

The decision of the School Board shall be final.

## XV. LABOR RELATIONS

*A declaration whether or not the School shall be deemed the exclusive public school employer of the employees of the School for the purposes of the Educational Employment Relations Act.  
- California Education Code Section 47605(b) (5) (O)*

The School shall be deemed the exclusive public school employer of the employees of the School for the purposes of the Educational Employment Relations Act.

## XVI. AGREED PROCESS ON CLOSURE OF SCHOOL

*A description of the procedures to be used if the charter school closes. The procedures shall ensure a final audit of the school to determine the disposition of all assets and liabilities of the School, including plans for disposing of any net assets and for the maintenance and transfer of pupil records.  
(Education Code Section 47605(b)(5)(P))*

The following procedures shall apply in the event the School closes. The following procedures apply regardless of the reason for closure.

Closure of the School will be documented by official action of the School Board. The action will identify the reason for closure.

The School Board will promptly notify the District of the closure and of the effective date of the closure.

The School Board will ensure notification to the parents and students of the School of the closure and to provide information to assist parents and students in locating suitable alternative programs. This notice will be provided promptly following the School Board's decision to close the School.

As applicable, the School will provide parents, students and/or the district with all appropriate student records and will otherwise assist students in transferring to their next school. All transfers of student records will be made in compliance with the Family Educational Rights and Privacy Act ("FERPA"), 20 U.S.C. § 1232g.

As soon as reasonably practical, the School will prepare final financial records. The School will also have an independent audit completed as soon as reasonably practical, which period is generally no more than six months after closure. The School will pay for the final audit. The audit will be prepared by a qualified Certified Public Accountant selected by the School and will be provided to the District promptly upon its completion.

On closure of the School, all assets of the School, including but not limited to all leaseholds, personal property, intellectual property and all ADA apportionments and other revenues generated by students attending the School, remain the sole property of the School, and shall be distributed in accordance with the Articles of Incorporation upon the dissolution of the nonprofit public benefit corporation. On closure, the School shall remain solely responsible for all liabilities arising from the operation of the School.

As the School is organized as a nonprofit public benefit corporation, the School Board will follow the procedures set forth in the California Corporations Code for the dissolution of a nonprofit public benefit corporation and file all necessary filings with the appropriate state and federal agencies.

## **XVII. MISCELLANEOUS CLAUSES**

### **TERM**

The term of this charter shall begin on the day of District Board approval and expire five years thereafter at the end of the school year.

### **AMENDMENTS**

The School Board may make any amendments to this charter. Material revisions and amendments shall be made pursuant to the standards, criteria, and timelines in Education Code Section 47605.

### **RENEWAL**

The School may submit its charter for renewal to the District any time but in no case later than April 1<sup>st</sup> of the last year.

Renewals shall be governed by the standards and criteria in Education Code Section 47605. Any renewal shall be for a five (5) year term.

### **OVERSIGHT AND ADMINISTRATIVE SERVICES**

The District and School shall operate in accordance with a mutually agreeable Memorandum of Understanding that outlines further details of the legal and fiscal relationship between the District and the School. The Memorandum of Understanding shall include, but not be limited to, the following:

Authority of the School to contract with third parties;

Direct funding of the School;

Services to be purchased by the School from the District if available, and the fee schedule for such services;

Special education services and funding formulas;

Hold harmless/indemnification of the District by the School;

Fiscal reporting requirements to the state, either independently or through the District;

Oversight Requirements of the District

# **SIGNATURES**



HAND DELIVERY

July 2, 2003

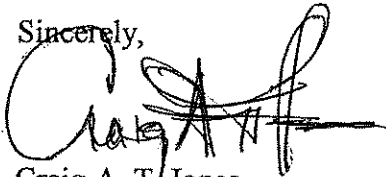
Porter Sexton, Ph.D.  
Executive Director, Center for Educational Planning  
Santa Clara County Office of Education  
1290 Ridder Park Drive  
San Jose, CA 95131

In this letter please find the following

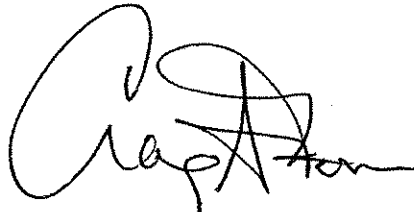
"I, Craig Jones, lead petitioner for the Bullis Charter School, hereby affirms, under penalty of perjury of law, that to my knowledge, each petitioner saw the statement on the first page of the petition and intended to sign the petition indicating a meaningful interest in having his or her child, or ward, attend the school."

2) We have requested through our counsel Lisa Corr of Spector, Middleton that a copy of the vote of the Los Altos School District Board of Trustees and the signature of its President be sent to you from the District.

Sincerely,



Craig A. T. Jones



Lead Petitioner and Chairman of the Board of Bullis Charter School

We the undersigned believe that the attached Charter merits consideration and hereby petition the governing board of the Los Altos School District to grant approval of the charter pursuant to Education Code Section 47605 to enable the creation of the Bullis Charter School. The Bullis Charter School agrees to operate the School pursuant to the terms of The Charter Schools Act and the provisions of the School's charter. The petitioners listed below certify that they are parents or guardians who are meaningfully interested in having their children or wards attend the charter school.

By the Lead Petitioner:

Craig Jones Name Craig Jones Signature 2/27/03 Date

The petitioners recognize Craig Jones as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the School District governing board.

By the Petitioners:

<u>Gene Conner</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>Margaret Clark</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>Nora C. Cheung</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>Shanthe Madureddi</u> Name	<u>[Signature]</u> Signature	<u>[Date]</u> Date	<u>[Number]</u> Number of School Age Children
<u>Doreen Andriacchi</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>Kristi Moore</u> Name	<u>[Signature]</u> Signature	<u>2-27-03</u> Date	<u>1</u> Number of School Age Children
<u>Cherry Jia</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children

Myla La Poll  
Name

Myla La Poll  
Signature

2/27/03  
Date

5  
Number of School  
Age Children

REBECCA CONNER  
Name

R. Conner  
Signature

2/27/03  
Date

1  
Number of School  
Age Children

Shavene Chumy  
Name

Shavene Chumy  
Signature

2/27/03  
Date

1  
Number of School  
Age Children

Richard Contreras  
Name

Richard Contreras  
Signature

2/27/03  
Date

2  
Number of School  
Age Children

Shanthy Madireddi  
Name

Shanthy Madireddi  
Signature

2/27/03  
Date

1  
Number of School  
Age Children

SANJAY DESAI  
Name

S. M. Desai  
Signature

2/27/03  
Date

1  
Number of School  
Age Children

Robert Robertson  
Name

Robert Robertson  
Signature

3/2/03  
Date

2  
Number of School  
Age Children

Leslie Storck  
Name

Leslie Storck  
Signature

3-3-03  
Date

2  
Number of School  
Age Children

PO-JEN LIN  
Name

Po-Jen Lin  
Signature

3-10-03  
Date

1  
Number of School  
Age Children

Grace H. Mah  
Name

Grace H. Mah  
Signature

3/10/03  
Date

1  
Number of School  
Age Children

\_\_\_\_\_  
Name

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Signature

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Number of School  
Age Children

\_\_\_\_\_  
Name

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Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Number of School  
Age Children

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**By the Lead Petitioner:**

Craig A. T. Jones  
Name


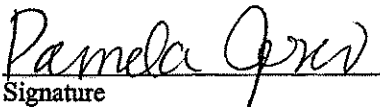

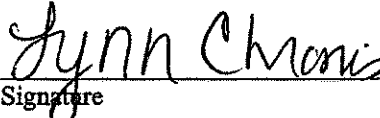

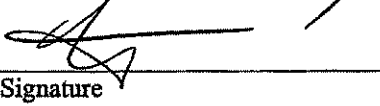
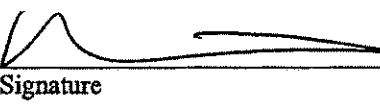
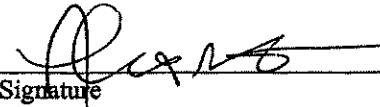

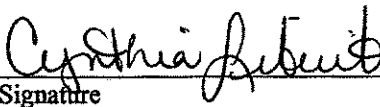
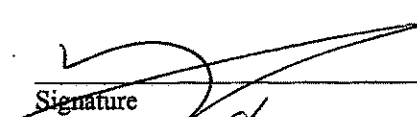

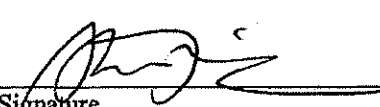
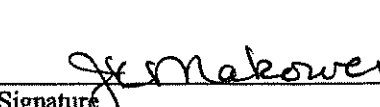
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Signature

2/27/03  
Date



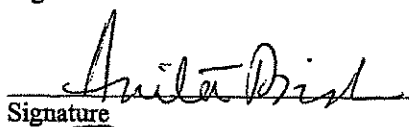
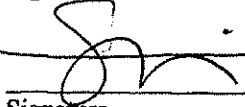
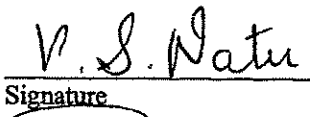
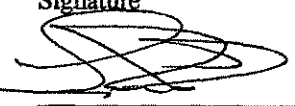

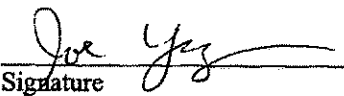

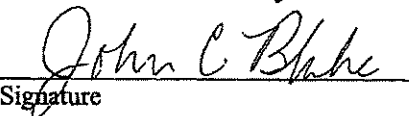
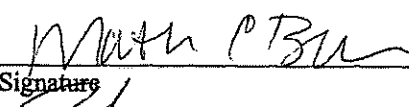
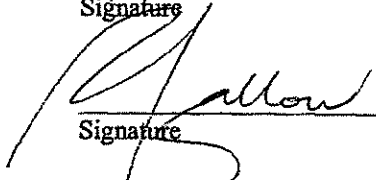
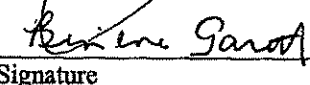
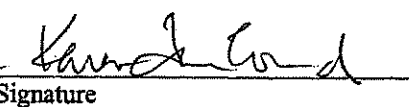
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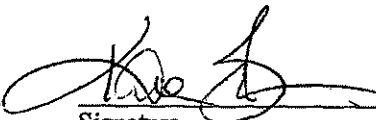
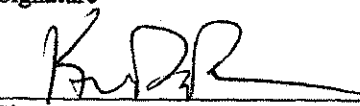

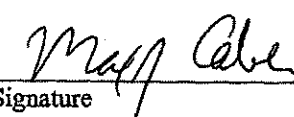
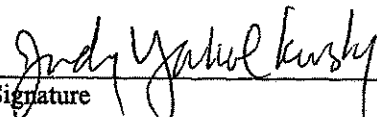
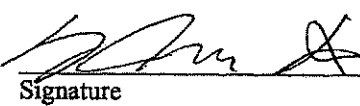
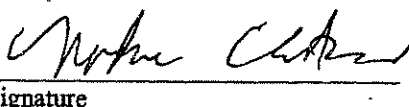
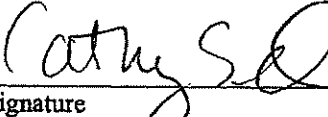
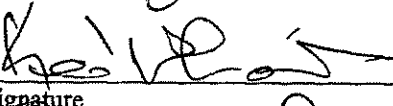


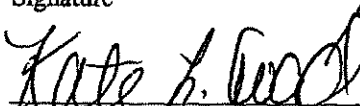
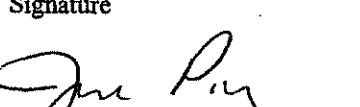
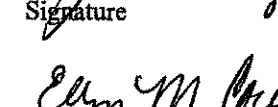

**By the Petitioners:**

<u>Valerie Lauterbach</u> Name	<u>[Signature]</u> Signature	<u>2-27-03</u> Date	<u>1</u> Number of School Age Children
<u>Kristina S. Johnson</u> Name	<u>[Signature]</u> Signature	<u>2-27-03</u> Date	<u>2</u> Number of School Age Children
<u>Stephanie Winner</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>        </u> Number of School Age Children
<u>RICHARD RIDGLEY</u> Name	<u>[Signature]</u> Signature	<u>2-27-03</u> Date	<u>1</u> Number of School Age Children
<u>Christine V Hon</u> Name	<u>[Signature]</u> Signature	<u>2-27-02</u> Date	<u>2</u> Number of School Age Children
<u>Kathy Evans</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>Maren Abrams</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>        </u> Number of School Age Children
<u>[Signature]</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children

Uday Kurkure		2-27-03	1
Name	Signature	Date	Number of School Age Children
Pamela Jones		2-27-03	2
Name	Signature	Date	Number of School Age Children
Lou Dask		2-27-03	1
Name	Signature	Date	Number of School Age Children
Lynn Chronis		2-27-03	1
Name	Signature	Date	Number of School Age Children
David Pefley		2-27-03	2
Name	Signature	Date	Number of School Age Children
Wolfgang Stue		2-27-03	2
Name	Signature	Date	Number of School Age Children
DAVID SANDIN		2-27-03	1
Name	Signature	Date	Number of School Age Children
ALEXANDER NG		2/27/03	2
Name	Signature	Date	Number of School Age Children
Nancy Fowler		2/27/03	1
Name	Signature	Date	Number of School Age Children
Cynthia Libuit		2/27/03	1
Name	Signature	Date	Number of School Age Children
Farzad Dibachi		2/27/03	1
Name	Signature	Date	Number of School Age Children
MARK SOWE		2/27/03	1
Name	Signature	Date	Number of School Age Children
STEVE KIRSCH		2/27/03	2
Name	Signature	Date	Number of School Age Children
Jennifer Makower		2/27/03	2
Name	Signature	Date	Number of School Age Children

<u>PASVORN BOONMARK</u> Name	<u>San Paul.</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>Alka Goel</u> Name	<u>Alka Goel</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>JAISHRI RAMESH</u> Name	<u>Jaishri Ramesh</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>Geralyn Mathews</u> Name	<u>G Mathews</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>Violet Parvaramdelu</u> Name	<u>Violet Parvaramdelu</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>Ida Johnston</u> Name	<u>Ida Johnston</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>Stacey Ahrens</u> Name	<u>Stacey Ahrens</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>Jane Wasson</u> Name	<u>Jane H Wasson</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>Lynn McLeod</u> Name	<u>Lynne McLeod</u> Signature	<u>2/27/03</u> Date	<u>0</u> Number of School Age Children
<u>Terese Blockhus</u> Name	<u>T. Blockhus</u> Signature	<u>2/28/03</u> Date	<u>3</u> Number of School Age Children
<u>Grace Tsang</u> Name	<u>Grace Tsang</u> Signature	<u>2/28/03</u> Date	<u>2</u> Number of School Age Children
<u>SUSAN AYRES</u> Name	<u>Susan Ayres</u> Signature	<u>2/28/03</u> Date	<u>2</u> Number of School Age Children
<u>SHEA HARDEN</u> Name	<u>Shea Harden</u> Signature	<u>3/1/03</u> Date	<u>0</u> Number of School Age Children
<u>Mary Hoagland</u> Name	<u>Mary Hoagland</u> Signature	<u>3/1/03</u> Date	<u>2</u> Number of School Age Children

JULI BIDER		2-1-03	1
BOB MATHEWS		3/1/03	1
ANITA BIST		3/1/03	1
<del>Sharon Nien</del>	<del></del>	<del>3/1/03</del>	<del>0</del>
Vanita Natu		3/1/03	2
TERESA CHAMP		3-1-03	1
ISRAEL RIND		3/1/03	1
SUE VERGER		3-1-03	3
Scott Tilley		3/1/03	2
John Blaha		3/1/03	3
Marta Blau		3-1-03	3
PERCIS FALCON		3-1-03	2
Burienwe Gant		3-1-03	2
Karen Fann-Tansend		3-1-03	1

Karen Burns		4/1/03	4
Name	Signature	Date	Number of School Age Children
Kenns Puzos		3/1/03	1
Name	Signature	Date	Number of School Age Children
Lynn W. Early		3-1-03	2
Name	Signature	Date	Number of School Age Children
Max Caber		3-1-03	2
Name	Signature	Date	Number of School Age Children
Judy Yaholkovsky		3-1-03	2
Name	Signature	Date	Number of School Age Children
Yoko Noda-Dvorak		3-1-03	1
Name	Signature	Date	Number of School Age Children
Nahm Efrade		3-1-03	2
Name	Signature	Date	Number of School Age Children
Cathy Quinlan		3/1/03	2
Name	Signature	Date	Number of School Age Children
Kevin HARRIS		3/1/03	1
Name	Signature	Date	Number of School Age Children
LARRY H. BAIL		1 MAR 2003	2
Name	Signature	Date	Number of School Age Children
KATHERINE		1 Mch 2003	3
Name	Signature	Date	Number of School Age Children
KATE EVAKO		3-1-03	1
Name	Signature	Date	Number of School Age Children
Kate L. Wood		3-1-03	1
Name	Signature	Date	Number of School Age Children
June Piny		3-1-03	2
Name	Signature	Date	Number of School Age Children
Blynn Corey		3-1-03	2
Name	Signature	Date	Number of School Age Children



We the undersigned believe that the attached Charter merits consideration and hereby petition the governing board of the Los Altos School District to grant approval of the charter pursuant to Education Code Section 47605 to enable the creation of the Bullis Charter School. The Bullis Charter School agrees to operate the School pursuant to the terms of The Charter Schools Act and the provisions of the School's charter. The petitioners listed below certify that they are parents or guardians who are meaningfully interested in having their children or wards attend the charter school.

By the Lead Petitioner:

Craig A. T. Jones [Signature] 2/27/03  
Name Signature Date

The petitioners recognize Craig Jones as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the School District governing board.

By the Petitioners:

<u>[Signature]</u> Name	<u>Suzanne B. Schroder</u> Signature	<u>2-27-03</u> Date	<u>2</u> Number of School Age Children
<u>Venkatesh Venkayalapati</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>Kam D. Lynch</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>Alice Chang</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>Brent Beagle</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>CHRIS VARGAS</u> Name	<u>[Signature]</u> Signature	<u>27 Feb 03</u> Date	<u>1</u> Number of School Age Children
<u>Julia Zarcone</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children

Anne Astiz		2/27/03	2
Name	Signature	Date	Number of School Age Children
Vileenu Nagaraj		2-27-03	2
Name	Signature	Date	Number of School Age Children
LISA ORTON		2/27/03	1
Name	Signature	Date	Number of School Age Children
Sean Cox		2/27/03	1
Name	Signature	Date	Number of School Age Children
* Tim Seyfert		2/27/03	0
Name	Signature	Date	Number of School Age Children
MOHAMED POONJA		2/27/03	1
Name	Signature	Date	Number of School Age Children
Melanie H. Taylor		2/27/03	2
Name	Signature	Date	Number of School Age Children
Zaitun Poonja		2/27/03	1
Name	Signature	Date	Number of School Age Children
Fred Faltich		2/27/03	1
Name	Signature	Date	Number of School Age Children
Jim Bernade		2/27/03	1
Name	Signature	Date	Number of School Age Children
Mark Breier		2/27/03	2
Name	Signature	Date	Number of School Age Children
Ronda Breier		2/27/03	2
Name	Signature	Date	Number of School Age Children
Andrea Eyring		2/27/03	2
Name	Signature	Date	Number of School Age Children
Donna M. Mohr		2/27/03	2
Name	Signature	Date	Number of School Age Children

\* Not counted in total

<u>Bill Gibbons</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>DAN LYNCH</u> Name	<u>[Signature]</u> Signature	<u>2/28/03</u> Date	<u>1</u> Number of School Age Children
<u>Nika Monajeri</u> Name	<u>[Signature]</u> Signature	<u>2/28/03</u> Date	<u>1</u> Number of School Age Children
<u>Susan Erzati</u> Name	<u>[Signature]</u> Signature	<u>2/28/03</u> Date	<u>2</u> Number of School Age Children
<u>Kathleen Stanley</u> Name	<u>[Signature]</u> Signature	<u>2/28/03</u> Date	<u>2</u> Number of School Age Children
<u>Simon Gayles</u> Name	<u>[Signature]</u> Signature	<u>2/28/03</u> Date	<u>2</u> Number of School Age Children
<u>Maurice Jeffery</u> Name	<u>[Signature]</u> Signature	<u>2/23/03</u> Date	<u>1</u> Number of School Age Children
<u>Raeimay</u> Name	<u>[Signature]</u> Signature	<u>2/28/03</u> Date	<u>1</u> Number of School Age Children
<u>LIDIA KOU</u> Name	<u>[Signature]</u> Signature	<u>2/28/03</u> Date	<u>1</u> Number of School Age Children
<u>Patty Trayner</u> Name	<u>[Signature]</u> Signature	<u>2/28/03</u> Date	<u>1</u> Number of School Age Children
<u>Cathleen Nazak</u> Name	<u>[Signature]</u> Signature	<u>2/28/03</u> Date	<u>2</u> Number of School Age Children
<u>MARTIN ROSSIP</u> Name	<u>[Signature]</u> Signature	<u>2/28/2003</u> Date	<u>2</u> Number of School Age Children
<u>Fabian M. O'Brien</u> Name	<u>[Signature]</u> Signature	<u>2/28/2003</u> Date	<u>2</u> Number of School Age Children
<u>PETER EVANS</u> Name	<u>[Signature]</u> Signature	<u>2/28/03</u> Date	<u>1</u> Number of School Age Children





LORI AYYAR

Name

*Lori A*

Signature

3/2/03

Date

2

Number of School Age Children

Sarah Zebb Sarah Zebb

Name

*Sarah Zebb*

Signature

3/4/03

Date

2

Number of School Age Children

Leslie-Ann Campbell

Name

*Leslie-Ann Campbell*

Signature

3/09/03

Date

1

Number of School Age Children

INDU SRINARAYAN

Name

*Indu Srinayan*

Signature

3/09/03

Date

2 1

Number of School Age Children

DAVID HALL

Name

*David Hall*

Signature

3/09/03

Date

2

Number of School Age Children

Name

Signature

Date

Number of School Age Children

Name

Signature

Date

Number of School Age Children

Name

Signature

Date

Number of School Age Children

Name

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Number of School Age Children

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Date

Number of School Age Children

We the undersigned believe that the attached Charter merits consideration and hereby petition the governing board of the Los Altos School District to grant approval of the charter pursuant to Education Code Section 47605 to enable the creation of the Bullis Charter School. The Bullis Charter School agrees to operate the School pursuant to the terms of The Charter Schools Act and the provisions of the School's charter. The petitioners listed below certify that they are parents or guardians who are meaningfully interested in having their children or wards attend the charter school.

By the Lead Petitioner:

Craig A.T. Jones [Signature] 2/27/03  
Name Signature Date

The petitioners recognize CRAIG JONES as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the School District governing board.

By the Petitioners:

<u>Charles Fowler</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>JOHN SWAN</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>JOHN CURCIO</u> Name	<u>[Signature]</u> Signature	<u>2/29/03</u> Date	<u>1</u> Number of School Age Children
<u>Cassandra Miller</u> Name	<u>[Signature]</u> Signature	<u>2/1/03</u> Date	<u>2</u> Number of School Age Children
<u>[Signature]</u> Name	<u>[Signature]</u> Signature	<u>3/1/03</u> Date	<u>3</u> Number of School Age Children
<u>JILL CURCIO</u> Name	<u>[Signature]</u> Signature	<u>3/1/03</u> Date	<u>1</u> Number of School Age Children
<u>Rebecca P. Colman</u> Name	<u>[Signature]</u> Signature	<u>3/1/03</u> Date	<u>3</u> Number of School Age Children

CATHARINE KRISTIAN [Signature] 3/2/03  
Name Signature Date Number of School Age Children 2

Anula Jayasuriya [Signature] 3/04/03  
Name Signature Date Number of School Age Children 1

ELIZABETH MCKAYETRIS [Signature] 6 March 05  
Name Signature Date Number of School Age Children 1

Susan Arriaga [Signature] 2/4/03  
Name Signature Date Number of School Age Children 1

PEGGY AOKI [Signature] 3/6/03  
Name Signature Date Number of School Age Children 1

Jenny Murray [Signature] 3/6/03  
Name Signature Date Number of School Age Children 1

Kathleen Stukenberg [Signature] 3/6/03  
Name Signature Date Number of School Age Children 1

Karen Willis [Signature] 3/6/03  
Name Signature Date Number of School Age Children 1

Katherine Lang [Signature] 3/6/03  
Name Signature Date Number of School Age Children 2

CHRISTIAN BASS [Signature] 3/6/03  
Name Signature Date Number of School Age Children 1

DON AOKI [Signature] 3/6/03  
Name Signature Date Number of School Age Children 1

\_\_\_\_\_  
Name Signature Date Number of School Age Children

\_\_\_\_\_  
Name Signature Date Number of School Age Children

\_\_\_\_\_  
Name Signature Date Number of School Age Children



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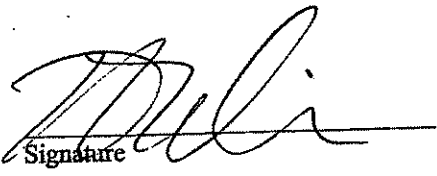

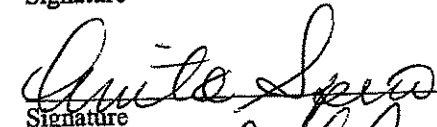


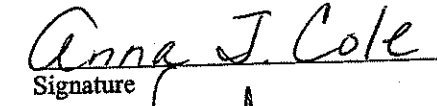

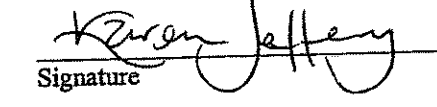
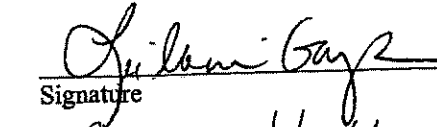
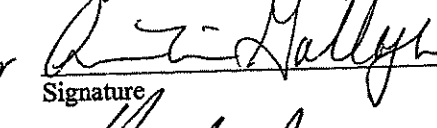
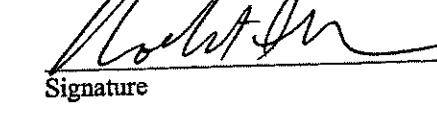
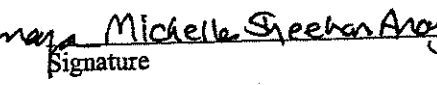
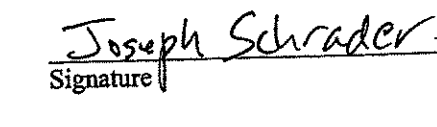
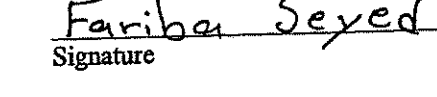
By the Lead Petitioner:

Craig A. T. Jones [Signature] 2/27/03  
Name Signature Date

The petitioners recognize CRAIG JONES as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the School District governing board.

By the Petitioners:

<u>SOHRAB Kianian</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>Linda Swan</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>Monica Diacomini</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>Annie Leung</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>3</u> Number of School Age Children
<u>Rebecca Hickman</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>Nancy Lippe</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>Sharon Smith</u> Name	<u>[Signature]</u> Signature	<u>2/29/03</u> Date	<u>3</u> Number of School Age Children

MARLIN MILLER		2/27/03	2
Name	Signature	Date	Number of School Age Children
Kuniko Ozawa		2/27/03	1
Name	Signature	Date	Number of School Age Children
Anita Spiro		2/27/03	2
Name	Signature	Date	Number of School Age Children
Michael Cole		2/27/03	3
Name	Signature	Date	Number of School Age Children
SRINIVAS REDDY		2-27-03	2
Name	Signature	Date	Number of School Age Children
Annag Cole		2-27-03	3
Name	Signature	Date	Number of School Age Children
MARTIN NEIMAN		2/27/03	2
Name	Signature	Date	Number of School Age Children
KAREN JEFFERY		2-27-03	1
Name	Signature	Date	Number of School Age Children
Jilani Gayz		2-27-03	2
Name	Signature	Date	Number of School Age Children
Anne Marie Gallagher		2/27/03	2
Name	Signature	Date	Number of School Age Children
Rob Theris		2/28/03	2
Name	Signature	Date	Number of School Age Children
Michelle Sreerana		2/01/03	1
Name	Signature	Date	Number of School Age Children
Joseph Schrader		3/04/03	2
Name	Signature	Date	Number of School Age Children
Fariba Seyed		3/2/03	1
Name	Signature	Date	Number of School Age Children



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By the Lead Petitioner:

Craig A.T. Jones [Signature] 2/27/03  
Name Signature Date

The petitioners recognize CRAG JONES as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the School District governing board.

By the Petitioners:

<u>MANSOUR MOUSSAVIAN</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>VIJAY VAIDYANATHAN</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>SHEENA VAIDYANATHAN</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>Lysbeth Goodman</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>1</u> Number of School Age Children
<u>Allison Leopold Tilley</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>Robert Elson</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>2</u> Number of School Age Children
<u>Tim Garverick</u> Name	<u>[Signature]</u> Signature	<u>2/27/03</u> Date	<u>3</u> Number of School Age Children

Lee Garverick  
Name

Lee Garverick  
Signature

2/27/03  
Date

3  
Number of School  
Age Children

Diana Neiman  
Name

Diana Neiman  
Signature

2/27/03  
Date

3  
Number of School  
Age Children

Colette Cranston  
Name

Colette Cranston  
Signature

3/7/03  
Date

1  
Number of School  
Age Children

Kim Cranston  
Name

Kim Cranston  
Signature

3/8/03  
Date

1  
Number of School  
Age Children

Sue Chou  
Name

Sue Chou  
Signature

3/8/03  
Date

2  
Number of School  
Age Children

Timothy Chou  
Name

Timothy Chou  
Signature

3/8/03  
Date

2  
Number of School  
Age Children

\_\_\_\_\_  
Name

\_\_\_\_\_  
Signature

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Number of School  
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Number of School  
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Number of School  
Age Children

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Name

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Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Number of School  
Age Children

We the undersigned believe that the attached Charter merits consideration and hereby petition the governing board of the Los Altos School District to grant approval of the charter pursuant to Education Code Section 47605 to enable the creation of the Bullis Charter School. The Bullis Charter School agrees to operate the School pursuant to the terms of The Charter Schools Act and the provisions of the School's charter. The petitioners listed below certify that they are parents or guardians who are meaningfully interested in having their children or wards attend the charter school.

By the Lead Petitioner:

Craig A.T. Jones Craig A.T. Jones 2/27/03  
Name Signature Date

The petitioners recognize CRAIG JONES as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the School District governing board.

By the Petitioners:

<u>Cork Battenfield</u> Name	<u>Cork Battenfield</u> Signature	<u>2-27-03</u> Date	<u>1</u> Number of School Age Children
<u>Jennifer Ridgley</u> Name	<u>Jennifer Ridgley</u> Signature	<u>2-27-03</u> Date	<u>1</u> Number of School Age Children
<u>ROBERT HON</u> Name	<u>Robert Hon</u> Signature	<u>2.27.03</u> Date	<u>2</u> Number of School Age Children
<u>Taylor Goldsobel</u> Name	<u>Taylor Goldsobel</u> Signature	<u>2.27.03</u> Date	<u>1</u> Number of School Age Children
<u>Acenia Farrand</u> Name	<u>Acenia Farrand</u> Signature	<u>2-27-03</u> Date	<u>2</u> Number of School Age Children
<u>Erica Vener</u> Name	<u>Erica Vener</u> Signature	<u>3/1/03</u> Date	<u>2</u> Number of School Age Children
<u>Jennifer McLake</u> Name	<u>Jennifer McLake</u> Signature	<u>3/1/03</u> Date	<u>2</u> Number of School Age Children

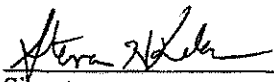

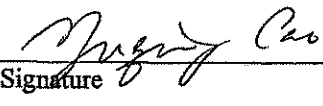
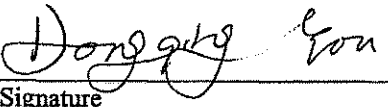
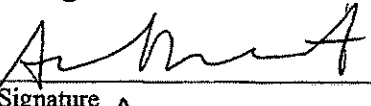
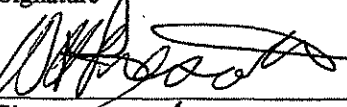
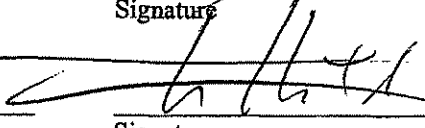
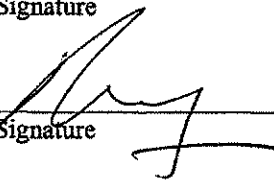
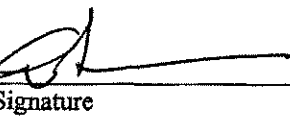
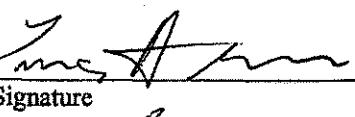

<u>PAUL McCABE</u> Name	<u>Paul McCabe</u> Signature	<u>030302</u> Date	<u>2</u> Number of School Age Children
<u>CHARLES COMBARD</u> Name	<u>Charles Combard</u> Signature	<u>3-2-03</u> Date	<u>2</u> Number of School Age Children
<u>Eric Clow</u> Name	<u>Eric Clow</u> Signature	<u>3/9/03</u> Date	<u>2</u> Number of School Age Children
<u>Fong Wang Clow</u> Name	<u>Fong Wang Clow</u> Signature	<u>3/9/03</u> Date	<u>2</u> Number of School Age Children
<u>W. Scott PRATER</u> Name	<u>W. Scott Prater</u> Signature	<u>3/9/03</u> Date	<u>1</u> Number of School Age Children
<u>Nanette Watson</u> Name	<u>Nanette Watson</u> Signature	<u>3/9/03</u> Date	<u>1 (K)</u> Number of School Age Children
<u>James McGraw</u> Name	<u>James McGraw</u> Signature	<u>3/9/03</u> Date	<u>1 (K)</u> Number of School Age Children
<u>Simon Lau</u> Name	<u>Simon Lau</u> Signature	<u>3/9/03</u> Date	<u>2</u> Number of School Age Children
<u>Kinley Karlson</u> Name	<u>Kinley Karlson</u> Signature	<u>3/9/03</u> Date	<u>2 (1st)</u> Number of School Age Children
<u>Jerry Chang</u> Name	<u>Jerry Chang</u> Signature	<u>3/9/03</u> Date	<u>2</u> Number of School Age Children
<u>JOSEPH NEMETH</u> Name	<u>Joseph Nemeth</u> Signature	<u>3/9/03</u> Date	<u>1</u> Number of School Age Children
<u>Julie Arnheim</u> Name	<u>Julie Arnheim</u> Signature	<u>3/9/03</u> Date	<u>2</u> Number of School Age Children
<u>Elizabeth Breitbart</u> Name	<u>Elizabeth Breitbart</u> Signature	<u>3/9/03</u> Date	<u>1</u> Number of School Age Children
<u>Mark Breitbart</u> Name	<u>Mark Breitbart</u> Signature	<u>3-9-03</u> Date	<u>1</u> Number of School Age Children

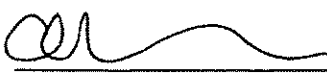
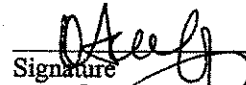
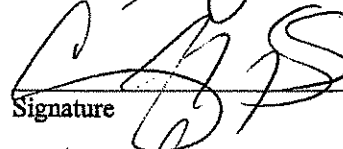
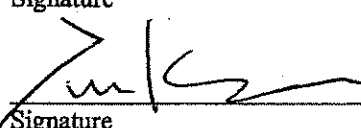
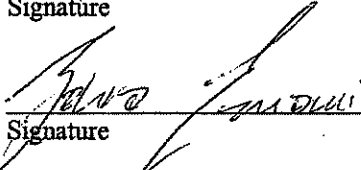
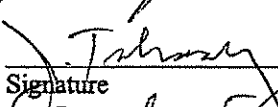
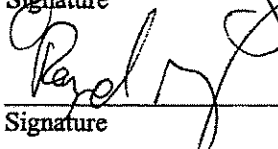








Steven Kelen Name	 Signature	3/1/03 Date	2 Number of School Age Children
Todd Anhalt Name	 Signature	3/1/03 Date	1 Number of School Age Children
CAROL BERG Name	CaroBerg Signature	3/1/03 Date	1 Number of School Age Children
Yu Qing Cao Name	 Signature	3/1/03 Date	1 Number of School Age Children
Dongqing You Name	 Signature	3/1/03 Date	1 Number of School Age Children
Lufeng Zou Name	Lufeng Zou Signature	3/1/03 Date	1 Number of School Age Children
Andrew Name	 Signature	3/1/03 Date	1 Number of School Age Children
Wm Prescott Name	 Signature	3/1/03 Date	1 Number of School Age Children
<del>GENE ILSTAD</del> Name	<del></del> Signature	<del>3/1/03</del> Date	<del>0</del> Number of School Age Children
RAJ REDDY Name	 Signature	3/1/2003 Date	2 Number of School Age Children
<del>Tom Brown</del> Name	<del>Tom BROWN</del> Signature	<del>3/1/03</del> Date	<del>1</del> outst area Number of School Age Children
LEO TORREANO Name	 Signature	3/1/03 Date	2 Number of School Age Children
Leon Herman Name	 Signature	3/1/03 Date	2 Number of School Age Children
MADVI RAYA Name	 Signature	3/1/03 Date	2 Number of School Age Children

Laurie Hodgen Name	Laurie Hodgen Signature	3/2/03 Date	1 Number of School Age Children
Chris Cummins Name	 Signature	3/2/03 Date	1 Number of School Age Children
Gary Kieff Name	Gary Kieff Signature	3/2/03 Date	3 Number of School Age Children
Dave Schmitt Name	 Signature	3/2/03 Date	3 Number of School Age Children
C.A. Wemyss Name	 Signature	3/2/03 Date	3 Number of School Age Children
M. Simmons Name	M. Simmons Signature	3/2/03 Date	2 Number of School Age Children
D.J. Kitano Name	 Signature	3/2/03 Date	2 Number of School Age Children
S. Kizano Name	Satoko Kizano Signature	3/2/03 Date	2 Number of School Age Children
<del>D. Alvarado</del> Name	<del>D. Alvarado</del> Signature	<del>3/2/03</del> Date	<del>0</del> Number of School Age Children
Zohio Emami Name	 Signature	3/2/03 Date	1 Number of School Age Children
Joseph Tuharsky Name	 Signature	3/2/03 Date	1 Number of School Age Children
Raymond Milkey Name	 Signature	3/2/03 Date	2 Number of School Age Children
Nancy L. Kelem Name	Nancy L. Kelem Signature	3/2/03 Date	2 Number of School Age Children
Michelle Wu Name	Michelle Signature	3/2/03 Date	2 Number of School Age Children

<u>STEVEN A. SWERNOSKI</u> Name	<u>[Signature]</u> Signature	<u>03-03-2003</u> Date	<u>3</u> Number of School Age Children
<u>Lisa Barton-OLT</u> Name	<u>Lisa Barton-olt</u> Signature	<u>03-03-2003</u> Date	<u>1 elementary</u> Number of School Age Children
<u>Laura McCarthy</u> Name	<u>Laura McCarthy</u> Signature	<u>3-3-03</u> Date	<u>2</u> Number of School Age Children
<u>Martha Bowden</u> Name	<u>Martha Bowden</u> Signature	<u>3-3-02</u> Date	<u>1</u> Number of School Age Children
<u>Christina Molina</u> Name	<u>Christina Molina</u> Signature	<u>3-3-02</u> Date	<u>3</u> Number of School Age Children
<u>MARY ROSE TITELS</u> <u>Mary Rose Titels</u> Name	<u>Mary Rose Titels</u> Signature	<u>3-3-02</u> Date	<u>2</u> Number of School Age Children
<u>Lynn Miller</u> Name	<u>Lynn Miller</u> Signature	<u>3-3-03</u> Date	<u>2</u> Number of School Age Children
<u>Steve Johnson</u> Name	<u>[Signature]</u> Signature	<u>3-3-03</u> Date	<u>KV 3rd '03</u> Number of School Age Children
<u>Marilyn Mook</u> Name	<u>Marilyn Mook</u> Signature	<u>3/3/03</u> Date	<u>495 (2)</u> Number of School Age Children
<u>Deepak Chandani</u> Name	<u>[Signature]</u> Signature	<u>3/3/03</u> Date	<u>2 (both 7)</u> Number of School Age Children
<u>LORI NELSON</u> Name	<u>Lori Nelson</u> Signature	<u>3/3/03</u> Date	<u>1 (11)</u> Number of School Age Children
<u>SUBINA DESAI</u> Name	<u>[Signature]</u> Signature	<u>3/3/03</u> Date	<u>1 (Age 6)</u> Number of School Age Children
<u>ROBIN ALLEN</u> Name	<u>[Signature]</u> Signature	<u>3/3/03</u> Date	<u>1 (AGE 4)</u> Number of School Age Children
<u>MARILYN CLEMO</u> Name	<u>Marilyn Clemo</u> Signature	<u>3/3/03</u> Date	<u>1</u> Number of School Age Children

<u>Cate Collins</u> Name	<u>[Signature]</u> Signature	<u>3-3-03</u> Date	<u>2</u> Number of School Age Children
<u>RAMESH DIMISA</u> Name	<u>[Signature]</u> Signature	<u>3/3/03</u> Date	<u>1</u> Number of School Age Children
<del>Howard</del> <u>Felicity Kuo</u> Name	<u>[Signature]</u> Signature	<u>3/3/03</u> Date	<u>1</u> Number of School Age Children
<u>Elise Levenson</u> Name	<u>[Signature]</u> Signature	<u>3/3/03</u> Date	<u>1</u> Number of School Age Children
<u>Nancy Lai</u> Name	<u>[Signature]</u> Signature	<u>3/3/03</u> Date	<u>2</u> Number of School Age Children
<u>Julie Hall</u> Name	<u>[Signature]</u> Signature	<u>3/3/03</u> Date	<u>2</u> Number of School Age Children
<u>Qifa Kashani</u> Name	<u>[Signature]</u> Signature	<u>3/3/03</u> Date	<u>1</u> Number of School Age Children
<u>Cameron Bilger</u> Name	<u>[Signature]</u> Signature	<u>        </u> Date	<u>0</u> Number of School Age Children
<u>Terri Goldman</u> Name	<u>[Signature]</u> Signature	<u>3/3/03</u> Date	<u>1</u> Number of School Age Children
<u>Flora Azimi</u> Name	<u>[Signature]</u> Signature	<u>3/3/03</u> Date	<u>1</u> Number of School Age Children
<u>Vera Elson</u> Name	<u>[Signature]</u> Signature	<u>3/4/03</u> Date	<u>2</u> Number of School Age Children
<u>Wingkuen Chung</u> Name	<u>[Signature]</u> Signature	<u>3/4/03</u> Date	<u>2</u> Number of School Age Children
<del>JOAN E. SHERLOCK</del> <u>[Signature]</u> Name	<u>[Signature]</u> Signature	<u>3/4/03</u> Date	<u>1</u> Number of School Age Children
<u>        </u> Name	<u>        </u> Signature	<u>        </u> Date	<u>        </u> Number of School Age Children

We the undersigned believe that the attached Charter merits consideration and hereby petition the governing board of the Los Altos School District to grant approval of the charter pursuant to Education Code Section 47605 to enable the creation of the Bullis Charter School. The Bullis Charter School agrees to operate the School pursuant to the terms of The Charter Schools Act and the provisions of the School's charter. The petitioners listed below certify that they are parents or guardians who are meaningfully interested in having their children or wards attend the charter school.

By the Lead Petitioner:

Craig A. T. Jones Craig A. T. Jones 2/27/03  
Name Signature Date

The petitioners recognize Craig Jones as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the School District governing board.

By the Petitioners:

<u>Scott Duchin</u> Name	<u>Scott Duchin</u> Signature	<u>3/2/03</u> Date	<u>6</u> Number of School Age Children
<u>Jane Lombard</u> Name	<u>Jane Lombard</u> Signature	<u>3/2/03</u> Date	<u>1</u> Number of School Age Children
<u>William Marken</u> Name	<u>William Marken</u> Signature	<u>3/2/03</u> Date	<u>1</u> Number of School Age Children
<u>Jane Duperrault</u> Name	<u>Jane Duperrault</u> Signature	<u>3-2-03</u> Date	<u>1</u> Number of School Age Children
<u>Diane Cassam</u> Name	<u>Diane Cassam</u> Signature	<u>3-2-03</u> Date	<u>0</u> Number of School Age Children
<u>George Thasit III</u> Name	<u>George Thasit III</u> Signature	<u>3/2/03</u> Date	<u>1</u> Number of School Age Children
<u>Pamela Jones</u> Name	<u>Pamela Jones</u> Signature	<u>3/2/03</u> Date	<u>2</u> Number of School Age Children

Peter Chronis

Name

*[Signature]*

Signature

3-4-03

Date

1  
Number of School Age Children

BARTON O'SREEN

Name

*[Signature]*

Signature

3/4/03

Date

1  
Number of School Age Children

RALPH L ARNHEIM III

Name

*[Signature]*

Signature

3/4/03

Date

3  
Number of School Age Children

AMEESH DIVATIA

Name

*[Signature]*

Signature

3/4/03

Date

1  
Number of School Age Children

Kathy Wempner

Name

*[Signature]*

Signature

3/4/03

Date

1  
Number of School Age Children

Shirley Peffley

Name

*[Signature]*

Signature

3-5-03

Date

2  
Number of School Age Children

Howard Kuo

Name

*[Signature]*

Signature

3-5-03

Date

1  
Number of School Age Children

Messam Mohajeri

Name

*[Signature]*

Signature

3/5/03

Date

1  
Number of School Age Children

Teresa a Baker

Name

*[Signature]*

Signature

3/5/03

Date

1  
Number of School Age Children

<sup>2/10</sup>  
Dwp. PO-JEN LIN

Name

*[Signature]*

Signature

3-5-03

Date

1  
Number of School Age Children

Pich B KASHI

Name

*[Signature]*

Signature

3-5-03

Date

1  
Number of School Age Children

Ying Liu

Name

*[Signature]*

Signature

3-5-03

Date

2  
Number of School Age Children

Name

Signature

Date

Number of School Age Children

Name

Signature

Date

Number of School Age Children





BENJAMIN A. ARONSON  
Name

*Ben Aronson*  
Signature

3-4-03  
Date

1  
Number of School Age Children

STEN FROYSHOV  
Name

*Sten Froyshov*  
Signature

3-5-03  
Date

3  
Number of School Age Children

Alicia Preciado  
Name

*Alicia Preciado*  
Signature

03-05-03  
Date

2  
Number of School Age Children

Siobhan Korman  
Name

*Siobhan Korman*  
Signature

03-05-03  
Date

4  
Number of School Age Children

Mary Pereyra  
Name

*Mary Pereyra*  
Signature

03-05-03  
Date

1  
Number of School Age Children

Kelly Mahoney  
Name

*Kelly Mahoney*  
Signature

03-06-03  
Date

1  
Number of School Age Children

Cindy Kim  
Name

*Cindy Kim*  
Signature

3-6-03  
Date

1  
Number of School Age Children

Doug Ahrens  
Name

*Doug Ahrens*  
Signature

3/6/03  
Date

1  
Number of School Age Children

\_\_\_\_\_  
Name

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Signature

\_\_\_\_\_  
Date

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Number of School Age Children

\_\_\_\_\_  
Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Number of School Age Children







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By the Lead Petitioner:

Craig AT Jones [Signature] 2/27/03  
Name Signature Date

The petitioners recognize Craig Jones as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the School District governing board.

By the Petitioners:

<u>[Signature]</u> Name	<u>[Signature]</u> Signature	<u>3/5/03</u> Date	<u>1</u> Number of School Age Children
<u>Bill Luceo</u> Name	<u>BILL LUCEO</u> Signature	<u>3/5/03</u> Date	<u>1</u> Number of School Age Children
<u>Maelynn Craig</u> Name	<u>Maelynn Craig</u> Signature	<u>3-5-03</u> Date	<u>0</u> Number of School Age Children
<u>TIA Lively</u> Name	<u>[Signature]</u> Signature	<u>3-5-03</u> Date	<u>0</u> Number of School Age Children
<u>Kate M. Dermott</u> Name	<u>KATE M. DERMOTT</u> Signature	<u>3-5-03</u> Date	<u>0</u> Number of School Age Children
<u>J.P. Rudek</u> Name	<u>Jane Rudek</u> Signature	<u>3-5-03</u> Date	<u>0</u> Number of School Age Children
<u>[Signature]</u> Name	<u>Sue POKRAF</u> Signature	<u>3/6/03</u> Date	<u>0</u> Number of School Age Children

Susan Threshke  
Name

[Signature] 3/6/03  
Signature Date

0  
Number of School Age Children

ANDREW  
Name

[Signature] 3/7/03  
Signature Date

1  
Number of School Age Children

J. Michel  
Name

[Signature] 3/7/03  
Signature Date

0  
Number of School Age Children

[Signature]  
Name

[Signature] 3/8/03  
Signature Date

0  
Number of School Age Children

Larry Harsh  
Name

[Signature] 3/8/03  
Signature Date

0  
Number of School Age Children

Doug Bane  
Name

[Signature] 3/8/03  
Signature Date

0  
Number of School Age Children

Michael Ando  
Name

[Signature] 3/8/03  
Signature Date

1  
Number of School Age Children

MARIN AVRAH  
Name

[Signature] 3/8/03  
Signature Date

2  
Number of School Age Children

Donald Holmes  
Name

[Signature] 3/9/03  
Signature Date

0  
Number of School Age Children

WINN MURRAY  
Name

[Signature] 3/8/03  
Signature Date

4  
Number of School Age Children

Stoddie Bryson  
Name

[Signature] 3/8/03  
Signature Date

0  
Number of School Age Children

Darrell Davis  
Name

[Signature] 3/8/03  
Signature Date

0  
Number of School Age Children

Chudra Carter  
Name

[Signature] 3/8/03  
Signature Date

0  
Number of School Age Children

Carrick Decker, Carrick White  
Name

[Signature] 3/8/03  
Signature Date

1  
Number of School Age Children





# **DISTRICT IMPACT STATEMENT**

# **District Impact Statement**

## **Bullis Charter School**

### **INTENT**

This statement is intended to fulfill the terms of Education Code Section 47605(g) and provides information regarding the proposed operation and potential effects of the Bullis Charter School on the Los Altos School District. This document is intended for informational purposes only and to assist the District in understanding how the proposed school may affect the District. This, as an informational document, does not constitute a legally binding contract or agreement, is not intended to govern the relationship of the School and District, and is not a part of the charter of Bullis Charter School or any related agreements or memoranda of understanding.

### **CIVIL LIABILITY**

Bullis Charter School is a California non-profit public benefit corporation. This corporation is organized and operated exclusively for charitable purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code and California Revenue and Taxation Code Section 23701d. The primary objective of the corporation is to provide public education for residents of the State of California, in accordance with the Charter Schools Act, California Education Code Section 46700, et seq.

Pursuant to Education Code Section 47604(c), a District that grants a charter to a charter school operated as a non-profit public benefit corporation shall not be liable for the debits or obligations of the charter school. The Bullis Charter School bylaws follow in Appendix A.

Further, the memorandum of understanding between the Bullis Charter School and the District detailing the legal and fiscal relationship shall provide for indemnification of the School District. A draft memorandum of understanding is attached as Appendix B.

The corporate bylaws of the Bullis Charter School shall provide for indemnification of the school's Board of Directors, officers, agents, and employees, and the School will purchase general liability insurance, Directors and Officers insurance, and fidelity bonding to secure against financial risks. The District shall be named an additional insured on the general liability insurance of the Charter School.

The Board of Directors will institute appropriate risk management practices, including screening of employees where appropriate, establishing codes of conduct for students, staff, and participating families, and procedures governing financial transactions and dispute resolution.

## **ADMINISTRATIVE SERVICES**

A school principal will assume the lead responsibility for administering the School under the policies adopted by the School's Board of Directors. The petitioners anticipate that the Charter School will provide or procure most of its own administrative services, including but not limited to financial management, personnel, and instructional program development. The petitioners are interested in discussing the possibility of purchasing some of these or other services from the District. The specific terms and cost for these services will be the subject of an annual memorandum of understanding between the Charter School and the District. Should such services be unavailable from the District or should the Parties be unable to successfully negotiate a mutually agreeable memorandum of understanding regarding the terms or cost of such services, the petitioners have arranged for such services to be available from the California Administrative Services Authority ("CASA").

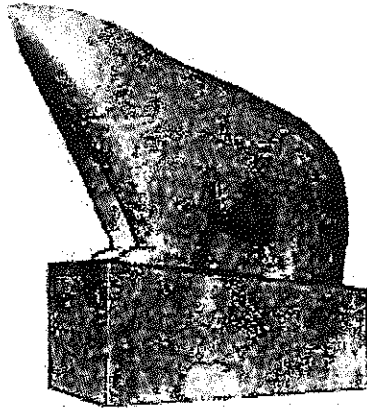
## **FACILITIES**

Bullis Charter School intends to locate in the former facility of the Bullis-Purissima Elementary School at 25890 Fremont Road, Los Altos Hills, CA 94022. The petitioners are interested in discussing the specific terms, rights, and responsibilities related to the location of the Charter School at that facility with the District.

## **FINANCIAL STATEMENTS**

A financial outline for Bullis Charter School is enclosed as Appendix C. This plan is based on the best data available to the petitioners at this time.

# **Bullis Charter School**



## **Multi Year Strategic Fiscal Plan**

**In Support of**

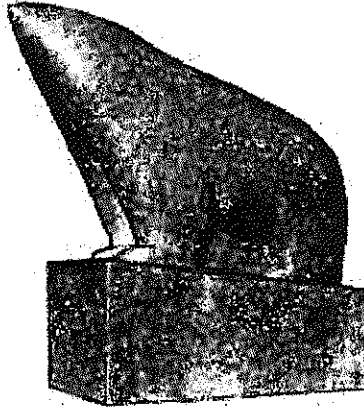
## **Charter School Petition**

**Prepared for the Los Altos School District  
and  
the Community of Los Altos**

**March 2003**

# Bullis Charter School

## Strategic Fiscal Plan



The **Multi Year Strategic Plan** for the **Bullis Charter School** is presented for your review and information. This material has been compiled and is presented in five sections and is a document intended to complement the Charter School Petition..

**Section I – Strategic Budget Development Management Plan** identifies the basis on which the school's budget and fiscal operations are based. It explains and outlines both the school's key budget guidelines as well as the specific budget assumptions. Other major highlights of this section also include the identification of the critical variables for the charter school's budget development and budget management throughout the fiscal year. A Budget Responsibility Matrix – 'who does what when' is also presented.

This Section also explains that the **budget document is a fluid document** and is subject to **refinement** and **update** on a regular basis. The multi-year budget projection plan intends to review and update the budget for the current year at least monthly. With each budget refinement for the current year, updates are automatically generated for the future year budget projections.

**Section II – Summary Multi-Year Budget** is the five-year projection for the school's entire operations. This document includes all estimated revenues and expenditures on a yearly basis along with the projected surplus or deficit each year. **Beginning and ending balance projections** are also included along with the identification of **reserve accounts**.

**Section III – Multi-Year Demographic Variables<sup>1</sup>** is the first section in which the **key variables of budget development** are **outlined**. This section, while a bit lengthy, identifies the foundation on which the budget is built. The major student attributes, ranging from enrollment by grade level to other important demographic characteristics of students are projected as the various individual student profiles are the factors on which many state and federal program fundings and entitlements are based. **Student attendance** is compiled, presented and analyzed in several ways as it is the determinant for about 50% of the school's funding. A corresponding student attendance monitoring system complements the regular monthly budget monitoring of student attendance.

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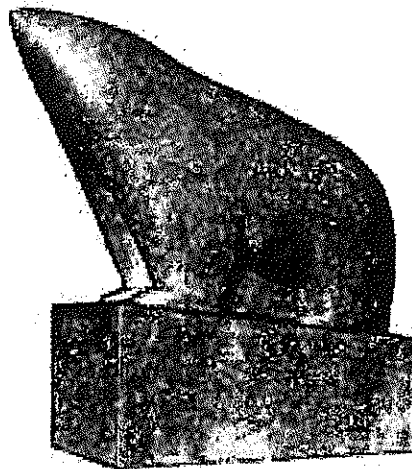
<sup>1</sup> Note that the acronym 'KV' on the bottom of sheets in Sections III and IV refers to 'Key Variables'

# BULLIS CHARTER SCHOOL

## MULTI-YEAR STRATEGIC FINANCIAL PLAN 2003-2004 THROUGH 2007-2008

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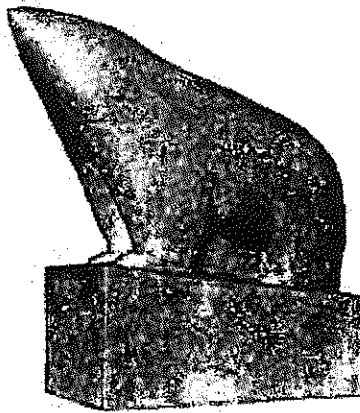
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<b>SUMMARY MULTI-YEAR BUDGET</b>	<b>SECTION II</b>
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<b>CASH FLOW PROJECTION</b>	<b>SECTION VI</b>



March 2003

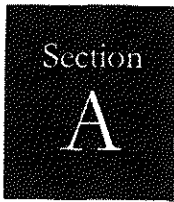
## Section I

### Strategic Budget Development Management Plan



**Section I – Strategic Budget Development and Management Plan** is the schools' strategic fiscal plan for the next five years of operation. In this document **Budget Guidelines**, the Budget Assumptions, **Student Enrollment Projections**, and Staffing Patterns are **described** in a **narrative** format. In addition, other important explanations relating to the school's fiscal management operations are outlined.

This Section identifies the key variables that will impact the school's budget development and financial plan and is complemented by the detailed fiscal data in subsequent sections.



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**Bullis Charter School: Budget Data  
Preliminary Budget Development and Management Plan**

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**Overview**

The Bullis-Purissima Elementary School, hereinafter identified as the Bullis Charter School, or BCS, presents this Multi-Year Strategic Plan to the Los Altos School District, March, 2003. This Budget Narrative is intended to complement the Budget Plan, which accompanies the Bullis Charter School Petition.

Budget preparation and budget projections for the 2003–2004 school-year are particularly challenging with the current uncertainty associated with the state budget process and the state's funding for public education. The Budget Plan for the Bullis Charter School has thus been developed on a fiscally conservative basis, with all key variables identified. As the state's budget plans are refined the School's budget plans will be refined.

In addition, the Budget Plan contains Reserves for Economic Uncertainty to allow for changes to both the state budget plan and for mid-year budget adjustments that may be necessary because of a wide range of variable modifications ranging from student enrollment fluctuations to a mid-year state funding reduction.

The 2003–2004 Budget Plan will be monitored weekly during the Spring – Summer of 2003 and refinements and updates will be prepared on a regular basis.

The Budget Plan contains the following major sections:

1. Identification of Key Budget Variables
2. Budget Guidelines for Bullis Charter School, 2003–2004
3. Budget Assumptions for Bullis Charter School, 2003–2004
4. Multi-Year Budget Projection, 2003–2004 to 2007–2008
5. School Budget Responsibility Matrix
6. Budget Calendar for 2003–2004

Members of the Charter School Development Team are available to meet with the District and its representatives to explain the Charter School's Budget Plan.

**The Charter School Development Team wishes to emphasize that all budget variables are subject to update and revision. The Petitioners understand and accept the responsibility for continual budget monitoring and refinement during this period of fiscal uncertainty at the state funding level.**

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**Critical Variables**

While the Budget Plan for the Bullis Charter School is being submitted in March 2003, one of the first components in the Critical Variables is the notation that there will be an immediate review and refinement of the Plan. This continual assessment is necessary because the multiple variables associated with California public school budgeting require frequent review. As a new school, we are demonstrating our recognition of this need.

**Budget Assumptions for 2003–2004**

- Consultant to Prepare
- Draft Due for School to Review, April 12, 2003
- Governance Board to Review and Adopt, April (TBA), 2003

**Student Enrollment and ADA Projections for 2003–2004**

- School to Prepare
- Draft Due for Review, April 12, 2003

**Revenue Projections for 2003–2004**

- Consultant to Prepare
- Draft Due for Review, April 19, 2003

**Draft Budget 2003–2004**

- School to Prepare, Based upon Governance Board Approved Budget Assumptions
- Draft Due for Consultant, District, and County Office Review, April 26, 2003
- Consultant, District and County to Provide Written Critique by May TBA, 2003
- Governance Board to Review Late May 2003

**2003–2004 Final Budget**

- School to Prepare, Based upon Governance Board Approved Budget Assumptions and May Revise Provisions
- Draft Due for Consultant, District and County Office Review, June 8, 2003
- Consultant, District and County to Provide Written Critique by June 15, 2003
- Governance Board to Review and Adopt, June 30, 2003

**Staffing Projections for 2003–2004**

- School to Prepare
- Draft Due for Review, April 19, 2003
  - By Site Based Program
  - By Independent Study Program
  - By Identified Staffing Formula or Ratio
  - By Full Time Equivalent Staff

**Employee Benefit Matrix**

- School to Prepare, Based upon School Parameters
- Draft Due for Review, April 19, 2003

**2003–2004 Budget Update**

- School to Prepare, Based upon Governance Board Approved Budget Assumptions and Adopted State Budget Provisions
- Draft Due for Consultant, District and County Office Review, 20 days after State Budget Adopted

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- Consultant, District and County to Provide Written Critique 30 days after State Budget Adopted
- Governance Board to Review and Adopt, within 45 days after State Budget Adopted

**2003–2004 First Budget Revision Report**

- School to Prepare, Based upon Governance Board Approved Budget Assumptions and Actual October 2003 Student Enrollment
- Draft Due for Consultant, District and County Office Review, November 15, 2003
- Consultant, District and County to Provide Written Critique by November 30, 2003
- Governance Board to Review and Adopt by December 15, 2003

**2003–2004 Second Budget Revision Report**

- School to Prepare, Based upon Governance Board Approved Budget Assumptions and Actual First Period Attendance Data
- Draft Due for Consultant, District and County Office Review, January 20, 2004
- Consultant, District and County to Provide Written Critique by January 31, 2004
- Governance Board to Review and Adopt by February 15, 2004

**2003–2004 Third Budget Revision Report**

- School to Prepare, Based upon Governance Board Approved Budget Assumptions and Actual Second Period Attendance Data
- Draft Due for Consultant, District and County Office Review, April 30, 2004
- Consultant, District and County to Provide Written Critique by May 15, 2004
- Governance Board to Review and Adopt by May 31, 2004

**Multi Year Budget Projections**

- School to Prepare Each Time Budget Update Prepared
- Multi-Year Projection to Include All Key Budget Variables
- Multi-Year Projections to Include Minimum of Three Fiscal Years

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Section

**B**

**Budget Guidelines for Bullis Charter School, 2003–2004**

1. The Budget shall support the Beliefs, Parameters, Objectives, Strategies and Mission Statement as stated in the Charter Petition.
2. The Budget shall support our site-based program as follows:

⇒ *Bullis- Purissima Elementary School 25890 Fremont Road, Los Altos, CA 94022-2617*

The Bullis- Purissima Elementary School, herein after referred to as the Bullis Charter School, or BCS, offers a rigorous, project-based, developmentally appropriate academic program for grades K–6. Students are engaged in real-world projects and are assessed regularly to ensure they are meeting the state and school-based standards.

⇒ *Program and Grade Level Offerings*

The Bullis Charter School is scheduled to open in the 2003–2004 school year. While the school is ultimately planned to offer instruction to 310 students in two classes each from kindergarten through sixth grade, it is scheduled to open at half that capacity, operating one class each in grades kindergarten through six.

In addition to the core subject areas of math, science, language arts, and social studies, Bullis students will participate in other academic classes. All BCS students will participate in art, physical education, and developmentally appropriate technology classes.

Family Involvement is essential to student success at Bullis. Because each family brings unique assets and needs to the school, every family will create a Family Partnership Plan that details their involvement at the school.

⇒ *Class Size Highlights*

One of the major features of the Bullis Charter School is the small class size design that is intended to provide individualized instruction to our students. In grades kindergarten through three, we will utilize a 20 to 1 student to teacher ratio. In grades four through six, we will utilize a student to teacher ratio of 25 to 1.

3. A Budget Responsibility Matrix shall be utilized to identify key roles in budget development and budget management.
4. A Budget Calendar shall be developed and used as a Planning Guide.
5. Budget Assumptions shall be developed, reviewed and updated on a regular basis. Separate assumptions shall be delineated for each key budget variable:
  - ◆ Enrollment and Student Demographics
  - ◆ Average Daily Attendance
  - ◆ Beginning Balance
  - ◆ Revenue
  - ◆ Expenditures
  - ◆ Transfers
  - ◆ Ending Balance
  - ◆ Reserve(s)
  - ◆ Debt
  - ◆ Cash Flow
6. Funds shall be made available to provide competitive total compensation to all school employees.

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7. Staffing ratios shall be maintained to support the highest quality instructional program for students.
8. A Minimum General Fund Reserve for Economic Uncertainty, of the greater of \$50,000 or 3%, shall be maintained in accordance with State Guidelines. In the first year of design, additional funding reserves are planned because of the major uncertainty associated with state funding for public education. A plan to achieve a 5% General Fund Reserve shall be developed to ensure long-term fiscal stability of the School.
9. General Fund Categorical and Grant programs, with the exception of Special Education, shall be self-supporting.
10. State and Federal allowed direct support and indirect support charges shall be consistently applied to all funds and programs. Direct support and indirect support charges contribute to the School's costs associated with the "cost of doing business" factors, such as payroll, personnel, purchasing, custodial, budget and other allied support services.
11. Budget Development and Budget Management shall support decentralized School Site and Program fiscal management.
12. Unrestricted General Fund site and program/department year-end balances shall be carried forward.
13. Restricted Fund and program year-end balances shall be carried forward in accordance with terms and conditions of the grantor.
14. Categorical and grant programs shall not be forward funded by the School without specific Governing Board authorization based upon grantor letter of entitlement.
15. Provision shall be made to preserve the use and value of existing facilities and equipment through capital improvements and preventative maintenance.
16. When a new goal, project, or program is recommended for authorization, the major competing demands for funding and the specific funding source, and/or allocation or reallocation resources required shall be identified.
17. A School-wide budget augmentation process shall be developed to provide input for the allocation of additional resources.
18. One-time funding allocations or resources shall not be used for on-going expenditures.
19. The budget documents shall be summarized by site, type expenditure and program area to allow for ready comparison among these areas and with previous years. Detailed budget information shall be available in order to examine the components of a specific program.
20. The budget document shall include the associated salary, employee benefit cost and full-time equivalent position allocations within each site, department or program area.
21. The budget document shall include financial data from at least two previous years as well as projected current budget data. This format will be phased-in during Years I and II when the two year history will be developed.
22. The budget document shall include a minimum three-year budget projection beyond the current year.
23. The following budgets shall be presented to the BCS Governing Board for information, review and/or approval:
  - Preliminary Budget (early spring)
  - Updated Preliminary Budget (late spring)
  - Final Budget (before July 1)
  - Final Budget Update (within 45 days of the state budget adoption)
  - First Interim Report (within 45 days of October 31)

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- Second Interim Report (within 45 days of January 31)
  - Third Interim Report (within 45 days of March 31)
24. Budget transfers shall be presented to the BCS Governing Board monthly.
  25. Enrollment, Attendance, Budget and Financial Reports shall be presented to the BCS Governing Board monthly.
  26. Carry forward appropriations from prior year shall be presented to the BCS Governing Board for approval no later than October 15<sup>th</sup>, the First Interim report date.
  27. Short and Long Term Debt Obligations of all funds of the School shall be reviewed quarterly.
  28. A 'User Friendly Budget' Document shall be developed and presented to the staff and to the community. This document shall contain budget and fiscal data in clear, understandable language for a lay audience to understand.

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Section  
**C**

**Budget Assumptions for Bullis Charter School, 2003–2004**

1. Budget Assumptions are a very critical component of comprehensive budget development and budget management. All Budget Assumptions need to be updated on a defined basis. This set of Budget Assumptions will be presented and is based on updates and review of each component as follows:
  - January (first budget projection in accord with the Governor’s Proposed Budget)
  - May (after Department of Finance’s ‘May Revise’)
  - June (before final School budget presented to BCS Governing Board for approval)
  - July (within 45 days of chartering of state budget)
  - Interim Reporting Periods (within 45 days of Oct. 31, Jan. 31, and Mar. 31)
  - Attendance Apportionment Periods (within 10 days of first, second and annual apportionment reporting periods)
2. Budget Assumption Updates and Revisions shall be presented to the BCS Governing Board in writing each time they are updated.
3. The Budget Guidelines state that separate Budget Assumptions shall be delineated for each of the following key variables:
  - ◆ Enrollment and Student Demographics
  - ◆ Average Daily Attendance
  - ◆ Beginning Balance
  - ◆ Revenue
  - ◆ Expenditures
  - ◆ Transfers
  - ◆ Ending Balance
  - ◆ Reserve(s)
  - ◆ Debt
  - ◆ Cash Flow

A School Calendar that outlines the student school and the staff work year shall also be included in the Annual Budget Assumptions.

**School Calendar**

4. **The Student School Calendar** – for 2003–2004 shall operate for 185 days, with a beginning date to coincide with that of the Los Altos School District
5. **The Staff Work Year Calendar** for 2003–2004 has tentatively been identified as follows.

Employee Group	Work Year – Months	Work Year – Days	Paid Holidays	Paid Vacations	Paid Professional Leave	Sick and Personal Leave
<b>School Site Staff – Certificated</b>						
Librarian	10	185	N/A	N/A	0.5 d/mo	0.5 d/mo
Principal	11	205	N/A	N/A	0.5 d/mo	0.5 d/mo
Teacher (enrichment)	10	185	N/A	N/A	0.5 d/mo	0.5 d/mo
Teacher (regular)	10	185	N/A	N/A	0.5 d/mo	0.5 d/mo
<b>School Site Staff – Classified, Salaried</b>						
Computer Specialist	10	N/A	Per Calendar	1.0 d/mo	N/A	0.5 d/mo
Custodian/Maintenance	12	N/A	Per Calendar	1.0 d/mo	N/A	0.5 d/mo

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Employee Group	Work Year – Months	Work Year – Days	Paid Holidays	Paid Vacations	Paid Professional Leave	Sick and Personal Leave
Secretary	10	N/A	Per Calendar	1.0 d/mo	N/A	0.5 d/mo
<b>School Site Staff – Classified, Hourly</b>						
Instructional Aides	10	N/A	Per Calendar	0.5 d/mo	N/A	0.5 d/mo

6. School and Work Calendars shall be presented each Spring to the BCS Governing Board; updates shall be presented when Budget Updates and Revisions are prepared. The Work Year Calendar for 2003-2004 will be further refined Spring 2003.

**Enrollment and Student Demographic Data**

School funding in California is often determined by student participation. There are several types of student participation numbers that are used. The major factors are **Enrollment** and **Average Daily Attendance**. Enrollment is generally as of the annual October student statewide count also known as the CBEDS count, but it also could be as of another count date, such as December and May that are the special education student population count times. In addition, enrollment data may be based upon economic criteria, such as the number of student eligible for free or reduced meals or the count may be based on individual student characteristics, such as English language proficiency as reported annually on the annual Spring language census report, the 'R-30.'

**Average Daily Attendance** is extremely important, as it is the primary source of funding for the majority of state revenues. ADA is the number of students present each school day throughout the year, divided by the total number of school days in the school year. This factor is compiled daily and it is reported to the state three times a year. The reporting periods are known as First Period Attendance, Second Period Attendance and Annual Attendance. In the school business world, these time periods are identified as P-1, P-2, and Annual attendance periods. The annual Block Grant Funding and the State Categorical Funding per student is based upon the school's P-2 ADA count each year.

While most programs that are funded on a per ADA basis are funded on the current year attendance, a few programs are funded on prior year ADA. State lottery funding is an example of a program that is funded on prior year data – and to make this a bit more complicated, the funding factor is the prior year annual ADA (rather than the P-2 ADA factor)! Thus it is important to compile and collect both enrollment and ADA data at various times and in various formats.

The School has developed preliminary Enrollment Projections for 2003–04. The Enrollment Projections are the estimated student count, by grade, for Fall 2003. Along with the Enrollment Projections, Average Daily Attendance projections have been developed. The following Charts present this information for review and analysis.

**Enrollment Projections** for October 2003 for site-based programs are presented below along with a combined total projected enrollment for all programs.

1. **Enrollment and Critical Student Demographic Data** - based upon projections provided by the Charter School Developers, March 2003, these estimates are reviewed by the School Site Leadership Team and become the linchpin of budget and staff planning for the budget year.
2. **Enrollment Projections**, once reviewed by the School Site Leadership Team, are presented to the BCS Governing Board and to the community. Updates are to be provided April, May and July in concert with the budget cycle. Enrollment data is to be provided by site, by grade level, by program: general education and special education. Estimated student enrollment data is to be replaced by actual fall student enrollment data; weekly enrollment counts of actual student participation is to be maintained and presented to the School Site Leadership Team for the first six weeks of each semester; monthly enrollment reports are to be provided to the BCS



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Governing Board. Actual enrollment status is to be included with the First, Second, and Third Interim Reports.

Enrollment projections for 2003–2004 through 2009–2010 follow.

**Projected Student Enrollment — By Grade and Grade-Group**

Year Fiscal Year	Year I	Year II	Year III	Year IV	Year V	Year VI	Year VII
	2003–04	2004–05	2005–06	2006–07	2007–08	2008–09	2009–10
	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS
<b>Student Enrollment</b>							
<b>Resident Pupils</b>							
Kindergarten	20	40	40	40	40	40	40
1st Grade	20	40	40	40	40	40	40
2nd Grade	20	40	40	40	40	40	40
3rd Grade	20	40	40	40	40	40	40
4th Grade	25	50	50	50	50	50	50
5th Grade	25	50	50	50	50	50	50
6th Grade	25	50	50	50	50	50	50
<b>Total</b>	155	310	310	310	310	310	310
<b>Summary of All Enrollment</b>							
Grades K-3	80	160	160	160	160	160	160
Grades 4-6	75	150	150	150	150	150	150
<b>Total</b>	155	310	310	310	310	310	310

3. **Enrollment Data**, from a historical base, and including current year projections will be maintained as presented above.

**Average Daily Attendance**

The **Average Daily Attendance (ADA)** Factor, the primary funding component, is the count of the actual days students are present at school. As the principal funding source, it is monitored on a consistent basis. In an established school, one would not expect to see material changes between and among the three attendance reporting periods in the fiscal year. Annually the school's auditor reviews, audits and certifies the school's attendance data.

1. **Average Daily Attendance (ADA)** – General Fund ADA based upon enrollment projection established by the School Principal, early spring and updated April and July when revised enrollment projections are reviewed. ADA updates are also incorporated into First, Second, and Third Interim Reports to the BCS Governing Board. A three-year average of the ratio between Second Period ADA (funded ADA) and fall enrollment will be used in future years to derive the estimated budget ADA. For the first three years of operation, an estimated ratio between Projected Enrollment and Projected ADA will be utilized.

The estimated ratio between Projected Enrollment and Projected ADA for 2003–2004 and future years is 98%. The ratio compliments that of the District as reported in its annual budget document.

2. **ADA Ratio to Enrollment** – The respective ratio between the Annual Fall Enrollment Count and the funded Second Period Attendance data, ADA, is shown by grade span groupings, for

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grades kindergarten through 3, and grades 4 through 6. These distinct groupings are important as funding is allocated differently into these grade span groupings.

The table below shows the actual ratio between Fall Enrollment and Second Period ADA; estimated values (for future dates) are italicized:

**P2 ADA:CBEDS Ratios**

Year Fiscal Year	Year I	Year II	Year III	Year IV	Year V
	2003-04	2004-05	2005-06	2006-07	2007-08
	P-2	P-2	P-2	P-2	P-2
	Estimate	Estimate	Estimate	Estimate	Estimate
<b>Resident Pupil Grade Groups</b>					
Grades K-3	0.98	0.98	0.98	0.98	0.98
Grades 4-6	0.98	0.98	0.98	0.98	0.98

A further review of the ADA and Enrollment ratio is to determine the respective correlation schoolwide between the October Enrollment and the First and Second Period Attendance reporting data. The following chart shows these relationships and the projected ratios for the coming five years.

**P1 ADA:CBEDS and P2 ADA:CBEDS Ratios**

	CBEDS	P-1 ADA	P-1:CBEDS	P-2 ADA	P-2:CBEDS
2003-04	155	152	0.98	152	0.98
2004-05	310	304	0.98	304	0.98
2005-06	310	304	0.98	304	0.98
2006-07	310	304	0.98	304	0.98
2007-08	310	304	0.98	304	0.98

3. **ADA Data** – for the first year of operations, the ADA is based upon an estimated Student Enrollment, an estimated ratio between enrollment and ADA, and estimated ADA. As soon as estimated data can be replaced by actual data, a more refined ADA projection method will be substituted.

**Projected ADA for School 2003-2004 to 2007-2008**

In projecting ADA for 2003-2004 as well as for the four following school years, only Second Period or P-2 ADA is projected. The following chart indicates the Projected P-2 ADA for the next five years:

**Projected Total P-2 ADA, by group**

Year Fiscal Year	Year I	Year II	Year III	Year IV	Year V
	2003-04	2004-05	2005-06	2006-07	2007-08
Grades K-3	78	157	157	157	157
Grades 4-6	74	147	147	147	147
<b>Total ADA</b>	152	304	304	304	304

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**Beginning Fund Balance**

1. **Beginning Fund Balance** — based upon the most current budget and financial report, including interim report(s); audit adjustment (if any) to be included as soon as known. At a minimum, these dates shall be:
  - Governing Board Meeting in July: estimated ending balance for prior year/beginning balance for budget year
  - Governing Board Meeting in August: update of estimated beginning balance
  - Governing Board Meeting in September: pre-final update/final update of unaudited beginning balance
  - Governing Board Meeting in December: audit adjustments to beginning balance
2. **Beginning and Ending Fund Balance** — estimates for the School will be maintained in the following manner:

**Estimated Ending Fund Balances**

Ordinal Year Fiscal Year Budget Type	Year 0	Year I	Year II	Year III	Year IV	Year V
	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget
<b>NET INCREASE/(DECREASE) IN FUND BALANCE</b>	\$ -	\$ 305,956	\$ 92,124	\$ 73,886	\$ 32,221	\$ (19,509)
Beginning Fund Balance						
As of July 1, Unaudited	-	-	305,956	398,080	471,966	504,188
Plus/(Minus) Audit Adjustments	-	-	-	-	-	-
As of July 1, Audited	-	-	305,956	398,080	471,966	504,188
Other Restatements	-	-	-	-	-	-
Net Beginning Balance	-	-	305,956	398,080	471,966	504,188
<b>Ending Fund Balance, June 30</b>	<b>\$ -</b>	<b>\$ 305,956</b>	<b>\$ 398,080</b>	<b>\$ 471,966</b>	<b>\$ 504,188</b>	<b>\$ 484,679</b>

The Ending Balance is further segregated into components, with the opportunity to have a Reserve for Economic Uncertainty that follows state recommended guidelines, as well as to have a Reserve for Restricted Fund Balances, and an Unrestricted Fund Balance that may be used at the discretion of the School's Governance Board. In the BCS first Budget Projection, the following Ending Balance Components are indicated:

**Components for Ending Fund Balances**

Ordinal Year Fiscal Year Budget Type	Year 0	Year I	Year II	Year III	Year IV	Year V
	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget
Miscellaneous Components						
Reserve for Revolving Cash	-	-	-	-	-	-
Stores - Warehouse	-	-	-	-	-	-
Prepaid Expenditures	-	-	-	-	-	-
All Others	-	-	-	-	-	-
General Reserve	-	-	-	-	-	-
Legally Restricted Balances	-	-	-	-	-	-
Designated Amounts						
Designated for Economic Uncertainty	-	50,000	66,044	69,250	72,628	76,175
Other Designations	-	-	-	-	-	-
Undesignated Amount	-	-	-	-	-	-
Unappropriated Amount	-	255,956	332,037	402,716	431,559	408,504
<b>TOTAL COMPONENTS FOR ENDING FUND BALANCE</b>	<b>\$ -</b>	<b>\$ 305,956</b>	<b>\$ 398,080</b>	<b>\$ 471,966</b>	<b>\$ 504,188</b>	<b>\$ 484,679</b>

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For each of the budget years, BCS has consciously built an ending balance in excess of 5%. This Unappropriated Ending Balance is intended to provide insulation from state budget reductions that may be forthcoming.

**Revenue Factors**

**Revenue Sources** for California Charter Schools are generally from three different sources: the state budget, the federal budget and from local community resources.

By far, the state is the largest source of funding, with approximately 80% of charter school funding from this single resource in 2002–2003 on a statewide average. Because of the tremendous reliance on this single revenue source, all components associated with state revenue sources are monitored constantly throughout the year as the funding estimates are refined and recalculated. Final state funding is often not certified until well into the school year, or in some cases, after the school year has ended. For the Bullis Charter School, the projected state funding factor will be just over 70%. The difference between our Charter School and the statewide data is the tremendous financial support available to our school from our school community as demonstrated by our record of support over the years to schools in Los Altos.

**State Revenues**

**State Revenues** — are estimated per specific program variables as identified below. In addition to the general update schedule identified above, grant and categorical revenues are to be updated when state entitlement notification received; funding not appropriated until entitlement notification received.

1. **Cost of Living Allowance** — ‘COLA’ is a term that identifies annual program funding increases for most state funded programs as included in the adopted state budget. The COLA is linked to various economic indices and it changes throughout the budget development process. Projections are made for both the current budget year and for future budget years. The COLA histogram for the past several years as well as the projected COLA for 2003–2004 and the next five years is shown in both of the next two tables (with the current year highlighted in grey).

Note that no funding increase has been projected for the 2003–2004 school year.

2. **Block Grant Funding per ADA** — **General Fund** based upon the Proposed State Budget funding. No state funding deficit factor is projected – but a reserve for state funding reduction has been identified in the Ending Fund Balance section of our Budget Plan.

**Projected Block Grant Funding per ADA**, by Grade Level for 2003–2004, as of the State 2<sup>nd</sup> Interim Report Period, follows. This per unit amount is expected to be revised several times before it is finalized in the state budget deliberations.

**The recent histogram of the School’s Block Grant Funding**, per Unit of ADA, including funding projections for the next five fiscal years, follows (with the current year highlighted in grey).

**Block Grant Funding per ADA,  
Actual Plus Projected Rates**

Year	COLA	Grades K–3	Grades 4–6
2001–02	1.90%	\$ 4,419	\$ 4,477
2002–03	1.66%	\$ 4,515	\$ 4,577
2003–04	1.90%	\$ 4,515	\$ 4,577
2004–05	2.80%	\$ 4,641	\$ 4,705
2005–06	3.10%	\$ 4,785	\$ 4,851
2006–07	3.10%	\$ 4,933	\$ 5,001
2007–08	2.60%	\$ 5,061	\$ 5,131
2008–09	2.60%	\$ 5,193	\$ 5,264

*data valid as of 02/25/03*

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3. **Categorical Funding per ADA — General Fund** based upon the unknown State Budget funding with a 0.00% Cost of Living Allowance (COLA) and full funding for student population growth. Proposed funding reductions included in the Governor's January Budget are incorporated in the Ending Fund Balance section of our Plan as mentioned previously.

The recent histogram of the School's Categorical Funding, per Unit of ADA, including funding projections for the next five fiscal years, follows (the current year is highlighted in grey):

**Categorical Program Funding per ADA,  
Actual Plus Projected Rates**

Year	COLA	Grades K-3	Grades 4-6
2001-02	1.90%	\$ 309	\$ 317
2002-03	1.66%	\$ 198	\$ 204
2003-04	1.90%	\$ 198	\$ 204
2004-05	2.80%	\$ 204	\$ 210
2005-06	3.10%	\$ 210	\$ 217
2006-07	3.10%	\$ 217	\$ 224
2007-08	2.60%	\$ 223	\$ 230
2008-09	2.60%	\$ 229	\$ 236

*data valid as of 02/25/03*

4. **Special Education Program**

The School's Special Education pupil population is reported to the State twice a year in December and in May. A running multiyear histogram of the School's December Special Education population will be maintained as shown below. BSC would project that its Special Education student count will approximate 10%, similar to the Los Altos School District.

2003-2004	2004-2005	2005-2006	2006-2007	2007-2008
Number of Students				

5. **Summer School Enrichment and Hourly Remedial Programs** — For the 2003-2004 school year, no summer school programs are projected. Currently there are five separate types of hourly programs each with a different set of rules, regulations, and criteria for funding. There is no mandate to offer summer programs. A summer program will be considered in future years as will the other optional hourly instructional programs. Currently the state's focus on hourly program funding is for students at risk and thus few of our students would qualify for the majority of the hourly programs.

6. **State Categorical Programs** — have individual, unique parameters or qualifications. A brief description of the program along with estimated program funding for 2003-2004 through 2007-2008 follows. The funding rate estimates are of March 2003. These rates will be updated as other information is available. School participation for each program is indicated below.

- **In Lieu of Economic Impact Aid** — based upon number of pupils enrolled who are limited English proficient and/or eligible for subsidized meals. The estimated per pupil rate for 2003-2004, as of mid March 2003, is \$110.

- Participation: Yes  or No

- **Class Size Reduction** — based upon a student:teacher ratio of 20:1 in Grades K-3, with a local decision as to which grades are selected. This Budget assumes a full year program, and class size reduction at all four eligible grade levels, with full day participation at \$902 per pupil.

- Participation: Yes  or No

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Primary Class Size Reduction Revenue factors, plus projected funding for the next four years, as of March 2003, follows:

Year	Full Day Program	Half-Day Program
2002-2003	\$ 906	\$ 427
2003-2004	\$ 906	\$ 427
2004-2005	\$ 931	\$ 439
2005-2006	\$ 960	\$ 453
2006-2007	\$ 990	\$ 467
2007-2008	\$ 1,067	\$ 479

- **Instructional Time and Staff Development 'Buy Back' Reform** – based on \$299 per day per certificated staff member with maximum of 3 days; \$152 per day for non-certificated staff, maximum 1 day.

- Participation: Yes  or No

Instructional Time and Staff Development Buy Back Reform funding, plus the projected funding for the next four years, as of March 2003, follows:

Year	Certificated Staff — 3 Day Maximum	Non-Certificated Classroom Staff — 1 Day Maximum
2002-2003	\$ 299	\$ 155
2003-2004	\$ 299	\$ 155
2004-2005	\$ 307	\$ 159
2005-2006	\$ 317	\$ 164
2006-2007	\$ 327	\$ 169
2007-2008	\$ 336	\$ 173

- **School Instructional Materials** — are based upon \$ 57 per enroll for Grades K-6, with use of funds limited to state approved texts and instructional materials. The funding for this and the next three state categorical programs is uncertain and thus the funds, while included in the revenue budget are not included in the School's expenditure plan. The funds are currently placed in a Restricted Account in the Fund Balance section of the Budget Plan.

- Participation: Yes  or No

- **School Language Arts - Reading Materials** — is a second categorical program whose funding is uncertain. The projected funding is \$ 16.25 per pupil with the funds included in both revenue and restricted fund balances.

- Participation: Yes  or No

- **School Library Materials** — is a third categorical program whose funding is uncertain. The projected funding is \$ 32.50 per pupil with the funds included in both revenue and restricted fund balances.

- Participation: Yes  or No

- **English Language Acquisition** — based upon \$100 per participating student. Application lead-time requirements may preclude a school from participating its first year of operation.

- Participation: Yes  or No

- **Tobacco Use Prevention** — is based upon \$6.00 per ADA in grades 4 to 8.

- Participation: Yes  or No

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- **Charter School Facilities** — reimbursement for up to 75% of facility costs, with maximum of \$ 750 per student; participation and funding has been directed to schools with a high proportion of at risk students. BCS will apply for these funds when and if they become available.
  - Participation: Yes \_\_\_ or No
- **E-Rate Universal Service and California Teleconnect Funds** — are based upon sliding scale reimbursement program with socio-economic community factory primary criteria. Program funds are probably not available to school in its first year of operation.
  - Participation: Yes \_\_\_ or No
- **Lottery** — based upon estimate provided by School Services of California, January 2003 estimate, is \$ 117/ADA for General Purpose plus an additional \$ 13/ADA for instructional materials. Funding based on prior year annual ADA. Estimate to be updated at First, Second, and Third Interim Reporting periods. These funds are unavailable to start up schools.

Per ADA lottery amounts paid for prior years funding, and those projected per ADA for future years are as follows:

Year	Unrestricted Amount	Instructional Material Amount	Total Lottery per ADA
2001-2002	\$ 123	\$ 18	\$ 141
2002-2003	\$ 115	\$ 12	\$ 127
2003-2004	\$ 114	\$ 12	\$ 126
2004-2005	\$ 109	\$ 13	\$ 122
2005-2006	\$ 109	\$ 13	\$ 122
2006-2007	\$ 105	\$ 13	\$ 118
2007-2008	\$ 108	\$ 13	\$ 121

- **Mandated Cost** — will be based upon prior year three-year actual funding plus or minus any one-time anomalies. There is generally a significant time lag between time expenses incurred and funds reimbursed. While no revenues are included in this first Budget Projection, this revenue source will be pursued for future years.

The proposed funding for 2003-2004 through 2007-2008 is as follows:

2003-2004	2004-2005	2005-2006	2006-2007	2007-2008
	Future consideration	Future consideration	Future consideration	Future consideration

- **All Other State Revenue** — will be based upon prior year three-year actual funding plus or minus any one-time anomalies. Until the historical base is established, each additional funding item will be identified with specificity.

**Federal Revenues**

**Federal Revenues** — per specific program variables as identified below. In addition to the general update schedule identified above, federal revenues are to be updated when Federal entitlement notification received; funding not appropriated until entitlement notification is received. Funding revenue projections are as of March 2003.

The majority of federal revenues are earmarked for students with significant educational need as demonstrated in testing programs as well as for students with low socio-economic family characteristics. Funding will compliment the goals identified in No Child Left Behind federal plans.

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There generally are significant compliance features associated with federal funding.

Adjustments to the Federal Funding Revenues will be made as soon as updated information is received.

- Title I – Compensatory Education – based upon formula for students qualifying for free and/or reduced meals; amount per student \$ 600 base, plus additional ‘add-ons’.
  - Participation: Yes \_\_\_ or No
- Title II – Staff Development – based upon eligibility criteria of Title I; amount \$ 2.25 per student enrolled plus \$ 0.17 per Title I dollar received.
  - Participation: Yes \_\_\_ or No
- Title IV – Safe and Drug Free Schools – based upon eligibility criteria of Title I, amount \$ 4.00 per student.
  - Participation: Yes \_\_\_ or No
- Title VI – Innovative Programs – based upon eligibility criteria of Title I, amount \$ 4.85 per student, plus additional funds for welfare dependent students, minimum grant, \$ 3,500.
  - Participation: Yes \_\_\_ or No
- Title VI – Class Size Reduction – based upon eligibility criteria of Title I; complex formula to determine funding; funding eligibility linked to student poverty and enrollment data.
  - Participation: Yes \_\_\_ or No

**Local Revenues**

1. **Local Revenue** will be based primarily on past historical receipts. Generally an average of three years’ receipts integrating actual receipts will be used for budget projections. Until the historical base is established, specific data will be provided each projected funding source.
2. **Local Donation and Grant Funds** are budgeted as follows:

The Bullis Charter School community has a proven track record of significant financial support for their students. Two such sources of local support are included in the Donations section of the Budget Plan: the school Parent-Teacher Association (PTA), and the Bullis-Purissima Charter School Foundation.

These sources are projected to raise funds of approximately \$ 1,800 per student per year, with 3% annual growth commencing in the third year of the multi-year budget.

Some of the planned fund-raising activities are: an annual Fall Walk-a-thon, and an annual Spring Auction.
3. **Interest on Funds on Deposit in County Treasury** — based upon cash flow projected average monthly balance (principal) and yield rate estimate provided by County Office.
  - **Tax and Revenue Anticipation Note (TRAN) Size** – BCS would seek to negotiate with the School District to participate in the District’s annual cash flow borrowing.
4. **General Obligation Bond Facility Funding** — funds are restricted for capital purposes and may not be used for operations. Funding allocations for BCS are unknown at this time and are subject to negotiation.



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Year	Amount	Capital Projects
2003-2004		
2004-2005		
2005-2006		
2006-2007		
2007-2008		
<b>Total</b>		

5. **Parcel Tax Funding** – funds are restricted for purposes identified on the ballot at the time the parcel tax was approved by the voters. Funding allocations for BCS are unknown at this time and are subject to negotiation.

Year	Amount	Approved Projects
2003-2004		
2004-2005		
2005-2006		
2006-2007		
2007-2008		
<b>Total</b>		

**Expenditure Factors**

Charter Schools, similar to all other educational agencies in California, are labor intense organizations. When developing and monitoring charter school budgets, the greatest emphasis is placed on defining the parameters for hiring staff and determining the appropriate employee costs factors, including salary and related benefit or payroll costs. A system of 'Position Control' in which site staffing is linked to student enrollment is recommended so that a balance is maintained between personnel costs and student population, the factor on which school revenues are determined.

School Site Staffing is a most critical component of Budget Development. The primary facilitator in instruction is the Classroom Teacher. The allocation of teaching positions is one of the most important budget management functions.

**POSITION CONTROL:** A system of Position Control is by far the most effective way to budget and manage personnel costs in a school district as approximately 85%+ of a typical school district's annual expenditures are devoted to salaries and benefits. Conceptually, Position Control is quite simple.

The underlying idea is that *positions*, not employees, are the basic building blocks for each year's personnel budget. With position control, a roster of specific full-time equivalent 'FTE' "slots" are established in the budget and assigned budget codes to determine what program, department, location, and fund will be paying for that position. By policy, only the Governing Board, or the School Principal as delegated by the Board, can create or delete positions.

Once the master list of authorized positions has been set up in the budget, the control aspect of position control comes into play. An employee cannot be hired and put on the payroll unless a valid, vacant position is available. Thus recruitment and hiring only take place when a known position vacancy exists. If the new employee costs more or less than the amount already in the budget for that position, the budget is revised accordingly.

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The above description represents the ideal, but few California school districts actually operate that way. Full implementation of position control required the close coordination of personnel, payroll and budget activities, and also requires that there be a common data system, or integrated data systems, serving these three areas. Unless the personnel, payroll, budget and accounting systems are all built around the logic of positions as entities separate from employees, there will be gaps and weaknesses in position control.

**Salary Factors**

Based upon positions authorized by BCS Governing Board and incorporated into Position Control System. Salary placement per individual staff experience and student responsibility factors determine salary placement. All staff salaries based upon approved salary schedules and individual employment contract terms and conditions. Annual anniversary increments included for all staff that qualify. Vacant and growth positions estimated at average cost factor per applicable unit. Sick and personal necessity leave estimated at 5.0 days per employee per year. Budgets are developed using 10 days per teacher for substitute costs.

1. **Certificated Employees - School Site Personnel** - based upon enrollment projections. Formula entitlement sheets, by site, for teaching posts are included as **Appendix A**. Separate entitlement sheets are provided for each regular and alternative education program.

For all years of the Budget Projection, grades Kindergarten through Third are staffed with one teacher for each 20 students. Students in grades Four to Six are staffed with twenty-five students for each teacher.

Projected School Site Teacher Staffing					
Grade Level	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008
Kindergarten	1	2	2	2	2
First	1	2	2	2	2
Second	1	2	2	2	2
Third	1	2	2	2	2
Fourth	1	2	2	2	2
Fifth	1	2	2	2	2
Sixth	1	2	2	2	2
<b>Total</b>	<b>7</b>	<b>14</b>	<b>14</b>	<b>14</b>	<b>14</b>

Teacher salaries are budgeted based upon actual staff salaries; vacant positions are budgeted based upon estimated average cost of new hire. Teachers will be paid according to the BCS pay scale, as developed by the School Site Leadership Team, and approved by the Governing Board.

Base salary is the salary for the average seven-hour workday. The projected salary cost for future years includes a 5% increase.

Projected average annual salary costs per teacher - first five years of operation					
	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008
Base Average Salary	\$ 61,200	\$ 64,260	\$ 67,473	\$ 70,847	\$ 74,389

Teacher Substitute Provisions are included for both projected sick and personal leave as well as for professional staff development leave. 5 days per year per teacher are projected for sick and personal leave and an additional 5 days per year are projected per teacher for professional staff development. The projected cost factor is \$220 per day for the first year with a \$5 per day increase thereafter.

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**2. School Site Teacher Staffing Ratios for Other Programs**

<b>Full Time Equivalent Teaching Posts for Special Enrichment Programs</b>					
<b>Educational Enrichment</b>	<b>2003-2004</b>	<b>2004-2005</b>	<b>2005-2006</b>	<b>2006-2007</b>	<b>2007-2008</b>
Art	0.2	0.4	0.4	0.4	0.4
Math	0.2	0.4	0.4	0.4	0.4
Music	0.2	0.4	0.4	0.4	0.4
Physical Education	0.2	0.4	0.4	0.4	0.4
Science	0.2	0.4	0.4	0.4	0.4
Librarian	0.0	0.4	0.4	0.4	0.4
<b>Total Positions</b>	<b>1.0</b>	<b>2.4</b>	<b>2.4</b>	<b>2.4</b>	<b>2.4</b>

Compensation Parameters for Education Enrichment Programs are scheduled to be based on the projected average teacher salary cost per year.

3. **Certificated Employees – Site Administrative Personnel** - based upon a School Principal with an annual first year salary of \$110,000. Annual increases of 5% are projected in the budget plan.
4. **Classified Employee** – are staff whose jobs do not require a teaching credential. Based upon the March 2003 staffing parameters, the following positions are projected for the five-year budget period:

<b>Full Time Monthly Classified Support Staff</b>					
<b>Position</b>	<b>2003-2004</b>	<b>2004-2005</b>	<b>2005-2006</b>	<b>2006-2007</b>	<b>2007-2008</b>
School Secretary	1.0	1.0	1.0	1.0	1.0
School Custodian	0.0	1.0	1.0	1.0	1.0
Custodian/Maintenance	1.0	0.0	0.0	0.0	0.0
Maintenance	0.0	0.5	0.5	0.5	0.5
Computer Specialist	0.4	0.8	0.8	0.8	0.8
<b>Total Positions</b>	<b>2.4</b>	<b>3.3</b>	<b>3.3</b>	<b>3.3</b>	<b>3.3</b>

In addition, the School's budget plan includes the hiring of hourly classified support staff to compliment the staff as instructional aides and to serve student health needs.

**Classified Staff Compensation and Work Year Assignments** – The School Secretary, Computer Specialist, and Health and Instructional Aides are projected to work the same schedule as the Teacher, or a 10 month calendar. The School Custodian and Maintenance staff are projected to work a 12 month calendar to ensure that the classrooms are ready at all times for students and teachers.

**Salaries for Classified Personnel** – are projected on an annual base, per position. A 5% salary cost increase factor is included in the multi year projection. The basic salary, for each position, based upon a 12 month work schedule follows:

<b>Site Staff Salary Costs</b>					
<b>Ordinal Year</b>	<b>Year I</b>	<b>Year II</b>	<b>Year III</b>	<b>Year IV</b>	<b>Year V</b>
<b>Fiscal Year</b>	<b>2003-04</b>	<b>2004-05</b>	<b>2005-06</b>	<b>2006-07</b>	<b>2007-08</b>
Computer Specialist	\$ 54,000	\$ 56,700	\$ 59,535	\$ 62,512	\$ 65,638
Custodian	\$ 38,400	\$ 40,320	\$ 42,336	\$ 44,453	\$ 46,676
Maintenance/Custodian	\$ 40,800	\$ 42,840	\$ 44,982	\$ 47,231	\$ 49,593
Maintenance	\$ 43,200	\$ 45,360	\$ 47,628	\$ 50,009	\$ 52,509
Secretary	\$ 40,800	\$ 42,840	\$ 44,982	\$ 47,231	\$ 49,593
Other (Identify)	\$ -	\$ -	\$ -	\$ -	\$ -

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1. **Employee Benefits - Statutory Benefits** - determined by either state or federal mandate are based on current rate factors. Statutory benefits are cost factors applied to the salary factor. These benefits differ by type employee: certificated and classified and by the period of time they work: full-time, part-time and hourly. The projected cost factors for 2003-2004 are:

<b>CERTIFICATED EMPLOYEES</b>			
	Regular Employees	Substitute Employees <sup>1</sup>	
		(regular)	(STRS)
State Teachers' Retirement System	8.25%	varies	varies
Medicare	1.45%	1.45%	1.45%
Unemployment Insurance	0.08%	0.08%	0.08%
Workers' Compensation Insurance	2.50%	2.50%	2.50%
Social Security	6.45%		
<b>Total</b>			

<b>CLASSIFIED EMPLOYEES</b>		
	Full-time and Part-time Employees working More than 20 Hours/Week	Part-time Employees Working Less than 20 Hours/Week and Substitutes
	Public Employees Retirement System	13.02%
Social Security	6.45%	6.45%
Medicare	1.45%	1.45%
Unemployment Insurance	0.08%	0.08%
Workers' Compensation	2.50%	2.50%
<b>TOTAL</b>		

2. **Employee Benefits - Discretionary Benefits or Health Benefits** are structured on an employee discretionary allowance each year. These benefits are based on a 'Cafeteria Plan' also known as an IRS 125. Each year the employee will have the basic salary plus a benefit allowance that will be totaled for a total compensation amount. Each individual employee will then have the choice as to how to allocate or spend the benefit allowance on a pre-tax basis.

In the Multi Year Budget Plan both the average salary and the basic benefit allowance are projected to increase by 5% annually. The base employee benefit allowance for staff who work 4 or more hours per day for 2003-2004 is \$8,400. A chart showing the annual projected teacher salary and the employee benefit allowance, the primary components of total compensation, are shown for the five-year budget period:

<b>Teacher Salaries and Benefit Factors</b>					
Ordinal Year Fiscal Year	Year I	Year II	Year III	Year IV	Year V
	2003-04	2004-05	2005-06	2006-07	2007-08
Teacher Salary	\$ 61,200	\$ 64,260	\$ 67,473	\$ 70,847	\$ 74,389
Benefit Factor	\$ 8,400	\$ 8,820	\$ 9,261	\$ 9,724	\$ 10,210
<b>Total Compensation</b>	<b>\$ 69,600</b>	<b>\$ 73,080</b>	<b>\$ 76,734</b>	<b>\$ 80,571</b>	<b>\$ 84,599</b>

<sup>1</sup> Substitute employees qualify either for Social Security or for State Teachers' Retirement System benefits depending upon individual employee selection

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The Total Compensation structure will be utilized for all school employees.

3. **Text Book and Instructional Material Allocations** -- along with operating supplies for BCS are provided from two major sources: the School's general resources and from projected categorical funds from the state. The state's program, while in a flux situation, is projected to provide approximately \$106 per student the first year, with a 3% increase in subsequent years. There are generally restrictions on how the state funds may be used and BCS will ensure that the state funds are spent in accord with the state's guidelines.

The local support funding support for instructional supplies, textbooks and office supplies will be allocated on a combination of a per pupil allowance and a per teacher allocation. The five-year budget projection for all Books and Supplies is:

Total Compensation	\$ 69,600	\$ 73,080	\$ 76,734	\$ 80,571	\$ 84,599
<b>Books &amp; Supplies</b>					
Ordinal Year Fiscal Year	Year I 2003-04	Year II 2004-05	Year III 2005-06	Year IV 2006-07	Year V 2007-08
Textbooks	\$ 8,025	\$ 16,050	\$ 16,050	\$ 16,050	\$ 16,050
Other Books	3,375	6,750	6,750	6,750	6,750
Supplies					
Custodial	775	1,550	1,550	1,550	1,550
Instructional Supplies	4,425	8,850	8,850	8,850	8,850
Office Supplies	2,600	5,200	5,200	5,200	5,200
Postage and Shipping	1,550	3,100	3,100	3,100	3,100
Misc Equip Replacement	-	10,500	10,500	10,500	10,500

4. **Other Operating Expenses and Services** - are based upon the projected cost factors and preliminary negotiations with prospective service providers. Certain cost factors, such as the Oversight Fee and the Facility Rental Fee are based on provisions of state law. Oversight Fees are based on 1% of revenues, excluding those revenues locally raised by the BCS community. Similarly the Facility Rental Fee is based on 2% of revenues, excluding the locally raised funds. The district, under the parameters of Proposition 39, must consider the BCS facility request for basic facility and equipment.

The Special Education Encroachment amount is based upon the prevalent arrangement between sponsor school districts and charter schools for the excess costs of special education services. In the statewide model, the district retains all special revenues for special education and provides all special education services to charter school students. In exchange, the charter school pays to the district the per pupil encroachment amount computed on a districtwide basis. This encroachment factor is applied to the total school population. Per the district's 2002-2003 budget book, the per student encroachment has grown from \$118 per student in 1997-1998 to an estimated amount of \$350 per student in 2002-2003. The projected special education encroachment per pupil amount included in BCS budget projection provides for a 10% compound cost factor increase per year. The annual projected encroachment factor is \$385 in Year I and grows to \$587 per pupil in Year V.

BCS has provided for all business service costs, including budget development, budget management, accounting, financial reporting, accounts payable, accounts receivable, payroll and retirement reporting and coordination through an outside vendor that specializes in public school fiscal management. The projected cost for this service is on a per pupil factor and begins at \$175 per pupil per year. A 3% inflation allowance has been provided for subsequent years.

The multi-year cost projection for all Operating Services for the five year period is:

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Program	2003-	2004-	2005-	2006-	2007-
Professional Development	\$4,000	\$8,400	\$8,820	\$9,264	\$9,732
Dues and Memberships	\$3,000	\$3,150	\$3,308	\$3,473	\$3,647
Liability Insurance	\$10,800	\$11,340	\$11,904	\$12,504	\$13,128
Equipment Rental	\$7,200	\$14,400	\$14,400	\$14,400	\$14,400
Facility Rental - District	\$25,345	\$33,972	\$35,387	\$36,439	\$37,567
Audit Services	\$6,000	\$9,000	\$9,000	\$9,000	\$9,000
Business Services	\$27,125	\$55,490	\$56,730	\$58,280	\$59,830
Oversight Services - District	\$12,673	\$16,986	\$17,694	\$18,219	\$18,783
Legal Services	\$10,800	\$11,124	\$11,460	\$11,808	\$12,168
Special Education Encroachment	\$59,675	\$131,440	\$144,460	\$159,030	\$174,840
Software License - Student	\$1,550	\$3,193	\$3,289	\$3,388	\$3,491
Student Testing and Assessment	\$4,000	\$8,215	\$8,525	\$8,835	\$9,145
Utilities	\$50,400	\$52,920	\$55,572	\$58,356	\$61,272
<b>Total Expenses</b>	<b>\$222,568</b>	<b>\$359,630</b>	<b>\$380,549</b>	<b>\$402,996</b>	<b>\$427,003</b>

5. **Capital Outlay for Unrestricted General Fund purposes** — based upon start up cost projections for Year I are included. The projected cost of basic classroom furniture including desks, chairs, tables, and carts for both student and teacher is estimated at \$4,500 per classroom. An additional \$10,000 has been included for the combined school office and library equipment. Years II and beyond will be requested from the District per the parameters of Prop 39.
6. **Ending Balance** — based upon concept that adequate ending fund balances shall be provided to enable the School to maintain reserves as indicated in reserve section of budget assumptions.

**General Fund Reserves** — based upon the following parameters:

- **Reserve for Economic Uncertainty** — greater of \$50,000 or 3.0%, with intent to raise to 5%
- **One Time Reserve Balances** — and Undistributed Reserve have been built into the BCS' Budget Plan to mitigate the impact of state funding adjustments for 2003-2004 and future years. These Reserves will be monitored constantly and adjusted and refined as decisions and updates are provided relative to state funding amounts.

Section

**D**

**Budget Responsibility Matrix**

**Intent of Responsibility Matrix**

The Intent of the Budget Responsibility Matrix is to identify, from the perspective of *Best Practices*, the most significant components of Budget Development and Budget Management and to specific 'who' – the specific staff position or group is responsible for the product or action.

**Major Areas of Budget Responsibility Matrix**

The Responsibility Matrix identifies eleven major areas of Budget Development and Budget Responsibility for which specific action by specific individual(s) or group(s) is recommended. The Areas of Budget Responsibility include:

- ⇒ Budget Calendar
- ⇒ Budget Guidelines
- ⇒ Budget Assumptions
- ⇒ Charter School Goals and Strategic Fiscal Plan
- ⇒ Multi-Year Financial Projections
- ⇒ Preliminary Budget
- ⇒ Annual Budget Adoption
- ⇒ Review and Re-adoption of Annual Budget
- ⇒ Preparation and Distribution of Final Budget
- ⇒ Mid-Year Budget Reviews and Updates
- ⇒ Miscellaneous Related Tasks

**Major Staff Positions or Groups Responsible for Budget Functions**

Budget Responsibilities are indicated for the following positions or groups associated with the Charter School and its fiscal management. Note that for certain positions, such as Chief Personnel Officer, the function may be assumed by the party providing general business services for the Charter School. The function is segregated, however, in the event that a person in the future is assigned that specific responsibility. If the School Principal or other administrative officer does perform a function that is noted under another position, it is important for the administrative officer to 'put on the hat' of the other position to ensure that the perspective of the post is represented in the action being reviewed or taken.

Seven different positions or groups are identified for specific fiduciary responsibilities related to Budget Development and Budget Management. The positions and groups are:

- ⇒ Governance Board
- ⇒ School Principal

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- ⇒ Chief Business Officer
- ⇒ Chief Personnel Officer
- ⇒ Staff, Parent and Community Groups
- ⇒ Sponsor Agency Fiscal Oversight Officer

A brief description of each of these positions or groups follows:

**Governance Body** is the Board of Directors that has fiduciary responsibility for the governance of the Charter School. In the narrative of this section, this group is referenced as the 'Board.'

**School Principal** is the lead administrator for the Charter School.

**School Principal's Administrative Cabinet** is the formal or informal group of key staff advisors who meet regularly with the School Principal to discuss and set school management and operational policies and guidelines.

**Chief Business Officer** is the staff person who has major hands on day-to-day responsibilities for the financial management of the Charter School. This individual is intended to be a Member of the School Principal's Administrative Cabinet. If this function is provided by an outside agent or agency, a representative of that group should be available 24 hours/day, 7 days a week to the School Principal.

**Chief Personnel Officer** is the staff person who has major hands on day-to-day responsibilities for the personnel or human resource management of the Charter School. This individual is intended to be a Member of the School Principal's Administrative Cabinet. If this function is provided by an outside agent or agency, a representative of that group should be available 24 hours/day, 7 days a week to the School Principal.

**Staff, Parent and Community Group Members** are primary stakeholders in the Charter School. Responsibilities assigned or noted for this group are primarily advisory. Their input and advice on key budget and fiscal matters, while advisory, is essential to the success of the Charter School and is critical to the success of the School.

**Sponsor Agency Fiscal Oversight Officer** is the Chief Financial Officer, or designee, of the sponsoring Los Altos School District. Discussion and agreement between the Charter School Principal and the District Chief Financial Officer on the specific components of the Fiscal Oversight functions, including a calendar of events for data transfer, etc. is recommended.

#### **Implementation of Budget Responsibility Matrix**

The Charter School will refine the Budget Responsibility Matrix during the Spring. The School will update the draft Responsibility Matrix and plans to have a final Matrix that it will incorporate in its Business Services' Governance Board Policies before Summer 2003. The Responsibility Matrix will be reviewed for functionality each time the School enters a major budget cycle.



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**BUDGET DEVELOPMENT CALENDAR MATRIX**

<b>ACTION or PRODUCT</b>	<b>Governance Board</b>	<b>School Principal</b>	<b>School Principal's Cabinet</b>	<b>Chief Business Officer</b>	<b>Chief Personnel Officer</b>	<b>Parent and Community Groups</b>	<b>District Fiscal Oversight Officer</b>
<u>Charter School Goals-Strategic Fiscal Plan</u>							
1. Initiate Goal Setting Process	✓	✓					
2. Review Status of Prior Year Goals	✓	✓	✓			✓	
3. Review Financial Projection to Identify Potential Funding for Goals	✓	✓	✓	✓			✓
4. Prepare Draft Goals for Coming Year (and Multi-Years)	✓	✓	✓			✓	
5. Estimate Cost (or Savings) Associated with Implementing Each Draft Goal				✓			
6. Establish Level (and Source) of Funds to be Generated and/or Set Aside for Goals	✓	✓		✓			
7. Set Priorities, Allocate Funds and Adopt Goals to be Implemented	✓	✓					
8. Publicize/Distribute Information Regarding Adopted Goals to Interested Groups		✓					

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**BUDGET RESPONSIBILITY MATRIX**

ACTION or PRODUCT	BUDGET RESPONSIBILITY MATRIX					
	Governance Board	School Principal	School Principal's Cabinet	Chief Business Officer	Chief Personnel Officer	Parent and Community Groups

**Budget Calendar**

- |   |   |  |   |   |   |   |
|---|---|--|---|---|---|---|
| 1. Review Previous Calendar and Prepare Draft for Coming Year   |   |  |   | ✓ |   |   |
| 2. Review/Approve Draft Calendar  | ✓ |  | ✓ |   |   | ✓ |
| 3. Finalize Draft Calendar  | ✓ |  |   |   |   |   |
| 4. Revise/Adopt Budget Calendar   |   |  |   |   |   |   |
| 5. Produce Final Calendar and Develop Summary Version Highlighting Key Activities, Dates and Responsibilities |   |  |   | ✓ |   |   |
| 6. Distribute Detail and/or Summary Calendars to Employees, Parents and Community as Appropriate              |   |  |   |   | ✓ |   |

**Budget Guidelines**

- |   |   |  |   |   |  |  |
|---|---|--|---|---|--|--|
| 1. Review Previous Guidelines and Prepare Draft for Coming Year               |   |  |   | ✓ |  |  |
| 2. Review/Approve Draft Guidelines  | ✓ |  | ✓ |   |  |  |
| 3. Finalize Draft Guidelines  | ✓ |  |   |   |  |  |
| 4. Revise/Adopt Budget Guidelines   |   |  |   |   |  |  |
| 5. Distribute Guidelines to Employees, Parents, and Community, as Appropriate | ✓ |  |   |   |  |  |

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**BUDGET RESPONSIBILITY MATRIX**

ACTION or PRODUCT	Governance Board	School Principal	School Principal's Cabinet	Chief Business Officer	Chief Personnel Officer	Parent and Community Groups	District Fiscal Oversight Officer
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**Budget Assumptions**

1. Review Previous Assumptions and Prepare Update for Next Budget Cycle ✓
2. Review and Update Each Key Variable: Enrollment, Average Daily Attendance, Beginning Balance, Revenue, Expenditures, Transfers, Ending Balance, Reserves, Debt, and Cash Flow ✓
3. Review and Update, at Minimum: January Governor's Budget Proposal, February Apportionment Certification, May Revise, State Adopted Budget, Interim Budget Updates as of End of October, December and March ✓
4. Revise and Adopt Assumption Updates ✓
5. Distribute Assumptions to Employees, Parents and Community, as Appropriate ✓

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**BUDGET RESPONSIBILITY MATRIX**

ACTION or PRODUCT	BUDGET RESPONSIBILITY MATRIX						
	Governance Board	School Principal	School Principal's Cabinet	Chief Business Officer	Chief Personnel Officer	Parent and Community Groups	District Fiscal Oversight Officer

Multi-Year Financial Projections

- |   |   |   |  |   |   |  |   |
|---|---|---|--|---|---|--|---|
| 1. Review and Update Most Recent Previous Projection for Current Budget and Two Succeeding Years                |   |   |  | ✓ |   |  |   |
| 2. Issue Revised Projection Showing New Revenue, Expenditures, Reserve Balances and Identifying Key Assumptions |   |   |  | ✓ |   |  | ✓ |
| 3. Review/Discuss Revised Projection  | ✓ |   |  |   | ✓ |  |   |
| 4. Publicize/Distribute New Projection to Set Tone for Upcoming Budget Development Process                      | ✓ | ✓ |  |   |   |  | ✓ |

Detailed Preliminary Budget

- |  |  |  |  |   |  |  |  |
|--|--|--|--|---|--|--|--|
| 1. Establish Detailed, Computer-Based Budget Planning File that Reflects the Impact of Charter School Goals, Budget Guidelines and the January Financial Projection for the Next Fiscal Year |  |  |  | ✓ |  |  |  |
| 2. Determine Charter School-wide "Target" Reduction <i>or</i> Augmentation Level <sup>2</sup>  |  |  |  | ✓ |  |  |  |

<sup>2</sup> Express as a Dollar Amount and as a Percentage of the Projected Unrestricted Expenditure Budget Total

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**BUDGET RESPONSIBILITY MATRIX**

<b>ACTION or PRODUCT</b>	Governance Board	School Principal	School Principal's Cabinet	Chief Business Officer	Chief Personnel Officer	Parent and Community Groups	District Fiscal Oversight Officer
3. Issue Internal Budget worksheets to Programs Managers with Instructions on Cut/Add Process for Future Prioritization Process	✓			✓			
4. Complete Budget Worksheets and Cut/Add Priorities			✓	✓			
5. Update Budget Planning File with Worksheet Data and Produce Object and Program Summaries				✓			
6. Review Preliminary Budgets and Cut/Add Priorities		✓					✓
7. Rank/Cut/Add Priorities and Recommend Allocation Levels to School Principal			✓				
8. Prepare Recommended Cut/Add Priorities and Allocation Levels for Review		✓		✓			
9. Review of School Principal's Recommendations							
10. Hold Community Meetings to Publicize and Receive Input Regarding Recommendations		✓		✓		✓	
11. Hold Board Discussion and Provide Requests for Addition Information	✓						

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**BUDGET RESPONSIBILITY MATRIX**

ACTION or PRODUCT	BUDGET RESPONSIBILITY MATRIX						
	Governance Board	School Principal	School Principal's Cabinet	Chief Business Officer	Chief Personnel Officer	Parent and Community Groups	District Fiscal Oversight Officer
12. Respond to Board Requests	✓						
13. Preliminary Approval of Cut/Add Priorities and Allocation Levels	✓						
14. Adopt Cut/Add Priorities, Contingency Lists, and Preliminary Allocation Levels	✓						
15. Update Financial Projection to Conform to "May Revise"				✓			
16. Produce Preliminary Budget Incorporating All Approved Changes				✓			
17. Publicize/Distribute Preliminary Budget Document and/or Summary Information as Appropriate		✓		✓			
<b><u>Annual Budget Adoption</u></b>							
1. Review and React to Preliminary Budget Document			✓			✓	✓
2. Incorporate/Note Necessary Revisions and Corrections		✓		✓			
3. Discuss/Revise Budget	✓						
4. Hold Public Hearing	✓			✓			
5. Adopt Budget	✓						
6. Transmit Budget to District		✓		✓			✓

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**BUDGET RESPONSIBILITY MATRIX**

ACTION or PRODUCT	Governance Board	School Principal	School Principal's Cabinet	Chief Business Officer	Chief Personnel Officer	Parent and Community Groups	District Fiscal Oversight Officer
<u>Revise/Re-Adopt Budget</u>							
1. Update Revenue to Integrate Adopted State Budget	✓			✓			
2. Update Budget Planning File to Reflect Actual Balances from Prior Year				✓			
3. Receive District's Comments on Adopted Budget	✓	✓		✓			
4. Review Cut/Add Priorities to Conform Budget to Updated Revenue, Beginning Balance Update, and Sponsor District's Comments		✓	✓	✓		✓	✓
5. Recommend Further Cuts/Adds to be Implemented		✓					
6. Revise/Re-Adopt Budget	✓						
7. Transmit Revised/Re-Adopted Budget to District		✓		✓			
8. Prepare, Review and Approve Interim Budget Updates	✓	✓		✓			

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**BUDGET RESPONSIBILITY MATRIX**

<b>ACTION or PRODUCT</b>	<b>Governance Board</b>	<b>School Principal</b>	<b>School Principal's Cabinet</b>	<b>Chief Business Officer</b>	<b>Chief Personnel Officer</b>	<b>Parent and Community Groups</b>	<b>District Fiscal Oversight Officer</b>
<b><u>Prepare/Distribute Final Budget Document</u></b>							
1. Draft/Review Narrative, Charts and Graphs for Inclusion in Document	✓	✓	✓	✓			
2. Produce Document in Accord with Governance Body's Budget Guidelines				✓			
3. Publish Document and Distribute to Employees, Parents and Community Groups		✓		✓			
<b><u>Miscellaneous Related Tasks</u></b>							
1. Prepare/Revise Fiscal Policy Committee Bylaws and Operating Procedures	✓						
2. Provide Budget Development Orientation for New Governance Body Members and/or Fiscal Policy Team Members	✓			✓			
3. Provide Training for Key Staff and Others Concerning Budget Management Issues (i.e., New Legislation, etc.,)		✓					
4. Other: (Identify)							



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Section  
**E**

**Budget Calendar**

A well-defined Budget Calendar with specific date's indices for each and every major budget component is a significant step in the process to ensure accountability and long-term fiscal solvency for an organization. The identification of 'what happens when' is an essential road map for any successful organization. The Budget Calendar first identifies, at a summary level, the major phases of the Budget Development:

The draft Budget Calendar has been developed for Bullis Charter School using the thesis that there would be four major budgets presented to the Governance Board and the community during the budget development process and that there would be two mandatory formal interim reports. In addition, the School's Budget Plan includes the preparation and presentation of an Option Third Interim Report after the Second Period Attendance data has been determined.

Phase	Key Variables	Date
Phase I	Preliminary Enrollment Projections Governor's Proposed Revenue Allocations Local Preliminary Expenditure Goals, Guidelines & Assumptions Defined	January
Phase II	Updated Enrollment Projections Revise to Governor's Revenue Projections by Department of Finance Local Beginning Balance Estimate Updated	May
Phase III	School Revenue Updated to Final State Budget, provided that the State Budget has been chaptered School Expenditure Plan Updated School Program Plans Updated Local Beginning Balance Updated	June
Phase IV	School Revenue Updated to Final State Budget School Expenditure Plan Updated School Program Plans Updated Local Beginning Balance Updated	45 Days After State Budget Adopted
Phase V	First Interim Report Second Interim Report Optional Third Interim Report	45 days after Oct 31 45 days after Jan 31 45 days after Mar 31

The second Budget Calendar includes in much greater detail the individual steps involved in the continual monitoring of the Charter School's budget plans. Presentation of and incorporation of such a process is an excellent tool to share with a broad-based constituency; practices such as this will enhance confidence and trust in the School's management of its resources. Equally as

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important as the date section of the Budget Calendar is the Budget Responsibility Index, or the 'who' for each component. The prior Section, Section D, addresses this important factor.

Prudent fiscal management suggests that monthly updates of all financial reports, including budgetary data, be considered. The theme incorporated in this document is that budget management is an essential fiduciary responsibility of the Governance Board, the School Principal, and the Chief Business Official (or agent), and is a daily, weekly, and monthly on-going review and update process.

The first section of the budget calendar presents each of the major phases in detail, including Individual Responsible for Function, Action Required, and Suggested Action Date.

**Bullis Charter School**  
**Draft Budget Calendar, 2003-2004 School Year**

<b>Item</b>	<b>Responsibility</b>	<b>Action Required</b>	<b>Action Week</b>
1.	Chief Business Officer (or agent designee)	Submit Budget Calendar to Administrative Team	Oct. 2nd
2.	Chief Facility Officer (or designee)	Submit Summary of Actual Fall Enrollment Report and 3 Year Projections to Administrative Team	Oct. 2nd
3.	School Principal	Delineate Budget Parameters	Oct. 2nd
4.	Administrative Team Fiscal Policy Team Other School Groups	Review Proposed Budget Calendar, Enrollment Projections, and Budget Parameters	Oct. 3rd Oct. 4th
5.	School Principal and Chief Business Officer	Consolidate Input and Recommendations of Constituent Groups	Oct. 4th
6.	Chief Business Officer	Present Budget Calendar to Governance Board	Nov. 1st
7.	Chief Facility Officer	Present Enrollment Projections to Governance Board	Nov. 1st
8.	School Principal	Present Budget Parameters to Governance Board	Nov. 1st
9.	Chief Personnel Officer (or designee)	Determine Staff Entitlements Based Upon Position Control and Enrollment Projections	Dec. 1st
10.	Chief Facility Officer	Present Proposed Construction Schedule to Administrative Team	Dec. 1st
11.	Chief Business Officer	Present First Interim Report to Administrative Team	Dec. 1st
12.	School Principal	Present First Interim Report to Governance Board	Dec. 1st
13.	Chief Business Officer	Present Governor's Budget to Administrative Team	Jan. 2nd
14.	Chief Business Officer	Present Governor's Budget to Governance Board	Jan. 2nd
15.	Chief Business Officer	Present Draft Budget to Administrative Team	Jan. 4th
16.	School Principal	Present Draft Budget to Governance Board	Feb. 1st

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<b>Item</b>	<b>Responsibility</b>	<b>Action Required</b>	<b>Action Week</b>
17.	Governance Board	Convene Strategic Budget Planning Workshop	Feb. 2nd
18.	Administrative Team Fiscal Policy Team Other School Groups	Review Proposed Draft Budget and Request Review of Recommendation from Strategic Budget Planning Workshop	Feb. 2nd to Mar. 2nd
19.	Chief Business Officer	Present Second Interim Report to Administrative Team	Feb. 4th
20.	School Principal	Present Second Interim Report to Governance Board	Mar. 1st
21.	School Principal	Present Recommendation for Reduction In Service for Particular Kinds of Service (if applicable) to Governance Board	Mar. 2nd
22.	School Principal and Chief Business Officer	Consolidate Input and Recommendations of Constituent Groups Re: Draft Budget Review	Mar. 3rd
23.	Chief Facility Officer	Present Updated Enrollment Projections to Administrative Team	Apr. 1st
24.	Chief Facility Officer	Present Updated Enrollment Projections to Board	Apr. 2nd
25.	Chief Business Officer	Present Department of Finance 'May Revise' to Administrative Team	May 2nd
26.	School Principal	Present Department of Finance 'May Revise' to Governance Board	May 2nd
27.	Chief Personnel Officer	Determine Revised Staff Entitlements Based Upon Position Control and Updated Enrollment Projections	May 2nd
28.	Chief Business Officer	Present Revised Draft Budget to Administrative Team	May 3rd
29.	School Principal	Present Revised Draft Budget to Governance Board	May 4th
30.	Governance Board	Distribute Revised Draft Budget to Fiscal Policy Team and Other Community Groups	June 1st
31.	Chief Business Officer	Present Draft Final Budget to Administrative Team	June 2nd
32.	School Principal	Present Draft Final Budget to Governance Board	June 2nd
33.	Governance Board	Hold Public Hearing on Proposed Budget	June 3rd
34.	Governance Board	Adopt Final Budget	June 3rd
35.	Chief Business Officer	Present Proposed Revisions to Adopted Budget Based Upon Final State Budget to Administrative Team (Necessary only if State Budget not adopted before School Budget Adopted in June)	Aug. TBA

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Item	Responsibility	Action Required	Action Week
36.	School Principal	Present Proposed Revisions to Adopted Budget Based Upon Final State Budget to Governance Board (Presented within 45 days of adoption of State Budget)	Aug. TBA or Sept. TBA
37.	Chief Business Officer	Present Unaudited Beginning Balance and Budget Carry Forward Appropriations to Administrative Team	Sept. 1st
38.	School Principal	Present Unaudited Beginning Balance and Budget Carry Forward Appropriations to Governance Board	Sept. 2nd
39.	Chief Business Officer	Present Audited Beginning Balance and Audit Adjustments to Administrative Team (Submit as soon as identified by independent external auditor)	TBA
40.	School Principal	Present Audited Beginning Balance and Audit Adjustments to Governance Board (No later than first Board meeting in January)	TBA
XX	Chief Business Officer	Present Monthly Budget Revision to Administrative Team	All, 1st
XX	School Principal	Present Monthly Budget Revisions to Governance Board	All, 2nd

Section

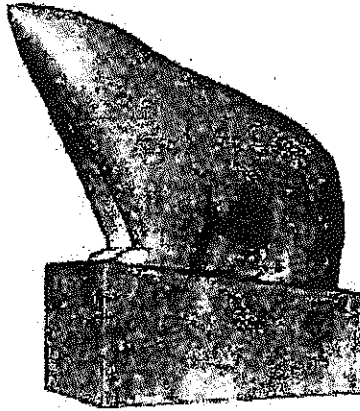
**E**

**School Calendar**

Bullis Charter School intends to adopt the Los Altos School District Calendar for 2003-2004

## Section II

### Summary Multi-Year Budget Projection



**Section II – Summary Multi-Year Budget** is the five-year projection for the school's entire operations. This document includes all estimated revenues and expenditures on a yearly basis along with the **projected surplus** or deficit each year. **Beginning and ending balance** projections are included along with the identification of reserve accounts.

### Summary Five Year Budget Projection

	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008
	Projected	Projected	Projected	Projected	Projected
State Revenue	\$1,267,260	\$1,698,588	\$1,769,374	\$1,821,946	\$1,869,506
Federal Revenue	\$969	\$986	\$1,015	\$1,045	\$1,074
Local Revenue	\$279,000	\$594,000	\$611,820	\$630,175	\$649,080
<b>Total Revenue</b>	<b>\$1,547,229</b>	<b>\$2,293,574</b>	<b>\$2,382,209</b>	<b>\$2,453,166</b>	<b>\$2,519,660</b>
Salaries	\$739,387	\$1,384,832	\$1,452,666	\$1,523,861	\$1,598,549
Employee Benefits	\$200,677	\$371,161	\$388,177	\$406,040	\$424,787
Books and Supplies	\$37,141	\$85,827	\$86,931	\$88,047	\$89,095
Operating Expenses	\$222,568	\$359,630	\$380,549	\$402,997	\$426,738
Capital Outlay	\$41,500	\$0	\$0	\$0	\$0
Debt Service					
<b>Total Expenses</b>	<b>\$1,241,273</b>	<b>\$2,201,450</b>	<b>\$2,308,323</b>	<b>\$2,420,944</b>	<b>\$2,539,169</b>
<b>Net Change</b>	<b>\$305,956</b>	<b>\$92,124</b>	<b>\$73,886</b>	<b>\$32,221</b>	<b>(\$19,509)</b>
<b>Beginning Balance</b>		<b>\$305,956</b>	<b>\$398,080</b>	<b>\$471,966</b>	<b>\$504,188</b>
<b>Ending Balance</b>	<b>\$305,956</b>	<b>\$398,080</b>	<b>\$471,966</b>	<b>\$504,188</b>	<b>\$484,679</b>

## Bullis Charter School

### Budget Worksheet

Ordinal Year Fiscal Year SACS Budget Type	Code	Year 0	Year I	Year II	Year III	Year IV	Year V
		2002-03 Governors Budget	2003-04 Governors Budget	2004-05 Governors Budget	2005-06 Governors Budget	2006-07 Governors Budget	2007-08 Governors Budget
<b>Revenues</b>							
<b>State Programs</b>							
Block Grant ADA Funding	8010-8099	\$ -	\$ 690,868	\$ 1,420,272	\$ 1,464,342	\$ 1,509,628	\$ 1,548,834
California Lottery - Restricted - Instructional Materials		-	-	1,976	3,952	3,952	3,952
California Lottery - Unrestricted Funds		-	-	16,568	33,136	31,920	32,832
Categorical Funding		-	30,540	62,898	64,869	66,997	68,821
Economic Impact Aid		-	-	-	-	-	-
Class Size Reduction, K-3		-	72,480	148,960	153,600	158,400	162,560
Summer and Hourly Programs							
Grades 2-9 who have been retained or who are		-	-	-	-	-	-
Grades 2-6 who are deficient in math, reading &		-	-	-	-	-	-
Grades K-12 core subject area supplement		-	-	-	-	-	-
Grades K-12 core; additional funding		-	-	-	-	-	-
Staff Development Buy Back, Certificated		-	6,279	12,894	13,314	13,734	14,112
Staff Development Buy Back, Classified		-	258	286	295	304	311
School Library Materials, K-12		-	-	-	-	-	-
Tobacco Use Prevention Programs							
Grades 4-6 Entitlement		-	444	907	935	964	989
Grades 6-8 Competitive Grant		-	-	-	-	-	-
Principal Leadership Training Principal or Asst. P		-	-	-	-	-	-
Charter School Facilities (per Student)		-	-	-	-	-	-
Instructional Materials		-	8,835	18,290	18,910	19,530	20,150
Library		-	2,519	5,180	5,341	5,506	5,648
Reading & Language Arts		-	5,038	10,357	10,680	11,011	11,296
Restricted Maintenance Account		-	-	-	-	-	-
Special Education		-	-	-	-	-	-
Neli Soto Parent-Teacher Involvement Program		-	-	-	-	-	-
Charter School Startup Grant		-	450,000	-	-	-	-
Charter School Implementation Grant		-	-	-	-	-	-
Other State Grants (Identify)	8300-8599	-	-	-	-	-	-
Other State Grants (Identify)	8300-8599	-	-	-	-	-	-
Other State Programs (Identify)	8300-8599	-	-	-	-	-	-
Other State Programs (Identify)	8300-8599	-	-	-	-	-	-
<b>Total State Programs</b>		<b>\$ -</b>	<b>\$ 1,267,260</b>	<b>\$ 1,698,588</b>	<b>\$ 1,769,374</b>	<b>\$ 1,821,946</b>	<b>\$ 1,869,506</b>

# Bullis Charter School

## Budget Worksheet

Ordinal Year Fiscal Year SACS Budget Type Code	Year 0 2002-03 Governors Budget	Year I 2003-04 Governors Budget	Year II 2004-05 Governors Budget	Year III 2005-06 Governors Budget	Year IV 2006-07 Governors Budget	Year V 2007-08 Governors Budget
<b>Federal Programs</b>						
Title I - Compensatory Education	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Title II - Staff Development	-	349	355	366	377	388
Title II - Piggyback Funds	-	-	-	-	-	-
Title IV - Safe & Drug Free Schools	-	620	631	649	668	687
Title VI - Innovative Programs	-	-	-	-	-	-
Title VI - Class Size Reduction	-	-	-	-	-	-
Other Federal Grants (Identify) 8100-8299	-	-	-	-	-	-
Other Federal Grants (Identify) 8100-8299	-	-	-	-	-	-
Other Federal Programs (Identify) 8100-8299	-	-	-	-	-	-
Other Federal Programs (Identify) 8100-8299	-	-	-	-	-	-
<b>Total Federal Programs</b>	<b>\$ -</b>	<b>\$ 969</b>	<b>\$ 986</b>	<b>\$ 1,015</b>	<b>\$ 1,045</b>	<b>\$ 1,074</b>
<b>Local Programs</b>						
Donations						
Bullis-Purissima Foundation	\$ -	\$ 279,000	\$ 558,000	\$ 574,740	\$ 591,982	\$ 609,742
Interest	-	-	36,000	37,080	38,192	39,338
Rents & Fees	-	-	-	-	-	-
Other Local Grants (Identify) 8600-8799	-	-	-	-	-	-
Other Local Grants (Identify) 8600-8799	-	-	-	-	-	-
Other Local Programs (Identify) 8600-8799	-	-	-	-	-	-
Other Local Programs (Identify) 8600-8799	-	-	-	-	-	-
<b>Total Local Programs</b>	<b>\$ -</b>	<b>\$ 279,000</b>	<b>\$ 594,000</b>	<b>\$ 611,820</b>	<b>\$ 630,175</b>	<b>\$ 649,080</b>
<b>TOTAL REVENUES</b>	<b>\$ -</b>	<b>\$ 1,547,229</b>	<b>\$ 2,293,574</b>	<b>\$ 2,382,209</b>	<b>\$ 2,453,166</b>	<b>\$ 2,519,660</b>



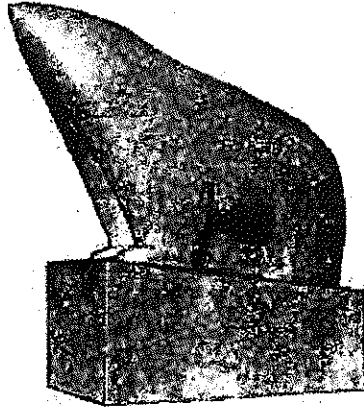
# Bullis Charter School

## Budget Worksheet

Ordinal Year Fiscal Year SACS Budget Type	Year 0 2002-03 Governors Budget	Year I 2003-04 Governors Budget	Year II 2004-05 Governors Budget	Year III 2005-06 Governors Budget	Year IV 2006-07 Governors Budget	Year V 2007-08 Governors Budget
<b>EXPENDITURES</b>						
Certificated Salaries	1000-1999	\$ -	\$ 618,867	\$ 1,209,153	\$ 1,268,910	\$ 1,331,634
Classified Salaries	2000-2999	-	120,520	175,680	183,756	192,227
Employee Benefits	3000-3999	-	200,677	371,161	388,177	406,040
Books & Supplies	4000-4999	-	37,141	85,827	86,931	88,047
Services & Operational Expenses	5000-5999	-	222,568	359,630	380,549	402,937
Capital Outlay	6000-6999	-	41,500	-	-	-
Other Outgo	7100-7299	-	-	-	-	-
Direct Support/Indirect Costs	7300-7399	-	-	-	-	-
Other Expenditures (Identify)		-	-	-	-	-
Other Expenditures (Identify)		-	-	-	-	-
<b>TOTAL EXPENDITURES</b>		<b>\$ -</b>	<b>\$ 1,241,273</b>	<b>\$ 2,201,450</b>	<b>\$ 2,308,323</b>	<b>\$ 2,420,944</b>
<b>BUDGET SURPLUS/(DEFICIT)</b>		<b>\$ -</b>	<b>\$ 305,956</b>	<b>\$ 92,124</b>	<b>\$ 73,886</b>	<b>\$ 32,221</b>
<b>OTHER FINANCING SOURCES/USES</b>						
Interfund Transfers						
Transfers In	8910-8929	-	-	-	-	-
Transfers Out	7610-7629	-	-	-	-	-
Sources	8930-8979	-	-	-	-	-
Uses	7630-7699	-	-	-	-	-
Contributions	8980-8999	-	-	-	-	-
<b>TOTAL OTHER FINANCING SOURCES/USES</b>		<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>NET INCREASE/(DECREASE) IN FUND BALANCE</b>		<b>\$ -</b>	<b>\$ 305,956</b>	<b>\$ 92,124</b>	<b>\$ 73,886</b>	<b>\$ 32,221</b>
<b>FUND BALANCE, RESERVES</b>						
Beginning Fund Balance						
As of July 1, Unaudited	9791	-	-	305,956	398,080	471,966
Plus/(Minus) Audit Adjustments	9793	-	-	-	-	-
As of July 1, Audited		-	-	305,956	398,080	471,966
Other Restatements	9795	-	-	-	-	-
Net Beginning Balance		-	-	305,956	398,080	471,966
<b>Ending Fund Balance, June 30</b>		<b>\$ -</b>	<b>\$ 305,956</b>	<b>\$ 398,080</b>	<b>\$ 471,966</b>	<b>\$ 504,188</b>
<b>COMPONENTS FOR ENDING FUND BALANCE</b>						
Miscellaneous Components						
Reserve for Revolving Cash	9711	-	-	-	-	-
Stores - Warehouse	9712	-	-	-	-	-
Prepaid Expenditures	9713	-	-	-	-	-
All Others	9719	-	-	-	-	-
General Reserve	9730	-	-	-	-	-
Legally Restricted Balances	9740	-	-	-	-	-
Designated Amounts						
Designated for Economic Uncertainty	9770	-	50,000	66,044	69,250	72,628
Other Designations	9780	-	-	-	-	-
Undesignated Amount	9790	-	-	-	-	-
Unappropriated Amount	9790	-	255,956	332,037	402,716	431,559
<b>TOTAL COMPONENTS FOR ENDING FUND BALANCE</b>		<b>\$ -</b>	<b>\$ 305,956</b>	<b>\$ 398,080</b>	<b>\$ 471,966</b>	<b>\$ 504,188</b>
Do Ending Balance Computations Match?		Yes	Yes	Yes	Yes	Yes

## Section III

### Multi-Year Demographic Variables



**Section III – Multi-Year Demographic Variables**<sup>2</sup> is the first section in which the key variables of budget development are outlined. This section, while a bit lengthy, **identifies** the **foundation** on which the budget is built. The **major student attributes**, ranging from **enrollment by grade level** to other important demographic characteristics of students, such as English language fluency, family socio-economic background, special education designation, etc. are projected as the various individual student profiles are the factors on which many state and federal program fundings and entitlements are based. **Student attendance** is compiled, presented and analyzed in several ways as it is the determinant for over 50% of the school's funding. A corresponding student attendance monitoring system compliments the regular monthly budget monitoring of student attendance.

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<sup>2</sup> Note that the acronym 'KV' on the bottom of sheets in Sections III and IV refers to 'Key Variables'

## Bullis Charter School

### Key Variables Worksheet — Student Enrollment Data

Year Fiscal Year	Year I 2003-04	Year II 2004-05	Year III 2005-06	Year IV 2006-07	Year V 2007-08
	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS
<b>Student Enrollment</b>					
<b>Resident Pupils</b>					
Kindergarten	20	40	40	40	40
1st Grade	20	40	40	40	40
2nd Grade	20	40	40	40	40
3rd Grade	20	40	40	40	40
4th Grade	25	50	50	50	50
5th Grade	25	50	50	50	50
6th Grade	25	50	50	50	50
<b>Total</b>	155	310	310	310	310
<b>Resident Pupil Summary</b>					
Grades K-3	80	160	160	160	160
Grades 4-6	75	150	150	150	150
<b>Total</b>	155	310	310	310	310
<b>Non-Resident Pupils</b>					
Kindergarten	-	-	-	-	-
1st Grade	-	-	-	-	-
2nd Grade	-	-	-	-	-
3rd Grade	-	-	-	-	-
4th Grade	-	-	-	-	-
5th Grade	-	-	-	-	-
6th Grade	-	-	-	-	-
<b>Total</b>	-	-	-	-	-
<b>Non-Resident Pupil Summary</b>					
Grades K-3	-	-	-	-	-
Grades 4-6	-	-	-	-	-
<b>Total</b>	-	-	-	-	-
<b>Summary of All Enrollment</b>					
Grades K-3	80	160	160	160	160
Grades 4-6	75	150	150	150	150
<b>Total</b>	155	310	310	310	310

# Bullis Charter School

## Key Variables Worksheet — Student ADA Data

Year Fiscal Year	Year I 2003-04			Year II 2004-05			Year III 2005-06			Year IV 2006-07			Year V 2007-08		
	P-1 Estimate	P-2 Estimate	Annual Estimate	P-1 Estimate	P-2 Estimate	Annual Estimate	P-1 Estimate	P-2 Estimate	Annual Estimate	P-1 Estimate	P-2 Estimate	Annual Estimate	P-1 Estimate	P-2 Estimate	Annual Estimate
<b>CBEDS:ADA Correlation Ratios (based on School/County/District norm)</b>															
<b>Resident Pupil Groups, ADA Ratios</b>															
Grades K-3	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98
Grades 4-6	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98
Grades 7-8	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98
Grades 9-12	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98	0.98
<b>Resident Pupil ADA Data (calculated from CBEDS:ADA Correlation Ratio)</b>															
Grades K-3	78	78	78	157	157	157	157	157	157	157	157	157	157	157	157
Grades 4-6	74	74	74	147	147	147	147	147	147	147	147	147	147	147	147
<b>Total</b>	<b>152</b>	<b>152</b>	<b>152</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>
<b>Non-Resident Pupil Groups, ADA Ratios</b>															
Grades K-3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Grades 4-6	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Non-Resident Pupil ADA Data (calculated from CBEDS:ADA Correlation Ratio)</b>															
Grades K-3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Grades 4-6	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total ADA Data (calculated from CBEDS:ADA Correlation Ratio)</b>															
Grades K-3	78	78	78	157	157	157	157	157	157	157	157	157	157	157	157
Grades 4-6	74	74	74	147	147	147	147	147	147	147	147	147	147	147	147
<b>Total ADA</b>	<b>152</b>	<b>152</b>	<b>152</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>	<b>304</b>

## Bullis Charter School

### Key Variables Worksheet — Student Demographics Data

Variables	Year Fiscal Year	Year I 2003-04	Year II 2004-05	Year III 2005-06	Year IV 2006-07	Year V 2007-08
	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS
<b>Student Ethnicity Counts</b>						
<b>Resident Pupil</b>	<i>(figures in italics are estimated amounts based on prior year data)</i>					
American Indian	-	-	-	-	-	-
Asian	26	<i>53</i>	<i>53</i>	<i>53</i>	<i>53</i>	53
Pacific Islander	2	<i>4</i>	<i>4</i>	<i>4</i>	<i>4</i>	4
Filipino	-	<i>1</i>	<i>1</i>	<i>1</i>	<i>1</i>	1
Hispanic	2	<i>3</i>	<i>3</i>	<i>3</i>	<i>3</i>	3
African American	2	<i>3</i>	<i>3</i>	<i>3</i>	<i>3</i>	3
White	122	<i>245</i>	<i>245</i>	<i>245</i>	<i>245</i>	245
Multiple/No Response	-	<i>1</i>	<i>1</i>	<i>1</i>	<i>1</i>	1
<b>Subtotal</b>	154	310	310	310	310	310
<b>Non-Resident Pupil</b>						
	<i>(figures in italics are estimated amounts based on prior year data)</i>					
American Indian	-	-	-	-	-	-
Asian	-	-	-	-	-	-
Pacific Islander	-	-	-	-	-	-
Filipino	-	-	-	-	-	-
Hispanic	-	-	-	-	-	-
African American	-	-	-	-	-	-
White	-	-	-	-	-	-
Multiple/No Response	-	-	-	-	-	-
<b>Subtotal</b>	-	-	-	-	-	-
<b>Total All Pupils</b>						
	<i>(figures in italics are estimated amounts based on prior year data)</i>					
American Indian	-	-	-	-	-	-
Asian	26	<i>53</i>	<i>53</i>	<i>53</i>	<i>53</i>	53
Pacific Islander	2	<i>4</i>	<i>4</i>	<i>4</i>	<i>4</i>	4
Filipino	-	<i>1</i>	<i>1</i>	<i>1</i>	<i>1</i>	1
Hispanic	2	<i>3</i>	<i>3</i>	<i>3</i>	<i>3</i>	3
African American	2	<i>3</i>	<i>3</i>	<i>3</i>	<i>3</i>	3
White	122	<i>245</i>	<i>245</i>	<i>245</i>	<i>245</i>	245
Multiple/No Response	-	<i>1</i>	<i>1</i>	<i>1</i>	<i>1</i>	1
<b>Total</b>	154	310	310	310	310	310

# Bullis Charter School

## Key Variables Worksheet — Student Demographics Data

Variables	Year Fiscal Year 2003-04 Oct CBEDS	Year I 2004-05 Oct CBEDS	Year II 2005-06 Oct CBEDS	Year III 2006-07 Oct CBEDS	Year IV 2007-08 Oct CBEDS
<b>Student Ethnicity Percentages</b>					
<b>Resident Pupil</b>	(figures in italics are estimated amounts based on prior year data)				
American Indian	0.0%	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>
Asian	16.8%	<i>17.1%</i>	<i>17.1%</i>	<i>17.1%</i>	<i>17.1%</i>
Pacific Islander	1.3%	<i>1.3%</i>	<i>1.3%</i>	<i>1.3%</i>	<i>1.3%</i>
Filipino	0.0%	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>
Hispanic	1.3%	<i>1.0%</i>	<i>1.0%</i>	<i>1.0%</i>	<i>1.0%</i>
African American	1.3%	<i>1.0%</i>	<i>1.0%</i>	<i>1.0%</i>	<i>1.0%</i>
White	78.7%	<i>79.0%</i>	<i>79.0%</i>	<i>79.0%</i>	<i>79.0%</i>
Multiple/No Response	0.0%	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>
<b>Subtotal</b>	99%	100%	100%	100%	100%
<b>Non-Resident Pupil</b>					
	(figures in italics are estimated amounts based on prior year data)				
American Indian	N/A	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
Asian	N/A	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
Pacific Islander	N/A	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
Filipino	N/A	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
Hispanic	N/A	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
African American	N/A	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
White	N/A	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
Multiple/No Response	N/A	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
<b>Subtotal</b>	0%	0%	0%	0%	0%
<b>Total All Pupils</b>					
	(figures in italics are estimated amounts based on prior year data)				
American Indian	0.0%	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>
Asian	16.8%	<i>17.1%</i>	<i>17.1%</i>	<i>17.1%</i>	<i>17.1%</i>
Pacific Islander	1.3%	<i>1.3%</i>	<i>1.3%</i>	<i>1.3%</i>	<i>1.3%</i>
Filipino	0.0%	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>
Hispanic	1.3%	<i>1.0%</i>	<i>1.0%</i>	<i>1.0%</i>	<i>1.0%</i>
African American	1.3%	<i>1.0%</i>	<i>1.0%</i>	<i>1.0%</i>	<i>1.0%</i>
White	78.7%	<i>79.0%</i>	<i>79.0%</i>	<i>79.0%</i>	<i>79.0%</i>
Multiple/No Response	0.0%	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>
<b>Total</b>	99%	100%	100%	100%	100%

## Bullis Charter School

### Key Variables Worksheet — Student Demographics Data

Variables	Year Fiscal Year	Year I 2003-04	Year II 2004-05	Year III 2005-06	Year IV 2006-07	Year V 2007-08
	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS
<b>(estimated number of students eligible for free/reduced meals)</b>						
<b>Student Lunch Count</b>						
Kindergarten	-	-	-	-	-	-
1st Grade	-	-	-	-	-	-
2nd Grade	-	-	-	-	-	-
3rd Grade	-	-	-	-	-	-
4th Grade	1	1	1	1	1	1
5th Grade	1	1	1	1	1	1
6th Grade	-	1	1	1	1	1
<b>Total</b>	<b>2</b>	<b>3</b>	<b>3</b>	<b>3</b>	<b>3</b>	<b>3</b>
<b>(estimated percentages of students eligible for free/reduced meals)</b>						
<b>Student Lunch Count Percentage</b>						
Kindergarten	1%	1%	1%	1%	1%	1%
1st Grade	1%	1%	1%	1%	1%	1%
2nd Grade	1%	1%	1%	1%	1%	1%
3rd Grade	1%	1%	1%	1%	1%	1%
4th Grade	1%	1%	1%	1%	1%	1%
5th Grade	1%	1%	1%	1%	1%	1%
6th Grade	1%	1%	1%	1%	1%	1%
<b>Total</b>	<b>1.3%</b>	<b>1.0%</b>	<b>1.0%</b>	<b>1.0%</b>	<b>1.0%</b>	<b>1.0%</b>

# Bullis Charter School

## Key Variables Worksheet — Student Demographics Data

Variables	Year Fiscal Year	Year I 2003-04	Year II 2004-05	Year III 2005-06	Year IV 2006-07	Year V 2007-08
	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS	Oct CBEDS
<b>Special Population Data</b>						
	(estimated number of students in these programs)					
<b>Resident Pupil</b>	(figures in italics are estimated amounts based on prior year data)					
English Language Learner	8	16	16	16	16	16
Free/Reduced Meal Eligible	2	3	3	3	3	3
CalWORKS/AFDC	-	-	-	-	-	-
<b>Non-Resident Pupil</b>						
English Language Learner	-	-	-	-	-	-
Free/Reduced Meal Eligible	-	-	-	-	-	-
CalWORKS/AFDC	-	-	-	-	-	-
<b>Total All Pupils</b>						
English Language Learner	8	16	16	16	16	16
Free/Reduced Meal Eligible	2	3	3	3	3	3
CalWORKS/AFDC	-	-	-	-	-	-
<b>Special Population Data</b>						
	(estimated percentages of students in these programs)					
<b>Resident Pupil</b>	(figures in italics are estimated amounts based on prior year data)					
English Language Learner	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%
Free/Reduced Meal Eligible	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
CalWORKS/AFDC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Non-Resident Pupil</b>						
English Language Learner	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Free/Reduced Meal Eligible	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CalWORKS/AFDC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total All Pupils</b>						
English Language Learner	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%
Free/Reduced Meal Eligible	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
CalWORKS/AFDC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

*Note: English Language Learner Count is taken as of R-30 Spring Report, not October CBEDS*



# Bullis Charter School

## Key Variables Worksheet — Special Education Student Data

Variables	Year Fiscal Year	Year I 2003-04		Year II 2004-05		Year III 2005-06		Year IV 2006-07		Year V 2007-08	
		Dec	May	Dec	May	Dec	May	Dec	May	Dec	May
	<b>Resident Pupil</b>										
Resource Specialist		0	0	0	0	0	0	0	0	0	0
Special Day - Non Severe		0	0	0	0	0	0	0	0	0	0
Special Day - Severe		0	0	0	0	0	0	0	0	0	0
<b>SubTotal</b>		0	0	0	0	0	0	0	0	0	0
<b>Non-Resident Pupil</b>											
Resource Specialist		0	0	0	0	0	0	0	0	0	0
Special Day - Non Severe		0	0	0	0	0	0	0	0	0	0
Special Day - Severe		0	0	0	0	0	0	0	0	0	0
<b>SubTotal</b>		0	0	0	0	0	0	0	0	0	0
<b>All Special Education Pupils</b>											
Resource Specialist		0	0	0	0	0	0	0	0	0	0
Special Day - Non Severe		0	0	0	0	0	0	0	0	0	0
Special Day - Severe		0	0	0	0	0	0	0	0	0	0
<b>Total</b>		0	0	0	0	0	0	0	0	0	0

*Note: Estimated 10% student identification*

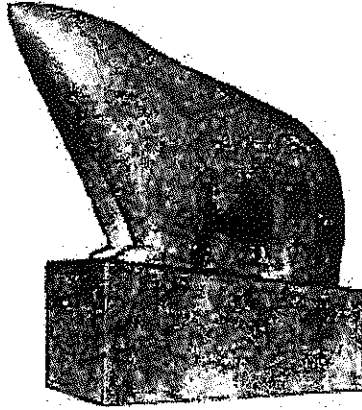
# Bullis Charter School

## Key Variables Worksheet — School Operations Data

Variables	Year Fiscal Year	Year I 2003-04 Annual	Year II 2004-05 Annual	Year III 2005-06 Annual	Year IV 2006-07 Annual	Year V 2007-08 Annual
<b>School Calendar Details</b>						
Regular Program Days		185	185	185	185	185
Additional Staff Development Days		3	3	3	3	3
Length of School Day, grades K-5		6.25	6.25	6.25	6.25	6.25
Length of School Day, grades 6-8		8	8	8	8	8
Length of School Day, teachers & staff		8	8	8	8	8
Saturday School Days		0	37	37	37	37
Intersession Days		0	10	16	16	16
Summer School Days		16	19	19	19	19
<b>Supplemental Instruction, Estimated Total Hours (including Cap)</b>						
Grades 2-9 who have been retained or s		0	0	0	0	0
Grades 2-6 who are academically deficie		0	0	0	0	0
Grades K-12 core subject area supplem		0	0	0	0	0
Grades K-12 core; possible additional ho		0	0	0	0	0
<b>Supplemental Instruction Days</b>						
Grades 2-9 who have been retained or s		0	0	0	0	0
Grades 2-6 who are academically deficie		0	0	0	0	0
Grades K-12 core subject area supplem		0	0	0	0	0
<b>Supplemental Instruction, Hours/Day</b>						
Grades 2-9 who have been retained or s		0	0	0	0	0
Grades 2-6 who are academically deficie		0	0	0	0	0
Grades K-12 core subject area supplem		0	0	0	0	0

## Section IV

### Multi-Year Revenue and Expenditure Variables



**Section IV – Multi-Year Revenue and Expenditure Variables** is the section that defines the **parameters** on which the **funding is estimated** as well as the **foundation** on which **expenditures** are **projected**. For the revenue components, the estimated funding per program is identified for each of the five years. This section is also used as a 'check-list' to be certain that the school applies for all fundings to which the students are entitled.

For the **expenditure section**, major emphasis is placed on **compensation costs** as schools are labor intense organizations. Specific **staffing ratios** are identified along with other position control features. Substitute time cost estimates are indicated along with the assumed basis for the estimate.

# Bullis Charter School

## Key Variables Worksheet — State Funding Data

Ordinal Year Fiscal Year	Year 0		Year I		Year II		Year III		Year IV		Year V		Comments
	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	
<b>State Revenue Variables</b>													
<b>Financial Projection Factors</b>													
Statutory COLA	2.00%		0.00%	2.80%	3.10%	3.10%	3.10%	3.10%	3.10%	3.10%	2.60%		
Special Education Base Deficit	0.00%	02/25/03	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		
Categorical COLA	1.66%		1.90%	2.80%	3.10%	3.10%	3.10%	3.10%	3.10%	3.10%	2.60%		for comparison to Statutory COLA
Transportation COLA	3.05%		3.00%	3.80%	4.00%	4.00%	4.00%	4.00%	3.90%	3.90%	2.60%		for comparison to Statutory COLA
California CPI	2.30%		2.60%	2.90%	3.10%	3.10%	3.10%	3.10%	3.10%	3.10%	2.60%		for comparison to Statutory COLA
10-yr Treasury Interest Rate	5.60%		6.00%	5.90%	6.00%	6.00%	6.00%	6.00%	6.00%	6.00%	6.00%		for comparison to Statutory COLA
<b>Charter School General Purpose Block Grant Allocations</b>													
Grades K-3	\$ 4,515	\$	\$ 4,515	\$ 4,641	\$ 4,765	\$ 4,765	\$ 4,765	\$ 4,765	\$ 4,983	\$ 4,983	\$ 5,061		Annual revenue per pupil
Grades 4-6	\$ 4,577	\$	\$ 4,577	\$ 4,705	\$ 4,851	\$ 4,851	\$ 4,851	\$ 4,851	\$ 5,001	\$ 5,001	\$ 5,131		Annual revenue per pupil
<b>Charter School Categorical Program Allocations</b>													
Grades K-3	\$ 198	\$	\$ 198	\$ 204	\$ 210	\$ 210	\$ 210	\$ 210	\$ 217	\$ 217	\$ 223		Annual revenue per pupil
Grades 4-6	\$ 204	\$	\$ 204	\$ 210	\$ 217	\$ 217	\$ 217	\$ 217	\$ 224	\$ 224	\$ 230		Annual revenue per pupil
<b>Primary Class Size Reduction</b>													
Full Day Program	\$ 906	\$	\$ 906	\$ 931	\$ 960	\$ 960	\$ 960	\$ 960	\$ 990	\$ 990	\$ 1,016		Annual revenue per pupil, grades K-3
Half Day Program	\$ 427	\$	\$ 427	\$ 439	\$ 453	\$ 453	\$ 453	\$ 453	\$ 467	\$ 467	\$ 479		Annual revenue per pupil, grades K-3
<b>Summer and Hourly Programs</b>													
Grades 7-12 at risk of failing High School	\$ 3.45	\$	\$ 3.45	\$ 3.55	\$ 3.66	\$ 3.66	\$ 3.66	\$ 3.66	\$ 3.77	\$ 3.77	\$ 3.87		Hourly revenue per pupil
Grades 2-9 who have been retained or w/	\$ 3.45	\$	\$ 3.45	\$ 3.55	\$ 3.66	\$ 3.66	\$ 3.66	\$ 3.66	\$ 3.77	\$ 3.77	\$ 3.87		Hourly revenue per pupil
Grades 7-8 Algebra	\$ 3.45	\$	\$ 3.45	\$ 3.55	\$ 3.66	\$ 3.66	\$ 3.66	\$ 3.66	\$ 3.77	\$ 3.77	\$ 3.87		Hourly revenue per pupil

# Bullis Charter School

## Key Variables Worksheet — State Funding Data

Ordinal Year Fiscal Year	Year 0 2002-03		Year I 2003-04		Year II 2004-05		Year III 2005-06		Year IV 2006-07		Year V 2007-08		Comments
	Governors Budget		Governors Budget		Governors Budget		Governors Budget		Governors Budget		Governors Budget		
Staff Development Buy Back													
Certificated	\$ 299	\$	\$ 299	\$	\$ 307	\$	\$ 317	\$	\$ 327	\$	\$ 336		Daily revenue per participating FTE
Classified	\$ 155	\$	\$ 155	\$	\$ 159	\$	\$ 164	\$	\$ 169	\$	\$ 173		Daily revenue per participating FTE
School Library Materials, K-12	\$ 5.33	\$	\$ 5.33	\$	\$ 5.48	\$	\$ 5.65	\$	\$ 5.83	\$	\$ 5.98		Annual revenue per pupil; revenue is restricted
Digital High School	\$ 45	\$	\$ 45	\$	\$ 46	\$	\$ 47	\$	\$ 48	\$	\$ 49		Annual revenue per pupil
Tobacco Use Prevention in Education (TUPE)													
Grades 4-6(8?) Entitlement	\$ 6.00	\$	\$ 6.00	\$	\$ 6.17	\$	\$ 6.36	\$	\$ 6.56	\$	\$ 6.73		Annual revenue per pupil
Grades 6-8, Competitive Grant	\$ -	\$	\$ -	\$	\$ -	\$	\$ -	\$	\$ -	\$	\$ -		Maximum School Revenue
AB75 Principal Leadership Training Pro	\$ -	\$	\$ -	\$	\$ -	\$	\$ -	\$	\$ -	\$	\$ -		Annual revenue per Principal or Asst. Principal
Charter School Facilities (per Student)	\$ 750	\$	\$ 750	\$	\$ 771	\$	\$ 795	\$	\$ 820	\$	\$ 841		Annual revenue per pupil (P2-ADA); must have
California Lottery													
Restricted - Instructional Materials	\$ 11.50	\$	\$ 12.00	\$	\$ 13.00	\$	\$ 13.00	\$	\$ 13.00	\$	\$ 13.00		Annual revenue per pupil (prior year ADA)
Unrestricted Funds	\$ 114.50	\$	\$ 114.00	\$	\$ 109.00	\$	\$ 109.00	\$	\$ 105.00	\$	\$ 108.00		Annual revenue per pupil (prior year ADA)
Other State Programs													
Instructional Materials	\$ 57.00	\$	\$ 57.00	\$	\$ 59.00	\$	\$ 61.00	\$	\$ 63.00	\$	\$ 65.00		
Library	\$ 16.25	\$	\$ 16.25	\$	\$ 16.71	\$	\$ 17.23	\$	\$ 17.76	\$	\$ 18.22		Annual revenue per pupil; revenue is restricted
Reading & Language Arts	\$ 32.50	\$	\$ 32.50	\$	\$ 33.41	\$	\$ 34.45	\$	\$ 35.52	\$	\$ 36.44		Annual revenue per pupil; revenue is restricted
Restricted Maintenance Account	\$ -	\$	\$ -	\$	\$ -	\$	\$ -	\$	\$ -	\$	\$ -		
(Identify)	\$ -	\$	\$ -	\$	\$ -	\$	\$ -	\$	\$ -	\$	\$ -		
(Identify)	\$ -	\$	\$ -	\$	\$ -	\$	\$ -	\$	\$ -	\$	\$ -		

# Bullis Charter School

## Key Variables Worksheet — Federal Funding Data

Ordinal Year Fiscal Year	Year I 2003-04		Year II 2004-05		Year III 2005-06		Year IV 2006-07		Year V 2007-08		Comments	
	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget		
<b>Federal Revenue Variables</b>												
<b>Title II - Eisenhower Professional Development</b>												
Staff Development Funds	n/a	\$ 2.25	\$ 2.29	\$ 2.36	\$ 2.43	\$ 2.50						Annual revenue per pupil
Title IV - Safe & Drug Free Schools	n/a	\$ 4.00	\$ 4.07	\$ 4.19	\$ 4.31	\$ 4.43						Annual revenue per pupil
<b>Title VI</b>												
Innovative Programs (Minimum Grant)	n/a	\$ -	\$ -	\$ -	\$ -	\$ -						Annual revenue per pupil
	n/a	\$ -	\$ -	\$ -	\$ -	\$ -						For schools with 10 or fewer qualifying pupil
<b>Title VI</b>												
Class Size Reduction	n/a	\$ -	\$ -	\$ -	\$ -	\$ -						Annual revenue per pupil
<b>Other Federal Programs</b>												
(Identify)												
(Identify)												
(Identify)												

# Bullis Charter School

## Key Variables Worksheet — Local Funding Data

Ordinal Year Fiscal Year	Year 0 2002-03		Year I 2003-04		Year II 2004-05		Year III 2005-06		Year IV 2006-07		Year V 2007-08		Comments
	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	
<b>Local Revenue Variables</b>													
Cost of Living Allowance <i>current as of</i>	0.00%	03/10/03	0.00%	03/10/03	0.00%	03/10/03	3.00%	03/10/03	3.00%	03/10/03	3.00%	03/10/03	
<b>Donations</b>													
Bullis-Purissima Foundation (Identify)	\$ -		\$ 1,800		\$ 1,800		\$ 1,854		\$ 1,910		\$ 1,967		estimated donation per pupil
		n/a											
<b>Interest</b>													
Yield Rate (APR)	n/a		6%		6%		6%		6%		6%		
Average Balance	\$ -		\$ 600,000		\$ 600,000		\$ 618,000		\$ 636,540		\$ 655,636		Charter Endowment Fund
Annual Interest Income	\$ -		\$ -		\$ 36,000		\$ 37,080		\$ 38,192		\$ 39,338		
<b>Other Local Programs</b>													
(Identify)													
(Identify)													
(Identify)													

# Bullis Charter School

## Key Variables Worksheet — School Staffing Data

Ordinal Year Fiscal Year	Year 0 2002-03	Year I 2003-04	Year II 2004-05	Year III 2005-06	Year IV 2006-07	Year V 2007-08
Budget Type	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget
<b>Certificated Staff</b>						
<b>Staffing Ratios</b>						
<b>Teachers - Regular Programs</b>						
Kindergarten	0	1/20	1/20	1/20	1/20	1/20
1st Grade	0	1/20	1/20	1/20	1/20	1/20
2nd Grade	0	1/20	1/20	1/20	1/20	1/20
3rd Grade	0	1/20	1/20	1/20	1/20	1/20
4th Grade	0	1/25	1/25	1/25	1/25	1/25
5th Grade	0	1/25	1/25	1/25	1/25	1/25
6th Grade	0	1/25	1/25	1/25	1/25	1/25
<b>Teachers - Independent Study Programs</b>						
Kindergarten	-	-	-	-	-	-
Grades 1 - 3	-	-	-	-	-	-
Grades 4 - 6	-	-	-	-	-	-



## Bullis Charter School

### Key Variables Worksheet — School Staffing Data

Ordinal Year Fiscal Year	Year 0 2002-03	Year I 2003-04	Year II 2004-05	Year III 2005-06	Year IV 2006-07	Year V 2007-08
Budget Type	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget
<b>Staffing Projection</b>						
<b>Teachers - Regular Programs (FTE)</b>						
Kindergarten	-	1.00	2.00	2.00	2.00	2.00
1st Grade	-	1.00	2.00	2.00	2.00	2.00
2nd Grade	-	1.00	2.00	2.00	2.00	2.00
3rd Grade	-	1.00	2.00	2.00	2.00	2.00
4th Grade	-	1.00	2.00	2.00	2.00	2.00
5th Grade	-	1.00	2.00	2.00	2.00	2.00
6th Grade	-	1.00	2.00	2.00	2.00	2.00
7th Grade	-	-	-	-	-	-
8th Grade	-	-	-	-	-	-
9th Grade	-	-	-	-	-	-
10th Grade	-	-	-	-	-	-
11th Grade	-	-	-	-	-	-
12th Grade	-	-	-	-	-	-
<b>Subtotal</b>	-	7.00	14.00	14.00	14.00	14.00
<b>Teachers - Independent Study Programs (FTE)</b>						
Kindergarten	-	-	-	-	-	-
Grades 1 - 3	-	-	-	-	-	-
Grades 4 - 6	-	-	-	-	-	-
Grades 7 - 8	-	-	-	-	-	-
Grades 9 - 12	-	-	-	-	-	-
<b>Subtotal</b>	-	-	-	-	-	-
<b>All Teachers Combined</b>						
Kindergarten	-	1.00	2.00	2.00	2.00	2.00
Grades 1 - 3	-	3.00	6.00	6.00	6.00	6.00
Grades 4 - 6	-	3.00	6.00	6.00	6.00	6.00
Grades 7 - 8	-	-	-	-	-	-
Grades 9 - 12	-	-	-	-	-	-
<b>Total Teacher FTE</b>	-	7.00	14.00	14.00	14.00	14.00

## Bullis Charter School

### Key Variables Worksheet — School Staffing Data

Ordinal Year	Year 0	Year I	Year II	Year III	Year IV	Year V
Fiscal Year	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Budget Type	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget
<b>Site Administration &amp; Other Certificated (FTE)</b>						
Counselor	-	-	-	-	-	-
Librarian	-	-	0.40	0.40	0.40	0.40
Nurse	-	-	-	-	-	-
Principal	-	1.00	1.00	1.00	1.00	1.00
Teacher - Art	-	0.20	0.40	0.40	0.40	0.40
Teacher - Math Enrichment	-	0.20	0.40	0.40	0.40	0.40
Teacher - Music Enrichment	-	0.20	0.40	0.40	0.40	0.40
Teacher - P.E.	-	0.20	0.40	0.40	0.40	0.40
Teacher - Science Enrichment	-	0.20	0.40	0.40	0.40	0.40
Other (Identify)	-	-	-	-	-	-
Other (Identify)	-	-	-	-	-	-
<b>Total Site Administration Staff FTE</b>	-	2.00	3.40	3.40	3.40	3.40
<b>Total Certificated Staff FTE</b>	-	9.00	17.40	17.40	17.40	17.40
<b>Classified Staff</b>						
<b>Site Staff (FTE)</b>						
Computer Specialist	-	0.40	0.80	0.80	0.80	0.80
Custodian	-	-	1.00	1.00	1.00	1.00
Maintenance/Custodian	-	1.00	-	-	-	-
Maintenance	-	-	0.50	0.50	0.50	0.50
Secretary	-	1.00	1.00	1.00	1.00	1.00
Other (Identify)	-	-	-	-	-	-
Other (Identify)	-	-	-	-	-	-
<b>Total Site Staff FTE</b>	-	2.40	3.30	3.30	3.30	3.30
<b>Hourly Staff (hrs/day)</b>						
<b>Classified</b>						
Instructional Aides	-	6.00	9.00	9.00	9.00	9.00
Library Aide	-	-	-	-	-	-
School Health Aide	-	-	-	-	-	-
Other (Identify)	-	-	-	-	-	-
<b>Total FTE for Hourly Support Staff</b>	-	0.75	1.13	1.13	1.13	1.13
<b>Total Classified Staff FTE</b>	-	3.15	4.43	4.43	4.43	4.43
<b>Total All Staff (FTE Count)</b>	-	12.15	21.83	21.83	21.83	21.83

# Bullis Charter School

## Key Variables Worksheet — Staff Compensation Data

Ordinal Year	Year 0	Year I	Year II	Year III	Year IV	Year V	
Fiscal Year	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	
SACS	Governors	Governors	Governors	Governors	Governors	Governors	
Budget Type	Budget	Budget	Budget	Budget	Budget	Budget	
<b>Data Related to Teacher Compensation</b>							
<b>Activites with Day Counts</b>							
Sick Leave	n/a	0	5	5	5	5	
Extra Duty	n/a	0	0	0	0	0	
Regular Staff Devel.	n/a	0	0	0	0	0	
Special Staff Devel.	n/a	0	0	0	0	0	
State Buy-Back Certif.	n/a	0	3	3	3	3	
State Buy-Back Class.	n/a	0	1	1	1	1	
<b>Activites with Hour Counts</b>							
Kindergarten	n/a	0	0	0	0	0	
1st Grade	n/a	0	0	0	0	0	
2nd Grade	n/a	0	0	0	0	0	
3rd Grade	n/a	0	0	0	0	0	
4th Grade	n/a	0	0	0	0	0	
5th Grade	n/a	0	0	0	0	0	
6th Grade	n/a	0	0	0	0	0	
<b>Certificated Salary Costs</b>							
1000-1999							
<b>Certificated Teacher Salary Costs</b>							
Annual Teacher Salary COLA		0.0%	5.0%	5.0%	5.0%	5.0%	
Average Teacher Cost - Regular	1100	\$ -	\$ 61,200	\$ 64,260	\$ 67,473	\$ 70,847	\$ 74,389
Substitute Teacher Cost per Day		\$ -	\$ 220	\$ 225	\$ 230	\$ 235	\$ 240
Daily Teacher Extra Duty Rate	1100	\$ -	\$ 331	\$ 347	\$ 365	\$ 383	\$ 402
Hourly Teacher Pay Rate	1100	\$ -	\$ 40.00	\$ 42.00	\$ 44.10	\$ 46.31	\$ 48.63

# Bullis Charter School

## Key Variables Worksheet — Staff Compensation Data

Ordinal Year	Year 0	Year I	Year II	Year III	Year IV	Year V
Fiscal Year	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
SACS	Governors	Governors	Governors	Governors	Governors	Governors
Budget Type	Budget	Budget	Budget	Budget	Budget	Budget
Code						
<b>Site Administration &amp; Other Certificated Salary Costs</b>						
Counselor	1200	\$ -	\$ -	\$ -	\$ -	\$ -
Librarian	1200	\$ -	\$ 61,200	\$ 64,260	\$ 67,473	\$ 70,847
Nurse	1200	\$ -	\$ -	\$ -	\$ -	\$ -
Principal	1300	\$ -	\$ 110,000	\$ 115,500	\$ 121,275	\$ 127,339
Teacher - Art	1100	\$ -	\$ 61,200	\$ 64,260	\$ 67,473	\$ 70,847
Teacher - Math Enrichment	1100	\$ -	\$ 61,200	\$ 64,260	\$ 67,473	\$ 70,847
Teacher - Music Enrichment	1100	\$ -	\$ 61,200	\$ 64,260	\$ 67,473	\$ 70,847
Teacher - P.E.	1100	\$ -	\$ 61,200	\$ 64,260	\$ 67,473	\$ 70,847
Teacher - Science Enrichment	1100	\$ -	\$ 61,200	\$ 64,260	\$ 67,473	\$ 70,847
Other (Identify)	1x00	\$ -	\$ -	\$ -	\$ -	\$ -
Other (Identify)	1x00	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Classified Salary Costs</b>						
2000-2999						
<b>Site Staff Salary Costs</b>						
Computer Specialist	2400	\$ -	\$ 54,000	\$ 56,700	\$ 59,535	\$ 62,512
Custodian	2200	\$ -	\$ 38,400	\$ 40,320	\$ 42,336	\$ 44,453
Maintenance/Custodian	2200	\$ -	\$ 40,800	\$ 42,840	\$ 44,982	\$ 47,231
Maintenance	2400	\$ -	\$ 43,200	\$ 45,360	\$ 47,628	\$ 50,009
Secretary	2400	\$ -	\$ 40,800	\$ 42,840	\$ 44,982	\$ 47,231
Other (Identify)	2100	\$ -	\$ -	\$ -	\$ -	\$ -
Other (Identify)	2x00	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Hourly Staff (\$/hr)</b>						
<b>Classified</b>						
Instructional Aides	2100	\$ -	\$ 12.00	\$ 12.30	\$ 12.61	\$ 12.93
Library Aide	2100	\$ -	\$ 12.00	\$ 12.30	\$ 12.61	\$ 12.93
School Health Aide	2x00	\$ -	\$ 20.00	\$ 20.50	\$ 21.01	\$ 21.54
Other (Identify)	2x00	\$ -	\$ -	\$ -	\$ -	\$ -

# Bullis Charter School

## Key Variables Worksheet --- Employee Benefit Data

Ordinal Year Fiscal Year	Year 0 2002-03	Year I 2003-04	Year II 2004-05	Year III 2005-06	Year IV 2006-07	Year V 2007-08	Comments	
							Governors	Budget
Budget Type	Use?	Governors	Budget	Governors	Budget	Governors	Budget	
<b>Retirement Options</b>								
State Teachers Retirement	Y	8.25%	8.25%	8.25%	8.25%	8.25%	8.25%	
Other Certificated Retirement	N	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Public Employees Retirement	Y	13.02%	13.02%	13.02%	13.02%	13.02%	13.02%	
Social Security (OASDI)	Y	6.20%	6.20%	6.20%	6.20%	6.20%	6.20%	
CASA Retirement Plan	N	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
CASA Contribution	N	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
CASA Administrative Cost	N	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
403(b) Contribution	N	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
403(b) Administrative Surcht	N	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Other Classified Retirement	N	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
<b>Other Mandatory Benefits</b>								
Medicare (HI)	Y	1.45%	1.45%	1.45%	1.45%	1.45%	1.45%	No limit on contribution; both employee and employer must pay. rate varies from 0.1% to 5.4%, depending on type of employee
State Unemployment (SUI)	Y	1.80%	1.80%	1.80%	1.80%	1.80%	1.80%	Contribution limited to first \$46,327.00 of wages (as of 2002), maximum tax of \$416.94 per employee
Worker's Compensation (W/C)	Y	2.50%	2.50%	2.50%	2.50%	2.50%	2.50%	
<b>Health Benefits</b>								
Annual Health Benefits COLA	n/a	0%	5%	5%	5%	5%	5%	Standard figure provided by William & Mercer
Health	N							
Dental	N							
Vision	N							
Other: Combined Health/Dent	N	\$ -	\$ 8,400	\$ 8,820	\$ 9,261	\$ 9,724	\$ 10,210	Flat amount paid per FTE
Life Insurance	N							
Other (Identify)	N							
Other (Identify)	N							

# Bullis Charter School

## Key Variables Worksheet — Books & Supplies

Ordinal Year Fiscal Year SACS Budget Type	Code	Year I 2003-04					Year II 2004-05					Year III 2005-06					Year IV 2006-07					Year V 2007-08					Comments	COLA
		Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget					
<b>Approved Textbooks and Core Curricula Materials</b>																												
4100	Textbooks (students)	\$ -	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	Annual amount per student	0%		
4100	Textbooks (teachers)	\$ -	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	Annual amount per teacher	0%		
4100	Other (Identify)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
<b>Books and Other Reference Materials</b>																												
4200	Other Books (students)	\$ -	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	Annual amount per student	0%		
4200	Other Books (teachers)	\$ -	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	Annual amount per teacher	0%		
4200	Other (Identify)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
<b>Materials and Supplies</b>																												
4300	Custodial Supplies	\$ -	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	\$ 5	Annual amount per student	0%		
4300	Instructional Supplies (students)	\$ -	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	Annual amount per student	0%		
4300	Instructional Supplies (teachers)	\$ -	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	Annual amount per teacher	0%		
4300	Office Supplies (students)	\$ -	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	Annual amount per student	0%		
4300	Office Supplies (teachers)	\$ -	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	Annual amount per teacher	0%		
4300	Postage and Shipping	\$ -	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	Annual amount per student	0%		
4300	Other (Identify)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
<b>Non Capitalized Equipment</b>																												
4400	Misc Equip Replacement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	One-half system per teacher per year	0%		
4400	Other (Identify)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
<b>Restricted Instructional Materials</b>																												
4300	State Instructional Materials	\$ -	\$ 8,835	\$ 18,290	\$ 18,290	\$ 18,910	\$ 18,910	\$ 18,910	\$ 19,530	\$ 19,530	\$ 19,530	\$ 20,150	\$ 20,150	\$ 20,150	\$ 20,150	\$ 20,150	\$ 20,150	\$ 20,150	\$ 20,150	\$ 20,150	\$ 20,150	\$ 20,150	\$ 20,150	\$ 20,150				
4300	State School Library Materials	\$ -	\$ 2,519	\$ 5,180	\$ 5,180	\$ 5,341	\$ 5,341	\$ 5,341	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506	\$ 5,506				

# Bullis Charter School

## Key Variables Worksheet — Operating Costs

Ordinal Year Fiscal Year	SACS Budget Type Code	Year 0 2002-03		Year I 2003-04		Year II 2004-05		Year III 2005-06		Year IV 2006-07		Year V 2007-08		Comments	COLA
		Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget			
<b>Travel and Conference</b>															
	5200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	5200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	5200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	5200	\$ -	\$ 333	\$ 700	\$ 735	\$ 772	\$ 811	\$ 811	\$ 811	\$ 811	\$ 811	\$ 811	\$ 811	Estimated monthly amounts	5%
	5300	\$ -	\$ 3,000	\$ 3,150	\$ 3,308	\$ 3,473	\$ 3,647	\$ 3,647	\$ 3,647	\$ 3,647	\$ 3,647	\$ 3,647	\$ 3,647	Estimated annual amount	5%
<b>Insurance</b>															
	5450	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	5450	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	5450	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	5450	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	5440	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	5450	\$ -	\$ 900	\$ 945	\$ 992	\$ 1,042	\$ 1,094	\$ 1,094	\$ 1,094	\$ 1,094	\$ 1,094	\$ 1,094	\$ 1,094	Estimated combined total monthly amount	5%
<b>Operation and Housekeeping Services</b>															
	5500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Estimated annual amount	5%
	5500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Estimated annual amount	5%
	5500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
<b>Rentals, Leases, Repairs and Noncapitalized Improvements</b>															
	5600	\$ -	\$ 600	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	Estimated monthly amount; copier lease	0%
	5600	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	5600	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	5600	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Estimated monthly amount	5%
	5600	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Estimated monthly amount	5%
	5600	\$ -	\$ 2.0%	\$ 2.0%	\$ 2.0%	\$ 2.0%	\$ 2.0%	\$ 2.0%	\$ 2.0%	\$ 2.0%	\$ 2.0%	\$ 2.0%	\$ 2.0%	Percentage of annual revenue for site lease	
	5600	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		

# Bullis Charter School

## Key Variables Worksheet — Operating Costs

Ordinal Year	Fiscal Year	SACS Budget Type Code	Year I		Year II		Year III		Year IV		Year V		Comments	COLA
			Governors	Budget	Governors	Budget	Governors	Budget	Governors	Budget	Governors	Budget		
<b>Professional/Consulting Services &amp; Operating Expenses</b>														
		5800	\$ -	\$ -	\$ 750	\$ 750	\$ 750	\$ 750	\$ 750	\$ 750	\$ 750	\$ 750	Estimated monthly amount	0%
		5800	\$ -	\$ -	\$ 179	\$ 188	\$ 183	\$ 188	\$ 188	\$ 188	\$ 188	\$ 193	Estimated Cost/Student (amt. from CASA)	3%
		5800	0.0%	0.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	Percentage of annual revenue for oversight, etc	
		5800	0.0%	0.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	Percentage of annual Title I revenue	
		5800	\$ -	\$ -	\$ 927	\$ 984	\$ 955	\$ 984	\$ 984	\$ 984	\$ 984	\$ 1,014	Estimated monthly amount	3%
		5800	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Estimated monthly amount	5%
		5800	\$ 350	\$ 424	\$ 424	\$ 513	\$ 466	\$ 513	\$ 513	\$ 513	\$ 513	\$ 564	Estimated annual fee per pupil	10%
		5800	\$ -	\$ 10.30	\$ 10.30	\$ 10.93	\$ 10.61	\$ 10.93	\$ 10.93	\$ 10.93	\$ 10.93	\$ 11.26	Estimated Cost/Student	3%
		5800	\$ -	\$ 26	\$ 53	\$ 57	\$ 55	\$ 57	\$ 57	\$ 57	\$ 57	\$ 59	Estimated annual fee per pupil	3%
		5800	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
		5800	\$ -	\$ 4,200	\$ 4,410	\$ 4,631	\$ 4,863	\$ 4,631	\$ 4,863	\$ 4,863	\$ 4,863	\$ 5,106	Estimated monthly amount	5%
		5800	\$ -	\$ 4,200	\$ 4,410	\$ 4,631	\$ 4,863	\$ 4,631	\$ 4,863	\$ 4,863	\$ 4,863	\$ 5,106	Estimated monthly amount	5%
		5800	\$ -	\$ 4,200	\$ 4,410	\$ 4,631	\$ 4,863	\$ 4,631	\$ 4,863	\$ 4,863	\$ 4,863	\$ 5,106	Estimated monthly amount	5%



# Bullis Charter School

## Key Variables Worksheet -- Capital Costs

Ordinal Year Fiscal Year SACS Code	Budget Type	Year I 2003-04		Year II 2004-05		Year III 2005-06		Year IV 2006-07		Year V 2007-08		Comments
		Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	Governors Budget	Budget	
<b>Capital Costs</b>												
Sites	6100											
Site Improvement	6100											
Buildings	6200											
Building Improvement	6200											
New Library Books & Med	6300											
Equipment	6400											
First Year Startup Costs	6x00											
Cost Per Classroom	6500	\$ 4,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Desks, chairs, tables, carts, etc; quote per Virco
Office & Library	6900	\$ 10,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Desks, chairs, tables, carts, etc; quote per Virco

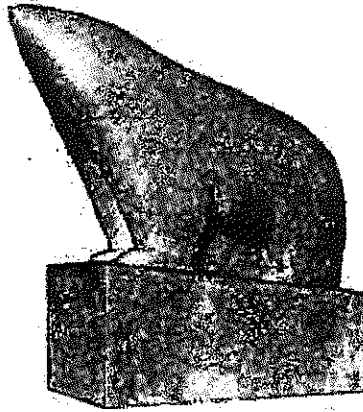
# Bullis Charter School

## Key Variables Worksheet — Debt Service & Other Costs

Ordinal Year	Year 0	Year I	Year II	Year III	Year IV	Year V	Comments
Fiscal Year	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	
SACS Code	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	
Budget Type	Budget	Budget	Budget	Budget	Budget	Budget	
<b>Debt Service - Principal Payments</b>							
Tax and Revenue Anticipation Note							
Charter School Start Up Loan							
Sponsor Agency Short Term Loan							
County Office Short Term Loan							
Other Short Term Loan							
Long Term Loan: Identify							
	7649						
	7641						
<b>Debt Service - Interest Payments</b>							
Tax and Revenue Anticipation Note							
Charter School Start Up Loan							
Sponsor Agency Short Term Loan							
County Office Short Term Loan							
Other Short Term Loan							
Long Term Loan: Identify							
	7649						
	7641						
<b>Other Costs</b>							
Tuition							
Special Education							
Transfers: Identify							
Other Costs: Identify							
	8710						

## Section V

### Detailed Expenditure Data



**Section V – Detailed Expenditure Data** shows the **calculation** of the various **costs**, by type expense, **based** on the **identified variables** from the previous **Sections III** and **IV**. For instance **all teacher costs**, retirement costs, books, **utilities**, operating, **capital equipment**, debt costs etc. defined as a variable in the previous section are calculated based upon the identified cost bases. The costs are shown for the budget year, 2003-2004 and for the subsequent four budget years through 2007-2008. This, and all sections, is structured for monthly review and update.

# Bullis Charter School

## Expenditures Worksheet – Compensation

Ordinal Year Fiscal Year SACS Budget Type	Year 0 2002-03 Governors Budget	Year I 2003-04 Governors Budget	Year II 2004-05 Governors Budget	Year III 2005-06 Governors Budget	Year IV 2006-07 Governors Budget	Year V 2007-08 Governors Budget
<b>Certificated Salaries</b>	1000-1999					
<b>Certificated Teacher Salaries</b>	1100-1199					
Teachers - Regular Program	1100	\$ -	\$ 428,400	\$ 899,640	\$ 944,622	\$ 991,858
Teachers - Independent Study	1100	-	-	-	-	-
Teachers - Independent Study	1100	-	-	-	-	-
Substitute Teacher Cost	1100	-	12,320	25,200	25,760	26,320
Extra Duty Days for Teachers						
Extra Duty	1100	-	-	-	-	-
Regular Staff Development	1100	-	-	-	-	-
Special Staff Development	1100	-	-	-	-	-
State Buy-Back Mandated Staff Develo	1100	-	6,947	14,589	15,318	16,084
Extra Duty Hours for Teachers						
Kindergarten	1100	-	-	-	-	-
1st Grade	1100	-	-	-	-	-
2nd Grade	1100	-	-	-	-	-
3rd Grade	1100	-	-	-	-	-
4th Grade	1100	-	-	-	-	-
5th Grade	1100	-	-	-	-	-
6th Grade	1100	-	-	-	-	-
<b>Total Certificated Teacher Salaries</b>	1000-1199	\$ -	\$ 447,667	\$ 939,429	\$ 985,700	\$ 1,034,262
<b>Other Certificated Site Salary Costs</b>						
Counselor	1200	\$ -	\$ -	\$ -	\$ -	\$ -
Librarian	1200	-	-	25,704	26,989	28,339
Nurse	1200	-	-	-	-	-
Principal	1300	-	110,000	115,500	121,275	127,339
Teacher - Art	1100	-	12,240	25,704	26,989	28,339
Teacher - Math Enrichment	1100	-	12,240	25,704	26,989	28,339
Teacher - Music Enrichment	1100	-	12,240	25,704	26,989	28,339
Teacher - P.E.	1100	-	12,240	25,704	26,989	28,339
Teacher - Science Enrichment	1100	-	12,240	25,704	26,989	28,339
Other (Identify)	1x00	-	-	-	-	-
<b>Total Other Certificated Site Salary Costs</b>		\$ -	\$ 171,200	\$ 269,724	\$ 283,210	\$ 297,372
<b>TOTAL CERTIFICATED SALARY COSTS</b>	1000-1999	\$ -	\$ 618,867	\$ 1,209,153	\$ 1,268,910	\$ 1,331,634

# Bullis Charter School

## Expenditures Worksheet – Compensation

Ordinal Year Fiscal Year SACS Budget Type	Code	Year 0 2002-03 Governors Budget	Year I 2003-04 Governors Budget	Year II 2004-05 Governors Budget	Year III 2005-06 Governors Budget	Year IV 2006-07 Governors Budget	Year V 2007-08 Governors Budget
<b>Classified Salary Costs</b>		2000-2999					
<b>Classified Site Staff Salary Costs</b>							
Computer Specialist	2400	\$ -	\$ 21,600	\$ 45,360	\$ 47,628	\$ 50,010	\$ 52,510
Custodian	2200	-	-	40,320	42,336	44,453	46,676
Maintenance/Custodian	2200	-	40,800	-	-	-	-
Maintenance	2400	-	-	22,680	23,814	25,005	26,255
Secretary	2400	-	40,800	42,840	44,982	47,231	49,593
Other (Identify)	2100	-	-	-	-	-	-
Other (Identify)	2x00	-	-	-	-	-	-
<b>Total Site Staff</b>		<b>\$ -</b>	<b>\$ 103,200</b>	<b>\$ 151,200</b>	<b>\$ 158,760</b>	<b>\$ 166,698</b>	<b>\$ 175,034</b>
Classified Substitutes	2900	-	4,000	4,000	4,000	4,000	4,000
<b>TOTAL CLASSIFIED SALARY COSTS</b>	2000-2999	<b>\$ -</b>	<b>\$ 107,200</b>	<b>\$ 155,200</b>	<b>\$ 162,760</b>	<b>\$ 170,698</b>	<b>\$ 179,034</b>
<b>Hourly Classified Staff Wage Costs</b>							
Instructional Aides	2100	\$ -	\$ 13,320	\$ 20,480	\$ 20,996	\$ 21,528	\$ 22,061
School Health Aide	2x00	-	-	-	-	-	-
Other (Identify)	2x00	-	-	-	-	-	-
<b>Total Hourly Staff Wage Costs</b>		<b>\$ -</b>	<b>\$ 13,320</b>	<b>\$ 20,480</b>	<b>\$ 20,996</b>	<b>\$ 21,528</b>	<b>\$ 22,061</b>
<b>TOTAL ALL CLASSIFIED WAGES</b>	2000-2999	<b>\$ -</b>	<b>\$ 120,520</b>	<b>\$ 175,680</b>	<b>\$ 183,756</b>	<b>\$ 192,227</b>	<b>\$ 201,095</b>

# Bullis Charter School

## Expenditures Worksheet – Employee Benefits

Ordinal Year	Year 0	Year I	Year II	Year III	Year IV	Year V	
Fiscal Year	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	
SACS	Governors	Governors	Governors	Governors	Governors	Governors	
Budget Type Code	Budget	Budget	Budget	Budget	Budget	Budget	
<b>Retirement Options</b>							
State Teachers Retirement	3101-3102	\$ -	\$ 51,057	\$ 99,755	\$ 104,685	\$ 109,860	\$ 115,290
Other Certificated Retirement	3901	-	-	-	-	-	-
Public Employees Retirement	3201-3202	-	13,957	20,207	21,191	22,225	23,310
Social Security	3301-3302	-	7,472	10,892	11,393	11,918	12,468
CASA Retirement Plan	3901-3902	-	-	-	-	-	-
Other Classified Retirement	3902	-	-	-	-	-	-
<b>Total Retirement Costs</b>		\$ -	\$ 72,486	\$ 130,854	\$ 137,269	\$ 144,003	\$ 151,068
<b>Other Mandatory Benefits</b>							
Medicare (HI)	3301-3302	\$ -	\$ 10,528	\$ 19,783	\$ 20,759	\$ 21,784	\$ 22,859
State Unemployment (SUI)	3501-3502	-	1,531	2,750	2,750	2,750	2,750
Worker's Compensation (W/C)	3601-3602	-	14,072	25,277	25,277	25,277	25,277
<b>Total Mandatory Benefit Costs</b>		\$ -	\$ 26,131	\$ 47,810	\$ 48,786	\$ 49,811	\$ 50,886
<b>Health Benefits</b>							
Health	3400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Dental	3400	-	-	-	-	-	-
Vision	3400	-	-	-	-	-	-
Life Insurance	3400	-	-	-	-	-	-
Other: Combined Health/Dental	3400	-	102,060	192,497	202,121	212,226	222,833
Other (Identify)	3400	-	-	-	-	-	-
Other (Identify)	3400	-	-	-	-	-	-
<b>Total Health Benefit Costs</b>	3400-3499	\$ -	\$ 102,060	\$ 192,497	\$ 202,121	\$ 212,226	\$ 222,833
<b>Total Benefit Costs</b>	3000-3999	\$ -	\$ 200,677	\$ 371,161	\$ 388,177	\$ 406,040	\$ 424,787

# Bullis Charter School

## Expenditures Worksheet – Other Operating Costs

Ordinal Year	Year 0	Year I	Year II	Year III	Year IV	Year V
Fiscal Year	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
SACS	Governors	Governors	Governors	Governors	Governors	Governors
Budget Type	Budget	Budget	Budget	Budget	Budget	Budget
Code						
<b>Books &amp; Supplies</b>	4000-4999					
Approved Textbooks and Core Curricula	4100	\$ -	\$ 8,025	\$ 16,050	\$ 16,050	\$ 16,050
Books and Other Reference Materials	4200	-	3,375	6,750	6,750	6,750
Materials and Supplies	4300					
Custodial Supplies	4300	-	775	1,550	1,550	1,550
Instructional Supplies	4300	-	4,425	8,850	8,850	8,850
Office Supplies	4300	-	2,600	5,200	5,200	5,200
Postage and Shipping	4300	-	1,550	3,100	3,100	3,100
Non Capitalized Equipment	4400	-	-	-	-	-
Misc Equip Replacement	4400	-	-	10,500	10,500	10,500
Restricted Instructional Materials	4300	-	16,391	33,827	34,931	37,095
<b>Total Books &amp; Supplies</b>	4000-4999	\$ -	\$ 37,141	\$ 85,827	\$ 86,931	\$ 88,047
						\$ 89,095

# Bullis Charter School

## Expenditures Worksheet – Other Operating Costs

Ordinal Year Fiscal Year SACS Budget Type Code	Year 0 2002-03 Governors Budget	Year I 2003-04 Governors Budget	Year II 2004-05 Governors Budget	Year III 2005-06 Governors Budget	Year IV 2006-07 Governors Budget	Year V 2007-08 Governors Budget
<b>Services &amp; Operational Expenses</b> 5000-5999						
Travel and Conference 52xx	\$ -	\$ 4,000	\$ 8,400	\$ 8,820	\$ 9,264	\$ 9,732
Dues and Memberships 5300	-	3,000	3,150	3,308	3,473	3,647
Insurance 54xx	-	10,800	11,340	11,904	12,504	13,128
Security Services 5500	-	-	-	-	-	-
Custodial Services 5500	-	-	-	-	-	-
Equipment (lease/rental) 5600	-	7,200	14,400	14,400	14,400	14,400
Equipment (repairs) 5600	-	-	-	-	-	-
Noncapitalized Improvements 5600	-	-	-	-	-	-
Property (Portable Classrooms - lease/rer) 5600	-	-	-	-	-	-
Property (Portable Classrooms - repairs) 5600	-	-	-	-	-	-
Property (Site - lease/rental) 5600	-	25,345	33,972	35,387	36,439	37,390
Audit Services 5800	-	6,000	9,000	9,000	9,000	9,000
Back Office Services 5800	-	27,125	55,490	56,730	58,280	59,830
District Oversight Fees 5800	-	12,673	16,986	17,694	18,219	18,695
Legal Services 5800	-	10,800	11,124	11,460	11,808	12,168
Printing and Reproduction 5800	-	-	-	-	-	-
Special Education Encroachment 5800	-	59,675	131,440	144,460	159,030	174,840
Student Attendance and Accounting Softw 5800	-	1,550	3,193	3,289	3,388	3,491
Student Testing & Assessment 5800	-	4,000	8,215	8,525	8,835	9,145
Utilities: All Combined 5800	-	50,400	52,920	55,572	58,356	61,272
Other Costs: Identify 5800	-	-	-	-	-	-
<b>Total Services &amp; Operational Expenses</b> 5000-5999	<b>\$ -</b>	<b>\$ 222,568</b>	<b>\$ 359,630</b>	<b>\$ 380,549</b>	<b>\$ 402,997</b>	<b>\$ 426,738</b>
<b>Fixed Asset Replacement:</b>						
Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>TOTAL</b>	<b>\$ -</b>	<b>\$ 259,709</b>	<b>\$ 445,457</b>	<b>\$ 467,480</b>	<b>\$ 491,043</b>	<b>\$ 515,832</b>



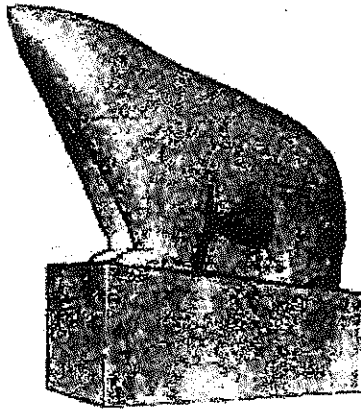
# Bullis Charter School

## Expenditures Worksheet – Capital Costs & Debt Service

Ordinal Year	Fiscal Year	SACS Budget Type Code	Year 0	Year I	Year II	Year III	Year IV	Year V
			2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
			Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget	Governors Budget
<b>Capital Costs</b>								
		Sites	6100	\$ -	\$ -	\$ -	\$ -	\$ -
		Site Improvement	6100	-	-	-	-	-
		Buildings	6200	-	-	-	-	-
		Building Improvement	6200	-	-	-	-	-
		New Library Books & Media	6300	-	-	-	-	-
		Equipment	6400	-	-	-	-	-
		First Year Classroom	6400	-	31,500	-	-	-
		First Year Office & Library	6400	-	10,000	-	-	-
		Other Identify	6400	-	-	-	-	-
<b>Total Capital Costs</b>				\$ -	\$ 41,500	\$ -	\$ -	\$ -
<b>Debt Service</b>								
		Charter School Start Up Loan		-	-	-	-	-
		Long Term Loan: Identify		-	-	-	-	-
<b>Total Debt Service Costs</b>				\$ -	\$ -	\$ -	\$ -	\$ -

## Section VI

### Cash Flow Projection



**Section VI – Cash Flow Statement** shows the estimated timing for the revenues and expenditures for the year 2003-04.

**Bullis Charter School  
Cash flow Statement 2003-04**

	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	Total
<b>Revenues</b>													
Block Grant													
In Lieu Tax Portion													
State Aid Portion													
State Block Categorical	\$1,832	\$3,665	\$2,443	\$2,443	\$2,443	\$2,443	\$55,269	\$55,269	\$55,269	\$48,361	\$48,361	\$48,361	\$690,868
CA Lottery (3 qtr time lag)								\$4,276	\$2,138	\$2,138	\$2,138	\$2,138	\$30,540
Class Size Reduction					\$17,691	\$1,455	\$51,523	\$0	\$0	\$0	\$0	\$1,811	\$72,480
Staff Development - Cert						\$2,183	\$0	\$2,753	\$0	\$0	\$0	\$1,343	\$6,279
Staff Development - Class						\$90	\$0	\$0	\$0	\$0	\$0	\$0	\$258
All Other State Revenues							\$14,889	\$0	\$0	\$1,947	\$0	\$0	\$16,836
State Charter School Grant						\$450,000							\$450,000
Federal Revenues					\$388	\$0	\$0	\$0	\$0	\$388	\$194	\$0	\$969
Local Fund Raising			\$27,900	\$55,800	\$139,500	\$0	\$0	\$0	\$27,900	\$27,900	\$0	\$0	\$279,000
Estimated Beginning Balance	\$80,000												
All Other Revenues	\$81,832	\$45,117	\$113,247	\$113,513	\$215,291	\$511,440	\$124,124	\$62,298	\$126,799	\$80,734	\$50,692	\$53,652	\$1,547,230
<b>Expenses</b>													
Certificated	\$0	\$0	\$61,268	\$61,268	\$61,268	\$61,268	\$61,268	\$61,268	\$61,268	\$61,268	\$61,268	\$61,268	\$618,867
Classified	\$3,822	\$3,820	\$11,208	\$11,208	\$11,208	\$11,208	\$11,208	\$11,208	\$11,208	\$11,208	\$11,208	\$11,208	\$120,520
Employee Benefits	\$0	\$0	\$19,867	\$19,867	\$19,867	\$19,867	\$19,867	\$19,867	\$19,867	\$19,867	\$19,867	\$19,867	\$200,677
Books and Supplies	\$12,999	\$12,999	\$1,114	\$1,114	\$1,114	\$1,114	\$1,114	\$1,114	\$1,114	\$1,114	\$1,114	\$1,114	\$37,141
Operating Costs	\$17,805	\$17,805	\$17,805	\$17,805	\$17,805	\$17,805	\$17,805	\$17,805	\$17,805	\$17,805	\$17,805	\$17,805	\$222,568
Capital Outlay	\$16,600	\$16,600	\$8,300	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$41,500
Total Expenses	\$51,227	\$51,225	\$119,563	\$111,263	\$111,263	\$111,263	\$111,263	\$111,263	\$111,263	\$111,263	\$111,263	\$111,263	\$1,241,273
Monthly Net Change	\$30,605	-\$6,108	-\$8,316	\$2,250	\$104,028	\$400,177	\$12,851	-\$48,964	\$15,486	-\$30,529	-\$60,571	-\$57,611	
Net Cash Position	\$30,605	\$24,497	\$18,181	\$20,431	\$124,459	\$524,637	\$537,498	\$488,534	\$504,030	\$473,501	\$412,930	\$355,320	

Note: Fund raising began in early February. We estimate that after paying for start up consulting fees and other expenses we will have \$80,000 cash in hand.

We anticipate that any delay in timing of the receipt of charter school grant will be covered by parent loans to the Foundation.

**BYLAWS**  
**OF**  
**THE BULLIS-PURISSIMA ELEMENTARY SCHOOL**  
(A California Non-Profit Public Benefit Corporation)

**ARTICLE I**  
**NAME**

Section 1. **NAME.** The name of this corporation is The Bullis-Purissima Elementary School (hereinafter "Bullis Charter School" or the "School").

**ARTICLE II**  
**PRINCIPAL OFFICE OF THE CORPORATION**

Section 1. **PRINCIPAL OFFICE OF THE CORPORATION.** The principal office for the transaction of the activities and affairs of this corporation is located at 183 Hillview Avenue, Los Altos, in Santa Clara County, California. The Board (the "Board") may change the location of the principal office. Any such change of location must be noted by the secretary on these bylaws opposite this Section; alternatively, this Section may be amended to state the new location.

Section 2. **OTHER OFFICES OF THE CORPORATION.** The Board may at any time establish branch or subordinate offices at any place or places where this corporation is qualified to conduct its activities.

**ARTICLE III**  
**GENERAL AND SPECIFIC PURPOSES; LIMITATIONS**

Section 1. **GENERAL AND SPECIFIC PURPOSES.** The purpose of this corporation is to manage, operate, guide, direct and promote the Bullis Charter School (a California public school). Also in the context of these purposes, the Corporation shall not, except to an insubstantial degree, engage in any other activities or exercise of power that do not further the purposes of the Corporation.

The Corporation shall not carry on any other activities not permitted to be carried on by: (a) a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code of 1986 (the "Code"), or the corresponding section of any future federal tax code; or (b) by a corporation, contributions to which are deductible under section 170(c)(2) of the Code, or the corresponding section of any future federal tax code. No substantial part of the activities of the Corporation shall consist of the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

**ARTICLE IV  
CONSTRUCTION AND DEFINITIONS**

Section 1. **CONSTRUCTION AND DEFINITIONS.** Unless the context otherwise, the general provisions, rule of construction, and definitions in the California Non-Profit Corporation Law shall govern the construction of these bylaws. Without limiting the generality of the preceding sentence, the masculine gender includes the feminine and neuter, the singular includes the plural, and the plural includes the singular, and the term "person" includes both a legal entity and a natural person.

**ARTICLE V  
DEDICATION OF ASSETS**

Section 1. **DEDICATION OF ASSETS.** This corporation's assets are irrevocably dedicated to public benefit purposes. No part of the net earnings, properties, or assets of the corporation, on dissolution or otherwise, shall inure to the benefit of any private person or individual, or to any director or officer of the corporation. On liquidation or dissolution, all properties and assets remaining after payment, or provision for payment, of all debts and liabilities of the corporation shall be distributed to a non-profit fund, foundation, or corporation that is organized and operated exclusively for charitable purposes and that has established its exempt status under Internal Revenue Code section 501(c)(3).

**ARTICLE VI  
CORPORATIONS WITHOUT MEMBERS**

Section 1. **CORPORATIONS WITHOUT MEMBERS.** This corporation shall have no voting members within the meaning of the Non-Profit Corporation Law. The corporation's Board may, in its discretion, admit individuals to one or more classes of nonvoting members; the class or classes shall have such rights and obligations as the Board finds appropriate.

**ARTICLE VII  
BOARD**

Section 1. **GENERAL POWERS** Subject to the provisions and limitations of the California Non-Profit Public Benefit Corporation Law and any other applicable laws, and subject to any limitations of the articles of incorporation or bylaws, the corporation's activities and affairs shall be managed, and all corporate powers shall be exercised, by or under the direction of the Board. The Board may delegate the management of the corporation's activities to any person(s), management company or committees, however composed, provided that the activities and affairs of the corporation shall be managed and all corporate powers shall be exercised under the ultimate direction of the Board.

Section 2. **SPECIFIC POWERS.** Without prejudice to the general powers set forth in Section 1 of these bylaws, but subject to the same limitations, the Board shall have the power to:

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1. Appoint and remove, at the pleasure of the Board, all corporate officers, agents, and non-teacher employees; appoint and remove teachers upon recommendation of the Principal or, if none, the Faculty Chair; prescribe powers and duties for them as are consistent with the law, the articles of incorporation, and these bylaws; fix their compensation; and require them security for faithful service.
2. Change the principal office or the principal business office in California from one location to another; cause the corporation to be qualified to conduct its activities in any other state, territory, dependency, or country; conduct its activities in or outside California; and designate a place in or outside California for holding any meeting of members.
3. Borrow money and incur indebtedness on the corporation's behalf and cause to be executed and delivered for the corporation's purposes, in the corporate name, promissory notes, bonds, debentures, deeds of trust, mortgages, pledges, hypothecations, and other evidences of debt and securities.
4. Adopt and use a corporate seal; prescribe the forms of membership certificates; and alter the forms of the seal and certificates.

**Section 3. NUMBER OF DIRECTORS; DESIGNATED DIRECTORS; AND TERMS.** Beginning not later than July 1, 2004, the number of directors shall be limited to eight (8). All directors shall be designated by the then existing Board, except that the following seat will be reserved: one (1) nonvoting director (the "District Director") may be appointed annually on a calendar-year basis by the Los Altos School District (the "District"), at the District's discretion. In the event that the District fails to appoint the District Director, in any year, on or before February 15 of such year, then the Board shall appoint such non-voting director for that year. In addition, two (2) directors' seats shall be reserved for parents of a child or children attending the School in the school year prior to the beginning of the term; such term shall cease if such child or children cease to be enrolled at the School (for example, as a result of withdrawal or graduation). One (1) director's seat shall be reserved for a member of the School's geographical community as defined as defined by the location of the School who does not have either a child or children at the School. No teacher or other employee of the School shall serve as a director.

Except for the initial Board and other than the District Director, each director shall hold office for three (3) years and until a successor director has been designated and qualified. Terms for the initial Board shall be three (3) seats for a term of three (3) years; two (2) seats for a term of two (2) years; and two (2) seats for a term of one year, as identified by the Board not later than June 15, 2004. The District Director's term shall always be one (1) year. All terms shall commence on July 1 and shall expire on June 30 of the last year of the term.

**Section 4. RESTRICTION ON INTERESTED PERSONS AS DIRECTORS.** No more than 49 percent of the persons serving on the Board may be "interested persons". An interested person is (a) any person compensated by the corporation for services rendered to it within the previous 12 months, whether as a full-time or part-time employee, independent

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contractor, or otherwise, excluding any reasonable compensation paid to a director as director; and (b) any brother, sister, ancestor, descendant, spouse, brother-in-law, sister-in-law, son-in-law, daughter-in-law, mother-in-law, or father-in-law of such person. However, any violation of this paragraph shall not affect the validity or enforceability of transactions entered into by the corporation.

Section 6. **DIRECTORS TERM.** Each director shall hold office for three (3) years and until a successor director has been designated and qualified. There shall be no limit on the number of terms one may serve.

Section 7. **NOMINATIONS BY COMMITTEE.** The Chair of the Board or, if none, the President may appoint a committee to nominate qualified candidates for election to the Board at least thirty (30) days before the date of any election of directors. The nominating committee shall make its report at least seven (7) days before that date of the election or at such other time as the Board may set and the Secretary shall forward to each board member, with the notice of meeting required by these bylaws, a list of all candidates nominated by committee.

Section 8. **USE OF CORPORATE FUNDS TO SUPPORT NOMINEE.** If more people have been nominated for director than can be elected, no corporation funds may be expended to support a nominee without the board's authorization.

Section 9. **EVENTS CAUSING VACANCIES ON BOARD.** A vacancy or vacancies on the Board shall occur in the event of (a) the death or resignation of any director; (b) the declaration by resolution of the Board of a vacancy in the office of a director who has been convicted of a felony, declared of unsound mind by a court order, or found by final order or judgment of any court to have breached a duty under California Non-Profit Public Benefit Corporation Law, Chapter 2, Article 3; (c) the increase of the authorized number of directors; or (d) the failure of the members, at any meeting of members at which any director or directors are to be elected, to elect the number of directors required to be elected at such meeting; and (e) disenrollment from the School of the student (if only one was attending) or all of the students of a parent serving on the Board in one of the two parent-director seats.

Section 10. **RESIGNATION OF DIRECTORS.** Except as provided below, any director may resign by giving written notice to the Chair of the Board, if any, or to the President or the Secretary of the board. The resignation shall be effective when the notice is given unless the notice specifies a later time for the resignation to become effective. If a director's resignation is effective at a later time, the Board may elect a successor to take office as of the date when the resignation becomes effective.

Section 11. **DIRECTOR MAY NOT RESIGN IF NO DIRECTOR REMAINS.** Except on notice to the California Attorney General, no director may resign if the corporation would be left without a duly elected director.

Section 12. **VACANCIES FILLED BY BOARD.** Vacancies on the Board may be filled by approval of the Board or, if the number of directors then in office is less than a quorum, by (1) the unanimous consent of the directors then in office, (2) the affirmative vote of a majority of the directors then in office at a meeting held according to notice or waivers of notice complying with Corporations Code section 5211, or (3) a sole remaining director.

Section 13. **NO VACANCY ON REDUCTION OF NUMBER OF DIRECTORS.** Any reduction of the authorized number of directors shall not result in any director being removed before his or her term of office expires.

Section 14. **PLACE OF BOARD MEETINGS.** Meetings shall be held at the principal office of the corporation. The Board may designate that a meeting be held at any place within California that has been designated by resolution of the Board or in the notice of the meeting. All meetings of the Board shall be called, held and conducted in accordance with the terms and provisions of the Ralph M. Brown Act California Government Code Sections 54950, et seq., as said chapter may be modified by subsequent legislation.

Section 15. **MEETINGS BY TELEPHONE OR OTHER TELECOMMUNICATIONS EQUIPMENT.** Any Board meeting may be held by conference telephone, video screen communication, or other communications equipment. Participation in a meeting under this Section shall constitute presence in person at the meeting if all of the following apply:

- (a) Each member participating in the meeting can communicate concurrently with all other members.
- (b) Each member is provided the means of participating in all matters before the Board, including the capacity to propose, or to interpose an objection to, a specific action to be taken by the corporation.
- (c) The Board has adopted and implemented a means of verifying both of the following:
  - (1) A person communicating by telephone, video screen, or other communications equipment is a director entitled to participate in the Board meeting.
  - (2) All statements, questions, actions or votes were made by that director and not by another person not permitted to participate as a director.
- (d) The meeting is held and conducted in accordance with the terms and provisions of the Ralph M. Brown Act California Government Code Sections 54950, et seq., as said chapter may be modified by subsequent legislation.



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Section 16. ANNUAL AND REGULAR MEETINGS. Regular meetings of the Board shall be held on the third Monday of the month at 5:00 p.m. unless the third Monday of the month should fall on a legal holiday in which event the regular meeting shall be held at the same hour and place on the next business day following the legal holiday. The Board shall hold an annual meeting, regular, special, and emergency meetings for purposes of organization, election of officers, and transaction of other business. Notice of this meeting is not required if conducted pursuant to these bylaws. Agendas must be posted seventy-two (72) hours previous to the meeting. All meetings of the Board shall be called, held and conducted in accordance with the terms and provisions of the Ralph M. Brown Act California Government Code Sections 54950, et seq., as said chapter may be modified by subsequent legislation.

Section 17. AUTHORITY TO CALL SPECIAL MEETINGS. Special and emergency meetings of the Board for any purpose may be called at any time by the Chair of the Board, if any, the President or any Vice-President, the Secretary, or any two Directors but may only be conducted if two-thirds of the Board members vote that a situation warranting a special or emergency meeting exists.

Section 18. NOTICE OF SPECIAL OR EMERGENCY MEETINGS. Notice of the time and place of special meetings shall be given to each director by (a) personal delivery of written notice; (b) first-class mail, postage prepaid; (c) telephone, including a voice messaging system or other system or technology designed to record and communicate messages, either directly to the director or to a person at the director's office who would reasonably be expected to communicate that notice promptly to the director; (d) telegram; (e) facsimile; (f) electronic mail; or (g) other electronic means. All such notices shall be given or sent to the director's address or telephone number as shown on the corporation's records and shall be sent with at least such notice as is required in accordance with the terms and provisions of the Ralph M. Brown Act California Government Code Sections 54950, et seq., as said chapter may be modified by subsequent legislation which are applicable to the type of meeting called.

Notice of the time and place of special or emergency meetings shall be given to all media who have provided written notice to the School.

The notice shall state the time of the meeting and the place, if the place is other than the corporation's principal office and the business to be transacted at the meeting.

All notice requirements will comply with the terms and provisions of the Ralph M. Brown Act California Government Code Sections 54950, et seq., as said chapter may be modified by subsequent legislation.

Section 19. QUORUM. A majority of the authorized number of directors shall constitute a quorum for the transaction of any business except adjournment. Every action taken or decision made by a majority of the directors present at a duly held meeting at which a quorum is present shall be an act of the board, subject to the more stringent provisions of the California Non-Profit Public Benefit Corporation Law, including, without limitation, those provisions relating to (a) approval of contracts or transactions in which a director has a direct or indirect

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material financial interest, (b) approval of certain transactions between corporations having common directorships, (c) creation of and appointments to committees of the board, and (d) indemnification of directors. A meeting at which a quorum is initially present may continue to transact business, despite the withdrawal of some directors, if any action taken or decision made is approved by at least a majority of the required quorum for that meeting.

Section 20. ADJOURNMENT. A majority of the directors present, whether or not a quorum is present, may adjourn any meeting to another time and place.

Section 21. COMPENSATION AND REIMBURSEMENT. Directors may receive such compensation, if any, for their services as directors or officers, and such reimbursement of expenses, as the Board may establish by resolution to be just and reasonable as to the corporation at the time that the resolution is adopted.

Section 22. CREATION OF POWERS OF COMMITTEES. The Board, by resolution adopted by a majority of the directors then in office, may create one or more committees, each consisting of two or more voting directors, but not half or more of the Board, and so many nonvoting committee members as the Board shall select, all to serve at the pleasure of the board. Appointments to committees of the Board shall be by majority vote of the authorized number of directors. The Board may appoint one or more directors as alternate members of any such committee, who may replace any absent member at any meeting. Any such committee shall have all the authority of the board, to the extent provided in the Board resolution, except that no committee may:

- (a) Take any final action on any matter that, under the California Non-Profit Public Benefit Corporation Law, also requires approval of the members or approval of a majority of all members;
- (b) Fill vacancies on the Board or any committee of the board;
- (c) Fix compensation of the directors for serving on the Board or on any committee;
- (d) Amend or repeal bylaws or adopt new bylaws;
- (e) Amend or repeal any resolution of the Board that by its express terms is not so amendable or repealable;
- (f) Create any other committees of the Board or appoint the members of committees of the board;
- (g) Expend corporate funds to support a nominee for director if more people have been nominated for director than can be elected; [or]

- (h) Approve any contract or transaction to which the corporation is a party and in which one or more of its directors has a material financial interest, except as special approval is provided for in Corporations Code section 5233(d)(3).

Section 23. **MEETINGS AND ACTION OF COMMITTEES.** Meetings and actions of committees of the Board shall be governed by, held, and taken under the provisions of these bylaws concerning meetings and other Board actions, except that the time for general meetings of such committees and the calling of special meetings of such committees may be set either by Board resolution or, if none, by resolution of the committee. Minutes of each meeting shall be kept and shall be filed with the corporate records. The Board may adopt rules for the governance of any committee as long as the rules are consistent with these bylaws. If the Board has not adopted rules, the committee may do so.

Section 24. **NON-LIABILITY OF DIRECTORS.** No Director shall be personally liable for the debts, liabilities, or other obligations of this corporation.

Section 25. **COMPLIANCE WITH LAWS GOVERNING STUDENT RECORDS.** The Charter School and the board of directors shall comply with all applicable provisions of the Family Education Rights Privacy Act ("FERPA") as set forth in Title 20 of the United States Code Section 1232g and attendant regulations as they may be amended from time to time.

## **ARTICLE VIII OFFICERS OF THE CORPORATION**

Section 1. **OFFICES HELD.** The officers of this corporation shall be a President, a Secretary, and a Chief Financial Officer or Treasurer. The corporation, at the board's direction, may also have a Chair of the board, one or more Vice-Presidents, one or more Assistant Secretaries, one or more Assistant Treasurers, and such other officers as may be appointed under Article IX, Section 4 of these bylaws.

Section 2. **DUPLICATION OF OFFICE HOLDERS.** Any number of offices may be held by the same person, except that neither the Secretary nor the Chief Financial Officer/Treasurer may serve concurrently as either the President or the Chair of the board.

Section 3. **ELECTION OF OFFICERS.** The officers of this corporation, except any appointed under Article IX, Section 4 of these bylaws, shall be chosen annually by the Board and shall serve at the pleasure of the board, subject to the rights of any officer under any employment contract.

Section 4. **APPOINTMENT OF OTHER OFFICERS.** The Board may appoint and authorize the Chair of the board, the President, or another officer to appoint any other officers that the corporation may require. Each appointed officer shall have the title and authority, hold office for the period, and perform the duties specified in the bylaws or established by the board.

Section 5. **REMOVAL OF OFFICERS.** Without prejudice to the rights of any officer under an employment contract, the Board may remove any officer with or without cause. An officer who was not chosen by the Board may be removed by any other officer on whom the Board confers the power of removal.

Section 6. **RESIGNATION OF OFFICERS.** Any officer may resign at any time by giving written notice to the Board. The resignation shall take effect on the date the notice is received or at any later time specified in the notice. Unless otherwise specified in the notice, the resignation need not be accepted to be effective. Any resignation shall be without prejudice to any rights of the corporation under any contract to which the officer is a party.

Section 7. **VACANCIES IN OFFICE.** A vacancy in any office because of death, resignation, removal, disqualification, or any other cause shall be filled in the manner prescribed in these bylaws for normal appointment to that office, provided, however, that vacancies need not be filled on an annual basis.

Section 8. **CHAIR OF THE BOARD.** If a Chair of the Board is elected, he or she shall preside at Board meetings and shall exercise and perform such other powers and duties as the Board may assign from time to time. If there is no President, the Chair of the Board shall also be the chief executive officer and shall have the powers and duties of the President of the corporation set forth in these bylaws.

Section 9. **PRESIDENT.** Subject to such supervisory powers as the Board may give to the Chair of the Board, if any, and subject to the control of the board, the President shall be the general manager of the corporation and shall supervise, direct, and control the corporation's activities, affairs, and officers as fully described in any applicable employment contract, agreement, or job specification. The President shall preside at all members' meetings and, in the absence of the Chair of the Board, or if none, at all Board meetings. The President shall have such other powers and duties as the Board or the bylaws may require.

Section 10. **VICE-PRESIDENTS.** If the President is absent or disabled, the Vice-Presidents, if any, in order of their rank as fixed by the board, or, if not ranked, a Vice-President designated by the board, shall perform all duties of the President. When so acting, a Vice-President shall have all powers of, and be subject to all restrictions on, the President. The Vice-Presidents shall have such other powers and perform such other duties as the Board or the bylaws may require.

Section 11. **SECRETARY.** The Secretary shall keep or cause to be kept, at the corporation's principal office or such other place as the Board may direct, a book of minutes of all meetings, proceedings, and actions of the Board, of committees of the Board. The minutes of meetings shall include the time and place that the meeting was held; whether the meeting was annual, general, or special, and, if special, how authorized; the notice given; the names of persons present at Board and committee meetings; The Secretary shall keep or cause to be kept, at the principal California office, a copy of the articles of incorporation and bylaws, as amended to date.

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The Secretary shall give, or cause to be given, notice of all meetings of members, of the board, and of committees of the Board that these bylaws require to be given. The Secretary shall keep the corporate seal, if any, in safe custody and shall have such other powers and perform such other duties as the Board by bylaws may require.

Section 12. **CHIEF FINANCIAL OFFICER/TREASURER.** The Chief Financial Officer (also known as the Treasurer) shall keep and maintain, or cause to be kept and maintained, adequate and correct books and accounts of the corporation's properties and transactions. The Chief Financial Officer shall give or cause to be given to the Directors such financial statements and reports as are required to be given by law, by these bylaws, or by the Board. The books of account shall be open to inspection by any director at all reasonable times.

The Chief Financial Officer shall (i) deposit, or cause to be deposited, all money and other valuables in the name and to the credit of the corporation with such depositories as the Board may designate; (ii) disburse the corporation's funds as the Board may order; (iii) render to the President, Chair of the Board, if any, and the board, when requested, an account of all transactions as Chief Financial Officer and of the financial condition of the corporation; and (iv) have such other powers and perform such other duties as the board, contract, job specification, or the bylaws may require.

If required by the Board, the Chief Financial Officer shall give the corporation a bond in the amount and with the surety or sureties specified by the Board for faithful performance of the duties of the office and for restoration to the corporation of all of its books, papers, vouchers, money, and other property of every kind in the possession or under the control of the Chief Financial Officer on his or her death, resignation, retirement, or removal from office.

## **ARTICLE IX CONTRACTS WITH DIRECTORS AND OFFICERS**

Section 1. **CONTRACTS WITH DIRECTORS AND OFFICERS.** No director of this corporation nor any other corporation, firm, association, or other entity in which one or more of this corporation's directors are directors have a material financial interest, shall be interested, directly or indirectly, in the contract or transaction, unless (a) the material facts regarding that director's financial interest in such contract or transaction or regarding such common directorship, officership, or financial interest are fully disclosed in good faith and noted in the minutes, or are known to all members of the Board prior to the board's consideration of such contract or transaction; (b) such contract or transaction is authorized in good faith by a majority of the Board by a vote sufficient for that purpose without counting the votes of the interested directors; (c) before authorizing or approving the transaction, the Board considers and in good faith decides after reasonable investigation that the corporation could not obtain a more advantageous arrangement with reasonable effort under the circumstances; and (d) the corporation for its own benefit enters into the transaction, which is fair and reasonable to the corporation at the time the transaction was entered into.

This Section does not apply to a transaction that is part of an educational or charitable

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program of this corporation if it (a) is approved or authorized by the corporation in good faith and without unjustified favoritism and (b) results in a benefit to one or more directors or their families because they are in the class of persons intended to be benefited by the educational or charitable program of this corporation.

## **ARTICLE X LOANS TO DIRECTORS AND OFFICERS**

Section 1. **LOANS TO DIRECTORS AND OFFICERS.** This corporation shall not lend any money or property to or guarantee the obligation of any director or officer without the approval of the California Attorney General; provided, however, that the corporation may advance money to a director or officer of the corporation for expenses reasonably anticipated to be incurred in the performance of his or her duties if that director or officer would be entitled to Reimbursement for such expenses of the corporation.

## **ARTICLE XI INDEMNIFICATION**

Section 1. **INDEMNIFICATION.** To the fullest extent permitted by law, this corporation shall indemnify its directors, officers, employees, and other persons described in Corporations Code section 5238(a), including persons formerly occupying any such positions, against all expenses, judgments, fines, paying any such positions, against all expenses, judgments, fines, settlements, and other amounts actually and reasonably incurred by them in connection with any "proceeding" as that term is used in that section, and including an action by or in the right of the corporation by reason of the fact that the person is or was a person described in that section. "Expenses," as used in these bylaws, shall have the same meaning as in that section of the Corporations Code.

On written request to the Board by any person seeking indemnification under Corporations Code section 5238 (b) or section 5238 (c) the Board shall promptly decide under Corporations Code section 5238 (e) whether the applicable standard of conduct set forth in Corporations Code section 5238 (b) or section 5238 (c) has been met and, if so, the Board shall authorize indemnification.

## **ARTICLE XII INSURANCE**

Section 1. **INSURANCE.** This corporation shall have the right to purchase and maintain insurance to the full extent permitted by law on behalf of its officers, directors, employees, and other agents, to cover any liability asserted against or incurred by any officer, director, employee, or agent in such capacity or arising from the officer's, director's, employee's, or agent's status as such.

## **ARTICLE XIII**

**MAINTENANCE OF CORPORATE RECORDS**

Section 1. **MAINTENANCE OF CORPORATE RECORDS.** This corporation shall keep:

- (a) Adequate and correct books and records of account;
- (b) Written minutes of the proceedings of the Board and committees of the Board; and
- (c) Such reports and records as required by law.

**ARTICLE XV  
INSPECTION RIGHTS**

Section 1. **DIRECTORS RIGHT TO INSPECT.** Every director shall have the right at any reasonable time to inspect the corporation's books, records, documents of every kind, physical properties, and the records of each subsidiary as permitted by California and federal law.

The inspection may be made in person or by the director's agent or attorney. The right of inspection includes the right to copy and make extracts of documents as permitted by California and federal law. This right to inspect may be circumscribed in instances where the right to inspect conflicts with California or federal law pertaining to access to books, records, and documents.

Section 2. **MAINTENANCE AND INSPECTION OF ARTICLES AND BYLAWS.** This corporation shall keep at its principal California office the original or a copy of the article of incorporation and bylaws, as amended to the current date, which shall be open to inspection by the Board at all reasonable times during office hours. If the corporation has no business office in California, the Secretary shall, on the written request of any Board member, furnish to that member a copy of the articles of incorporation and bylaws, as amended to then current date.

**ARTICLE XV  
REQUIRED REPORTS**

Section 1. **ANNUAL REPORTS.** The Board shall cause an annual report to be sent to the Board within 120 days after the end of the corporation's fiscal year. That report shall contain the following information, in appropriate detail:

- (a) The assets and liabilities, including the trust funds, or the corporation as of the end of the fiscal year;
- (b) The principal changes in assets and liabilities, including trust funds;

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- (c) The corporation's revenue or receipts, both unrestricted and restricted to particular purposes;
- (d) The corporation's expenses or disbursement for both general and restricted purposes;
- (e) Any information required under these bylaws; and
- (f) An independent accountants' report or, if none, the certificate of an authorized officer of the corporation that such statements were prepared without audit from the corporation's books and records.

Section 2. ANNUAL STATEMENT OF CERTAIN TRANSACTIONS AND INDEMNIFICATIONS. As part of the annual report to all members, or as a separate document if no annual report is issued, the corporation shall, within 120 days after the end of the corporation's fiscal year, annually prepare and mail or deliver to each member and furnish to each director a statement of any transaction or indemnification of the following kind:

- (a) Any transaction (i) in which the corporation, or its parent or subsidiary, was a party, (ii) in which an "interested person" had a direct or indirect material financial interest, and (iii) which involved more than \$50,000 or was one of several transactions with the same interested person involving, in the aggregate, more than \$50,000. For this purpose, an "interested person" is either:
  - (1) Any director or officer of the corporation, its parent, or subsidiary (but mere common directorship shall not be considered such an interest); or
  - (2) Any holder of more than 10 percent of the voting power of the corporation, its parent, or its subsidiary. The statement shall include a brief description of the transaction, the names of interested persons involved, their relationship to the corporation, the nature of their interest, provided that if the transaction was with a partnership in which the interested person is a partner, only the interest of the partnership need be stated.

#### CERTIFICATE OF SECRETARY

I certify that I am the duly elected and acting Secretary of the Bullis-Purissima Elementary School, a California non-profit public benefit corporation; that these bylaws, consisting of 14 pages, are the bylaws of this corporation as adopted by the Board on \_\_\_\_\_; and that these bylaws have not been amended or modified since that date.



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Executed on \_\_\_\_\_ at Los Altos Hills, California.

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Stanley Q. Mok, Secretary

**MEMORANDUM OF UNDERSTANDING  
BETWEEN THE LOS ALTOS SCHOOL DISTRICT  
AND THE BULLIS CHARTER SCHOOL**

This agreement is executed between the Board of Trustees of the Los Altos School District ("District") and the Board of Directors of the Bullis Charter School ("Charter School").

**RECITALS:**

1. The Los Altos School District is a school district existing under the laws of the State of California.
2. The petition for the Charter School was approved by the District Board of Trustees on \_\_\_\_\_, 2003 and a charter was granted for a period of (5) years.
3. The purpose of this agreement is to outline the parties' agreements governing their respective fiscal and administrative responsibilities, to define the specific operational relationship between the District and Charter School, and to resolve other matters of mutual interest not otherwise resolved within the terms of the School's charter petition. In the event that any portion of this agreement differs from the provisions of the approved charter, the approved charter will be deemed to be the controlling document.
4. The Charter School will commence its first year of operation in the 2003-2004 school year in accordance with the provisions of the approved charter, this agreement and any additional conditions agreed to by the parties.

**AGREEMENTS:**

1. **Term.** This agreement will be in effect for the 2003-2004 school year. This agreement will renew automatically unless either party indicates in writing a need to revise the Memorandum of Understanding ("MOU"). Written notice must be provided to the respective boards prior to May 1 annually.
2. **Amendments.** Appropriate representatives of the District and the Charter School will meet as necessary to implement this agreement and to make necessary written modifications. Any modification of this agreement must be in writing and executed by duly authorized representatives of both parties to be effective. The Superintendent of the District is the duly authorized representative for the District. The Chair of the Charter School Board of Directors or the Charter School Principal is the duly authorized representative for the Charter School.
3. **Charter School Account at the County Office of Education.** The Charter School shall maintain an account with the County Treasury, under the supervision of the County Office of Education.

4. **Average Daily Attendance and Enrollment Reporting.**
  - A. The Charter School will be responsible for its daily attendance accounting. Reporting by the Charter School of average daily attendance shall be made to the County Office of Education through the District. The Charter School will be responsible for preparation and transmission to the county office of all attendance reports Period 1, Period 2, and annual.
  - B. The Charter School agrees to maintain all financial and attendance records in the new Standardized Account Code System (SACS) object codes or as required by law. The Charter School acknowledges sole responsibility for the completeness and accuracy of such reports as well as any other reports required by either state or federal offices.
5. **Funding.** The Parties agree that the funding entitlement per student attending the Charter School shall be the in lieu property taxes as specified in Education Code Section 47635 and state aid in the amount of the block grant entitlement specified by the State. The transfer of revenue shall be in accordance with the funding formula and schedule found in the Education Code and regulatory provisions of AB1115. The Charter School has elected to receive funding from the State directly, pursuant to Education Code Section 47651.
6. **Fiscal Oversight.** The Charter School shall establish a fiscal committee to monitor all fiscal operations of the program, including budget development and oversight. The Charter School will forward to the District the following reports by the designated dates: The First Interim Report (through 10/31) shall be due by December 1; the Second Interim Report (through 1/31) shall be due March 1; the Preliminary Budget for the following school year shall be due May 1; the Adopted Budget shall be due June 15; the Unaudited Actuals shall be due September 1.
7. **Special Education.** The Charter School will operate as a school within the District for the provision of Special Education Services in accordance with Exhibit A, Agreement for Special Education Services, as incorporated herein.
8. **Insurance and Risk Management.** The Charter School shall procure, at its own expense, a policy of comprehensive liability insurance and property damage coverage. The insuring limits, at a minimum shall not be less than One Million Dollars (\$1,000,000.00) for personal injury; not less than Two Million Dollars (\$2,000,000.00) for general aggregate coverage; and not less than Ten Thousand Dollars (\$10,000.00) for fire damage. The Charter School shall be responsible for procuring worker's compensation coverage at its own expense. A copy of the Charter School's insurance coverage will be provided to the District prior to the opening of School annually. The Charter School shall establish and supervise a risk management program. Report of the risk management program operation shall be included with year-end financial reports to the District. The District shall be named as an additional insured on the general liability insurance policy of the Charter School.

9. **Compensation to the District.** The Charter School agrees to remit to the District its actual costs for supervisory oversight of the Charter School up to 1% of the Charter School's annual state and federal revenue, or if the District provides the Charter School with substantially rent-free facilities this percentage shall be increase to 3%. This fee shall be paid quarterly within 30 days from receipt of an invoice from the District. The District and Charter School agree that "supervisory oversight," as used in Education Code Section 47613, shall include the following: activities relating to monitoring the performance and compliance of the Charter School with respect to the terms and conditions of its charter, related agreements, and all applicable laws; any activity related to the potential revocation or renewal of the charter; and any other duty the District is required to perform with respect to the Charter School under applicable law.
10. **Percentage of Grant Funds.** To the extent the District assists the Charter School in obtaining grant funding, the Charter School shall pay the District 1% of the grant funds, within thirty (30) days of receipt or another percentage specified under the terms of the grant.
11. **Contracted Services.**
  - A. At the discretion of the District, the Charter School may choose to procure operating services from the District at a charge to be determined by the District. The District will have the option to respond to any and all Request for Proposals ("RFP") issued by the Charter School. If a contract is awarded to the District, the District will invoice for all such services on a quarterly basis. Agreement concerning the services requested and the charge to be levied by the District would be based on the conditions set forth in the RFP or by mutual agreement.
  - B. The Charter School retains the option to contract for services with private and public agencies.
12. **Conformance to Charter.** The Board of Directors of the Charter School shall be responsible for operating in conformance with the provisions of its charter and this operating agreement.
13. **Legal Relationship.**
  - A. The parties recognize that the Charter School and the District are separate legal entities, and that it has obtained nonprofit corporation status for the purposes of separating its legal debts and obligations from those of the District under Education Code Section 47604(c). In respect to its operations under this agreement, the Charter School shall, to the fullest extent permitted by law, hold harmless, indemnify, and defend the District, its officers, directors, and employees from and against any and all claims, demands, actions, suits, losses, liability expenses and costs, including without limitation attorneys' fees and costs arising out of injury to any person, including death or damage to any property caused by, connected with, or attributable to the willful misconduct, negligent acts, errors or omissions of the Charter School or its officers, employees, agents or consultants under this agreement, excepting only those claims, demands,

actions, suits, losses, liability expenses and costs caused by the sole negligence of the District, its officers, directors or employees.

- B. The Charter School will retain separate legal counsel for the conduct of all business.
- C. The Charter School's Board of Directors shall comply with the Brown Act.

14. **Employment Standards.**

- A. In accordance with Education Code Section 47605(f) - The procedures that the Charter School will follow to ensure the health and safety of pupils and staff shall include the requirement that each employee of the School furnish the School with a criminal record summary as described in Education Code Section 44237. The Charter School shall also comply with Education Code Section 45125.1 in ensuring the same procedures for employees of an entity that provide services to the Charter School that may come into contact with pupils.
- B. In accordance with Education Code Section 47605(l) - Teachers in charter schools shall be required to hold a Commission on Teacher Credentialing certificate, permit, or other document equivalent to that which a teacher in other California public schools would be required to hold. These documents shall be maintained on file at the Charter School and shall be subject to periodic inspection by the District.
- C. At the request of the Charter School, the District shall create any reports required by STRS or PERS and may charge the Charter School for the actual costs of the reporting services

15. **Severability and Assignment.**

- A. If any provision or any part of this agreement is, for any reason, held to be invalid and/or unenforceable or contrary to public policy, law, or statute and/or ordinance, the remainder of this agreement shall not be affected thereby and shall remain valid and fully enforceable.
- B. This agreement shall not be assigned by either party.

16. **Dispute Resolution.** The parties shall resolve disputes related to this Memorandum of Understanding pursuant to the Dispute Resolution Process set forth in the charter.

17. **FERPA: Family Educational Rights and Privacy Act.** The District hereby designates employees of the Charter School as having a legitimate educational interest such that they are entitled to access to education records under 20 U.S.C.A.1232g, the Family Educational Rights and Privacy Act and California Education Code 49076(b)(6) ("FERPA"). The Charter School hereby designates the employees of the District as having a legitimate educational interest such that they are entitled to access to education records under FERPA, both as to District pupils who are enrolled in the Charter School

and as to examination of student records in discharge of the District's general oversight responsibilities. The Charter School, its officers and employees shall comply with FERPA at all times.

18. **Notices.** All written notices shall be delivered to the following:

On behalf of the Charter School:      School Principal  
Bullis Charter School  
25890 Fremont Road  
Los Altos Hills, CA 94022

On behalf of the District:              Los Altos School District  
201 Covington Road  
Los Altos, CA 94024

Superintendent: Dr. Margaret H. Gratiot

All notices shall be considered delivered five (5) business days from the date of postmark excluding duly noticed unavailability of either party.

19. **Requests for Information.** The Charter School shall respond to all reasonable requests for information from the District within fifteen (15) days of receipt of the request. The Charter School may request additional time to respond if needed. The District shall not unreasonably deny such a request. The District may request a shorter time for response in cases of an imminent threat to health and safety.

**APPROVED AS TO FORM:**

\_\_\_\_\_  
(LEGAL ADVISOR), Name/Date

Dated: \_\_\_\_\_

**BOARD APPROVED:**

**LOS ALTOS SCHOOL DISTRICT**

By \_\_\_\_\_

Dated: \_\_\_\_\_

**BULLIS CHARTER SCHOOL:**

By \_\_\_\_\_

Dated: \_\_\_\_\_

AGREEMENT FOR SPECIAL EDUCATION SERVICES

This is an agreement between the Los Altos School District (hereinafter "District") and the Bullis Charter School (hereinafter "Charter School") to set forth the responsibilities of the parties with respect to the delivery and financing of special education services to children enrolled in the Charter School. The Charter School and the District are collectively referred to as the "parties."

**I. RECITALS**

- A. The District is the granting agency of the Charter School.
- B. A charter school that includes in its charter petition verifiable written assurances that the charter school will participate as a local educational agency in a special education plan approved by the State Board of Education shall be deemed a local educational agency for the purposes of compliance with federal law, Individuals with Disabilities Education Act ("IDEA") (20 U.S.C. Sec. 1400, et seq.) and for eligibility for federal and state special education funds. A charter school that does not provide such verifiable written assurances shall be deemed a public school of the local educational agency that granted the charter (Education Code Section 47641).
- C. The Charter School has not provided verifiable written assurances that the Charter School will participate as a local educational agency in a special education plan approved by the State Board of Education. Therefore, the Charter School shall be deemed a public school of the District.
- D. A Charter School that is deemed to be a public school of the local educational agency that granted the charter shall participate in state and federal funding in the same manner as any other public school of the granting agency. Further, a child with disabilities attending the charter school shall receive special educational instruction or designated instruction and services, or both, in the same manner as a child with disabilities who attends another public school of that district. The agency that granted the charter shall ensure that all children with disabilities enrolled in the Charter School receive special education and designated instruction and services in a manner that is consistent with their individualized education program and in compliance with the IDEA.
- E. This agreement has the purpose of clarifying the roles and responsibilities of the parties with regard to students who are enrolled and attend the Charter School and are or may be eligible for special education and related services under the IDEA.

**II. TERMS**

**A. Length of Agreement**

This agreement shall continue concurrently with the term of the charter, but may be amended by mutual written agreement of the District and Charter School at any time.

**B. Section 504 and the ADA**

It is agreed that this Agreement is intended to address the responsibilities of the parties with respect to the provision and financing of special education services under the IDEA and does not cover services or accommodations required under Section 504 of the Rehabilitation Act ("Section 504") nor under the Americans with Disabilities Act ("ADA"). Absent agreement of the parties to the contrary, the Charter School shall be solely responsible, at its own expense, for compliance with Section 504 and the ADA with respect to eligible students.

**C. Designated Representative**

The District's designated representative shall be the superintendent and shall have the authority to act on behalf of the District. The Charter School shall designate a representative in writing and this representative shall have the authority to act on behalf of the Charter School, except to the extent action by the Governing Board of the Charter School is legally required.

**D. Interpretation of Agreement**

This Agreement is intended to supplement the terms of any other MOU between the parties. This Agreement shall be intended solely in accordance with its terms, together with the charter. Nothing in this Agreement is intended to supercede any term or condition of the charter granted to the Charter School.

**E. In-Service Training**

The Charter School shall designate a representative to attend an in-service conducted by the District or the SELPA on the referral system and criteria. If the SELPA or District is unable to provide in-service training in this or any other area of special education, the Charter School shall seek such training on its own.

**F. Services**

1. The Charter School and the District intend that the School will be treated as any other public school in the District with respect to the provision of special education services, including the allocation of duties between on-site staff and resources and the District staff and resources.



2. **Division and Coordination of Responsibility:** The District and the School agree to allocate responsibility for the provision of services (including but not limited to identification, evaluation, Individualized Education Plan (“IEP”) development and modification, and educational services) in a manner consistent with their allocation between the District and its local public school sites. Where particular services are generally provided by staff at the local school site level, the Charter School will be responsible for providing said staff and programming; where particular services are provided to the school by the central district office, those services will be made available to the Charter School in a similar fashion.
3. The Charter School and the District intend that they will jointly ensure that all students entitled to services under the IDEA and California Education Code Section 56000 et seq. will receive those services.
4. **Identification and Referral:** The Charter School shall have the same responsibility as any other public school in the District to work cooperatively with the District in identifying and referring students who have or may have exceptional needs that qualify them to receive special education services. The Charter School will develop, maintain, and implement policies and procedures to ensure identification and referral of students who have, or may have, such exceptional needs. These policies and procedures will be in accordance with California law and District policy. As between the Charter School and the District, the Charter School is solely responsible for obtaining the cumulative files, prior and/or current IEP and other special education information on any student enrolling from a non-District school. A pupil shall be referred for special education instruction and services only after the resources of the regular education program have been considered and utilized where appropriate.
5. The District shall provide the Charter School with any assistance that it generally provides its other public schools in the identification and referral processes. The District will ensure that the Charter School is provided with notification and relevant files of all students transferring to the Charter School from a District school, who have an existing IEP, in the same manner that it ensures the forwarding of such information between District schools. All records and files will be released with the signed permission of the parent/guardian.
6. The District and Charter School shall make the determination as to what assessments are necessary, including assessments for all referred students, annual assessments and tri-annual assessments, in accordance with the District’s general practice and procedure and applicable law. The Charter School shall not conduct unilateral independent assessments without prior written approval of the District.

7. Responsibility for arranging necessary I.E.P. meetings shall be allocated in accordance with the District's general practice and procedure and applicable law. The Charter School shall be responsible for having the designated representative of the Charter School in attendance at the IEP meetings in addition to representatives who are knowledgeable about the regular education program at the Charter School.
8. Decisions regarding eligibility, goals/objectives, program, placement and exit from special education shall be the decision of the IEP team. Team membership shall be in compliance with state and federal law and shall include the designated representative of the Charter School (or designee) and the designated representative of the District (or designee). Services and placements shall be provided to all eligible Charter School students in accordance with the policies, procedures and requirements of the District and of the Local Plan for Special Education.
9. For students who enroll in the Charter School with a current IEP, the District and the Charter School shall conduct an IEP meeting in accordance with applicable law. The Charter School shall notify the District immediately of students who may fall into this category. The District will provide consultative assistance to the Charter School to help transition the student.
10. To the extent that the agreed upon IEP requires educational or related services to be delivered by staff other than the Charter School staff, the District shall provide and/or arrange for such services in the same manner that it would be legally obligated to provide to the students at its other District schools. District services shall include consultative services by District staff to Charter School staff in the same manner that District staff consults with staff at other District schools.
11. The Charter School shall instruct parents/guardians to raise concerns regarding special education services, related services and rights to the Charter School staff. Charter School staff shall then in turn consult with the designated representative of the District regarding such concerns. The District representative in consultation with the Charter School's designated representative shall respond to and address the parent/guardian concerns.
12. Complaints: In consultation with the Charter School, the District shall address/respond/investigate all complaints received under the Uniform Complaint procedure involving special education.
13. Due Process Hearings: In consultation with the Charter School, the District may initiate a due process hearing on behalf of a student enrolled in the Charter School as the District determines is legally necessary to meet a school agency's responsibilities under federal and state law. The District and the

Charter School shall work together to defend any due process hearing brought by a student enrolled in the Charter School. In the event that the District determines that legal counsel representation is needed, the District/Charter School shall be jointly represented by legal counsel, unless there is a conflict of interest. In the case separate counsel is needed by the Charter School, the Charter School shall be responsible for the separate costs of its legal counsel.

14. The District Superintendent or designee shall represent the Charter School at all SELPA meetings as it represents the needs of all schools in the District. Reports to the Charter School regarding SELPA decisions, policies, etc. shall be communicated to the Charter School as they are to all other schools within the District. To the extent that the District and/or SELPA provide training opportunities and/or information regarding special education to site staff, such opportunities/information shall be made available to Charter School staff. To the extent that District site staff have the opportunity to participate in committee meetings of the SELPA as representatives of their district, such opportunities shall be made available to Charter School staff.
15. The District shall be responsible for providing all services under this Agreement to all students of the Charter School regardless of their school district of residence.
16. The Charter School agrees to adhere to the policies and requirements of the Local Plan for Special Education and to District policies.
17. If needed due to limited special education staff, the District may seek out contracts with other school districts, companies, or organizations to serve Charter School students. The Charter School shall assist the District in procuring such services.

**G. Funding**

1. Retention of Special Education Funds by District:

The parties agree that, pursuant to the division of responsibilities set forth in this Agreement, the School has elected the status of any other public school in the District for the purposes of special education services and funding, and the District has agreed to provide special education services for the School, consistent with the services it provides at its public schools. Consistent with this division of responsibility, The District shall retain all state and federal special education funding allocated for Charter School students through the SELPA.

2. **School Contribution to Encroachment:** The Charter School shall owe the District a pro-rata share of the District's unfunded special education costs ("encroachment").

At the end of each fiscal year, the District shall calculate the Charter School's pro-rata share of the District-wide encroachment for that year as calculated by the total unfunded special education costs of the District (including those costs attributable to the Charter School) divided by the total number of District ADA (including Charter School students) and multiplied by the total number of Charter School ADA. Charter School ADA shall include all students, regardless of home district. Adjustments will be made to include, on a pro-rated basis, students who enroll or disenroll after the student-enrollment calculation is made. This amount shall be calculated at the end of the fiscal year and paid in monthly installments throughout the following fiscal year.

3. The District shall be responsible for all costs related to the service of Charter School students in the same manner as it is responsible for the cost of serving other students of the District.
4. Special education funds for special education staff and services provided at the local school site level by the Charter School with the agreement of the District shall be allocated to the Charter School by the District on an annual basis.

March 12, 2003

Dr. Margaret H. Gratiot, Superintendent  
And Members of the Board of Trustees  
Los Altos School District  
201 Covington Road  
Los Altos, CA 94024

**Re: Request for Facilities**

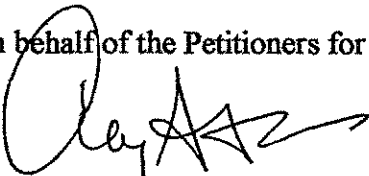
To Marge Gratiot and the Los Altos School District Board of Trustees:

As part of the charter petition for Bullis Charter School we, the Petitioners for the Bullis Charter School, are specifically requesting the use of the site, buildings and related facilities currently used for Bullis-Purissima Elementary School at 25890 Fremont Road in Los Altos Hills, California. As such, we would respectfully and urgently request a hearing before the "7-11 Citizen Advisory Committee" appointed by the District Board of Trustees to advise the Board on the use of that site. Please consider this formal notification of our desire and intention to utilize this site for the Bullis Charter School.

State law specifically calls for school districts to provide available District space for charter schools serving District students. As we currently have a charter petition pending before the Board, we believe it would be against both the spirit and the letter of the law to rent out such unutilized space in order to avoid the District's future obligation to the Bullis Charter School unless and until the charter is both denied and all legally available appeals have been exhausted.

Please advise us as to the date in which we may present to the Committee. Of course, please do not hesitate to call me with any questions regarding this matter.

On behalf of the Petitioners for the Bullis Charter School,



Craig A. T. Jones, Lead Petitioner, and  
Chairman of the Board of the Bullis Charter School

**SUPERINTENDENT'S MEMORANDUM  
REGARDING RECOMMENDATION**

# LOS ALTOS SCHOOL DISTRICT

## MEMORANDUM

TO: Board of Trustees  
FROM: Marge Gratiot, Superintendent  
DATE: May 5, 2003  
RE: May 5, 2003

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Our staff recommendation, which will be presented orally this evening, is that you deny the charter school petition.

Adopting the attached draft resolution, should you choose to do so, will have the effect of denying the petition and providing written findings, as required by law.

Attachment: (Draft) Resolution of the Board of Trustees of the Los Altos School District Denying the Bullis Charter School Petition and Making Findings in Connection Therewith

# **RESOLUTION DENYING CHARTER**



**RESOLUTION 02/03-17**

**RESOLUTION OF THE BOARD OF TRUSTEES  
OF THE LOS ALTOS SCHOOL DISTRICT  
DENYING THE BULLIS CHARTER SCHOOL PETITION AND  
MAKING FINDINGS IN CONNECTION THEREWITH**

**WHEREAS**, the California Legislature has charged local school boards with reviewing and acting on petitions for establishment of charter schools; and

**WHEREAS**, founders of the Bullis Charter School, a California non-profit corporation, delivered a Charter School Petition ("Petition") to the Los Altos School District ("District") on or about March, 12, 2003 for the establishment of the Bullis Charter School ("Charter School"); and

**WHEREAS**, the petition was received by the Board of Trustees ("Board") on March 17, 2003, and a public hearing was conducted on March 30, 2003 pursuant to Education Code section 47605, to consider the level of public support for the Charter School by teachers employed by the District, other employees of the District, and parents; and

**WHEREAS**, the Board has considered the level of public support for the Charter School and has obtained, reviewed, and analyzed the Petition and all information received with respect to the Petition, including all exhibits and supporting documentation, and has considered information related to the operation and potential effects of the proposed Charter School. In reviewing the Petition, the Board has been guided by the intent of the California Legislature that charter schools are and should become an integral part of the California educational system and that establishment of charter schools should be encouraged.

**NOW, THEREFORE**, the Board does hereby deny the Petition, and makes the following factual findings in support thereof:

1. **Petitioners are demonstrably unlikely to successfully implement the program described in the Petition [Education Code section 47605(b)(2)].**
  - A. **Lack of Program Focus.** The Petitioners are demonstrably unlikely to successfully implement their educational program because the principal motivation for the Petition appears to be keeping a neighborhood school open, with its existing attendance boundaries intact, rather than promoting and implementing a thoughtful, well-grounded alternative educational program that is open to all students and meets the intent of the Legislature in providing for the establishment of charter schools, including, without limitation, the improvement

of pupil learning, the expansion of learning opportunities and choice for pupils, teachers and parents, and the use of different and innovative teaching methods. At every level, as set forth more specifically in these findings, Petitioners have elevated their desire to remain at a closed school site over educational substance and expanded choice and opportunity.

*Lack of familiarity*

**B. Lack of Sufficient Planning Time.** The Petitioners' plan to commence the Charter School program in Fall 2003 is unrealistic, and severely underestimates the complexities of developing and implementing a quality education plan and opening and operating a public school. The Petitioners have not yet, to the knowledge of the Board:

- demonstrated any depth of knowledge of the curriculum, instruction, or assessment applicable to the instructional program they plan to implement, nor have their consultants;
- provided for sufficient professional development, either in terms of timing or depth, to ensure that teaching staff will be adequately prepared to teach the instructional program prior to the start of school;
- developed a facilities plan other than one that presumes that the Bullis-Purissima Elementary School site will be made available for Charter School use.
- retained a school principal;
- recruited any teaching staff.

**C. Lack of Familiarity with Legal Requirements.** The Petitioners are unfamiliar with the requirements of law that would apply to the Charter School, as demonstrated by the following:

1. The entire Petition is premised upon the ability of Petitioners to obtain use of a school site that recently was closed by the District Board of Trustees for economic reasons and is currently in the school property disposal process. The petition states in numerous places its assumption that the Charter School will be legally entitled to open a charter school at the closed school site, even though there is no such requirement in the law.
2. Admissions preferences to be used in the event that a lottery becomes necessary are in conflict with the requirements of the Education Code. Under the Petitioner's admissions priority system, students from outside the District could take priority over students residing within the District boundaries in terms of admissions, and admissions preference could be determined based on the place of residence of pupils within the District,

which is prohibited by Education Code section 47605 (d). Admissions preferences give priority to students of "founding families" of the Charter School, students of employees, students residing in the Town of Los Altos Hills and the former Bullis-Purissima attendance boundaries, and siblings of Charter School students, all of which include a potentially significant number of students who reside within a neighboring unified school district. Furthermore, the Charter School has been unable to provide a list of its "founding families" so that the Board can evaluate the full impact of the admissions priority system, including whether or not the priority system might alter the racial and ethnic balance of the Charter School such that it does not reflect that balance within the District generally.

In addition, the Board questions the legality of the premise that students may be given enrollment preference based on whether or not their parents have attained a certain level of parental involvement or volunteer hours, which the Board understands is a necessary component of being a "founding family." A child wishing to take advantage of the opportunities promised in the proposed Charter cannot be denied admission merely because the parent is unable or unwilling to meet the Charter School's parent participation requirements. The right to education, as guaranteed by the California Constitution, is the child's right, not the parent's right.

3. The Charter fails to provide for the membership of a representative of the District governing board on the board of directors of the nonprofit corporation that is anticipated to run the Charter School, as required by Education Code section 47604(b).

D. **Unrealistic Financial/Operational Plan.** The Petitioners have presented an unrealistic financial and operational plan for the Charter School, demonstrated by the following:

1. **Financial Administration/Budget.** The Charter School budget is unworkable and unrealistic for its planned operation, for the following reasons:

*Review of funding model*

Attaining a balanced budget is dependent on local fundraising, grants and parent donations, and there is no guarantee that such funding will materialize, especially for the 2003-04 school year. No evidence has been presented concerning specific funding commitments from any local source. Requests made by the Board for specific information on fundraising level achieved by the Charter School foundation were denied, making it impossible for

the Board to evaluate this aspect of the budget.

- The budget assumes receipt of state revenues for Instructional Time and Staff Development 'Buy Back' Reform, which would require each certificated staff member to work an additional three days beyond the instructional year. The budget has not included payment of teacher salaries for more than 185 total instructional days.
- The budget relies on Petitioners obtaining a charter school planning grant from the California Department of Education which may be feasible but to the District's knowledge, these funds are paid over a three-year period, not in a single lump sum in the first year of charter school operation as shown on the balance sheets of the Charter School.
- The Petition states that the Charter School will be "fully staffed" in the areas of art, mathematics, music, physical education and science, but the budget assumes a 0.2 FTE staffing ratio for these programs. It is not clear what the Petitioner's mean by "fully staffed" if such courses are offered only one day per week.
- The amount of money budgeted for instructional supplies falls far short of what is needed to implement any educational program using state-adopted instructional materials, much less the more complex existing District curriculum which supplements state-adopted basic materials with District-developed and other supplementary materials to ensure full coverage of state standards. The Petitioners' estimated expenditure of \$8,025 for textbooks is inadequate and demonstrates a lack of understanding of learner and/or classroom needs. The budgeted amount would only cover 19% of the costs of State-approved reading/language arts and mathematics textbooks. Purchase of textbooks for the estimated Charter School enrollment would cost approximately \$40,125 in reading/language arts and mathematics alone. The budgeted amount does not take into consideration additional materials costs needed to provide differentiated instruction for children with special needs, nor is the budgeted amount sufficient to provide for supplementary instructional materials, consumable materials, math manipulatives, hands-on items, musical instruments, physical education equipment, classroom libraries, school library collections, or teacher and student resource materials.

- The budget does not clearly indicate how student attendance accounting will be contracted and/or paid for. The proposal to use the services of the California Administrative Services Authority (“CASA”) does not reference student attendance accounting. The only reference included in the budget is a \$1,550 line item for a software license, which is too low to support the acquisition of a student attendance accounting system that is capable of meeting state requirements for attendance accounting.
- Budget assumptions for professional development are too low, given the fact that the Charter School has not recruited any District teachers to teach in the program, and all certificated staff would need both initial training and ongoing mentoring to successfully deliver whatever curriculum is finally developed and approved by the Charter School Board.
- Budget assumptions for equipment and facility rentals are too low, particularly for the first year of operation. It does not appear that the budget provides equipment (e.g., overhead projectors and screens, maps, globes, etc.) or office equipment (such as computers, calculators, staplers, and the like) There are no clear line items for phone system, postage machine, and other larger cost office equipment. Costs for computers and data network equipment and copies are underestimated.
- The budget describes the positions of Chief Personnel Officer and Chief Business Officer of the Charter School, but these positions are not described or referenced at all in the Charter documents. If these functions are meant to be served by an outside consultant, this has not been specified in the Charter.
- The projections for categorical funding in future years do not take into account an anticipated twelve percent (12%) reduction by the State of California.
- The budget assumes a return on its invested funds of approximately six percent (6%), which is not consistent with current financial conditions and far exceeds the amount of interest earned on school district funds invested in the County Treasury.
- The budget includes an anticipated increase in the cost of health

*Attendance  
proposed  
outside of school dist.*

benefits of approximately five percent (5%). A realistic assumption of the annual increase in health benefit costs would be fifteen to twenty-five percent (15-25%) in today's economic climate.

2. Facilities. The Petitioners have attempted to use the establishment of a charter school as a method for keeping a school site open with its former attendance boundaries intact, although the Charter School does not meet the legal requirements to be considered a conversion charter school. Petitioners have been advised that the site is being evaluated for disposal by the District's property advisory committee and is not available for use in the 2003-04 school year, and may never be available for this purpose given space available at another reasonably equivalent school facility. Yet Petitioners have failed to provide any significant or detailed information regarding the location of, or realistic prospects for, locating a facility other than the Bullis Purissima Elementary School site either within or outside the parameters of Proposition 39, have not budgeted sufficient funds to rent or acquire any other facility, and have offered no information demonstrating knowledge of facilities safety, security, and emergency preparedness.

In addition, the strong emphasis on the Charter School's location at the Bullis-Purissima Elementary School creates significant doubt that the Charter School will have local community and parental support it needs to become and remain a viable operation if it must locate an alternative facility for the Charter School. Because the basis for the Charter School appears to be the use of this particular facility, as demonstrated by its use of the name of the former school site, its instructional focus, its admissions policies and intended student body, the Board finds that Petitioner's operational plan is unrealistic and is unlikely to be successful.

- 3 Lack of Necessary Expertise. Petitioners have proposed to hire consultants to assist with the development of a curriculum and instructional program and methods of assessment, and to manage its financial and business operations, yet the lack of educational program content, even after Petitioners were invited to supplement its Charter with additional information, as well as unrealistic budget assumptions, call into question whether either Petitioners can effectively operate and sustain a public school program,

2. **The petition does not contain an affirmation of each of the conditions described in subdivision (d) [Education Code section 47605(b)(4)]; Neither the charter nor any of**

**the supporting documents shall include any evidence that the charter will fail to comply with the conditions described in Education Code section 47605(d) [Cal. Code Regs. Tit. 5, section 11967.5.1(e)]**

Education Code section 47605(b)(4) states that the petition must contain an affirmation of each of the conditions described in subdivision (d). Subdivision (d) states that admission to a charter school shall not be determined according to the place of residence of the pupil. The Petition fails to affirm that admission to the Charter School will not be so determined. In fact, the Petitioners have established an admission system that (a) would give enrollment priority to students residing outside the District boundaries over those residing within District boundaries (i.e., children of founding families, children of Charter School employees, children residing in the Town of Los Altos Hills), and (b) may be determined according to the place of residence of the pupil (students residing within the attendance area of the former Bullis-Purissima Elementary School). District residents take fifth priority in the Charter School enrollment scheme.

**3. The Petition does not contain reasonably comprehensive descriptions of all of the required elements of a charter petition [Education Code section 47605(b)(5)].**

The Petition does not contain reasonably comprehensive descriptions of the following legally required elements of a charter petition:

**A. A description of the educational program of the school.**

The educational program proposed by the Charter School is wholly inadequate and lacks educational depth and substance. Petitioners were given an opportunity during the review period to provide more specific information regarding their educational program, and despite claims of having retained at least one curriculum expert to assist in the development of a specific program, Petitioners failed to submit the kind of information that would instill any confidence in the Board that it has a clear educational plan or the expertise to develop and implement one.

1. The Mission Statement, Goals, and Core Value statements in the Charter are merely a recitation of the District's existing educational plan for the Bullis-Purissima Elementary School. Nothing new, innovative, or specific to the proposed Charter was developed by the Petitioners in these areas. The Petitioners' idea of how learning best occurs lists teaching methodologies with no elaboration of why those teaching methodologies support the proposed educational program.
2. The Charter asserts that the Charter School "shall adopt and implement the comprehensive, rigorous core curriculum similar to the one used by the

former traditional school site” (Charter, p. 4), but nothing in the Charter indicates that the Petitioners have the required level of knowledge of the components and methodology of the District’s curriculum to implement it and to ensure that non-District teachers are prepared to teach it. Copies of District-produced pamphlets that outline the District’s course of study for each grade level were attached to the proposed Charter, presumably as a point of reference for the educational program; however, these are promotional materials that were not designed to provide a comprehensive overview of a total curriculum, are not substantive, and are a listing of topics with little elaboration. The charter documents show no understanding that the school district’s curriculum is an integrated approach, using a wide variety of instructional materials carefully aligned with state standards, and delivered by teachers who are either highly experienced and trained or part of a team led by a highly experienced and trained master teacher.

3. Because the Petitioners intend to use the District’s pre-existing curriculum with little substantive modification, the Charter fails to describe how the Charter School will improve pupil learning beyond the District program already offered, increase learning opportunities for its pupils, or provide parents and pupils with expanded educational opportunities. Most of the curriculum enhancements cited by Petitioners are either (a) already provided in District schools (such as environmental education); or (b) of dubious value given the lack of any detailed description of the components of an educational plan (smaller class size; smaller school size). Petitioners’ focus on retaining a neighborhood school where students “will learn in close proximity to their parents and neighbors” may be legally unattainable, given that a start-up charter school is required to allow any student to attend the school who wants to, not just those residing in geographic proximity to the former public school.
4. The instructional program does not reference the four core curriculum areas adopted by the State Board of Education or indicate how the school’s pupils will master their associated content standards.
5. The Charter fails to address how the Charter School will identify and respond to the needs of pupils who are not achieving at or above expected levels. The Charter references English language learners, but does not contain enough specific information for the Board to evaluate whether the Petitioners possess the requisite expertise to develop a program that will be responsive to the needs of such students. In addition, the assumptions inherent in the budget suggest that the Petitioners do not believe they will



have any students of limited English proficiency, which may not be realistic given the demographic characteristics of the District and county.

6. The Petitioners demonstrate that they do not understand their responsibilities under the law for special education students. They acknowledge that suspension and expulsion procedures may be different for special education students but do not identify how or make adjustments to their proposed suspension and expulsion policy for special education students. Although they specify that direct special education services will be provided by the District, they do not describe how the classroom program of the Charter School will be able to adapt curriculum or instructional materials to meet the needs of children with Individualized Education Programs (IEPs).

**B. The measurable pupil outcomes identified for use by the charter school.**

The Petitioners refer to API and STAR assessment measurements, but they do not specify the skills, knowledge, and attitudes that reflect the State standards or the school's educational objectives; consequently, there is no indication of how instructional benchmarks could be assessed by objective means that are frequent and sufficiently detailed enough to determine whether pupils are making satisfactory progress. There is also no detail that would indicate the effectiveness of the program or instructional modifications for individual students and for groups of students.

**C. The method by which pupil progress in meeting those pupil outcomes is to be measured.**

The measurable pupil outcomes lack multiple measures of student performance, fail to identify measurement objectives or instruments, and do not offer a plan for collecting, analyzing, and reporting data on pupil achievement to school staff, parents or guardians; nor is there a method for utilizing the data continuously to monitor and improve the charter school's educational program.

**D. The governance structure of the school, including, but not limited to, the process to be followed by the school to ensure parental involvement.**

Although the Charter indicates that the Charter School will be run by a California non-profit corporation, the governance plan does not provide for the opportunity for a representative of the District governing board to serve on the board of directors of the corporation, as required by law.

**E. The qualifications to be met by individuals to be employed by the school.**

1. The Petition fails to identify those positions that the Charter School regards as key in each category and to specify the additional qualifications expected of individuals assigned to those positions.
2. The Petition fails to identify and describe the qualifications associated with employing any classified instructional staff, although the budget suggests that at least one such aide is anticipated to be employed.

**F. The procedures that the school will follow to ensure the health and safety of pupils and staff.**

1. The Charter does not present a health and safety plan that addresses even minimal requirements spelled out in State regulations. Specifically, the Charter fails to reference a plan for the screening of pupils' vision and hearing and the screening of pupils for scoliosis.
2. The Charter references use of the District's health and safety plan, but there is no indication that Petitioners know what is contained in the District's health and safety plan, have the resources and expertise necessary to implement it, and know whether its facilities safety components would be applicable to non-Field Act compliant facilities. The Charter fails to address or even reference items such as facilities safety, environmental safety, disaster preparedness, and health services.

**G. Admission requirements, if applicable.**

The Charter and its supporting documents offer conflicting information about admission requirements and appears to establish enrollment preferences that are not consistent with applicable legal requirements. Enrollment preferences in the event that there are more applications than available seats do not conform to the requirement that District students (and existing students of the Charter School in subsequent years) be given first priority in a lottery. District students are fifth in priority under the admission system proposed by the Charter School.

**H. The manner in which annual, independent financial audits shall be conducted, which shall employ generally accepted accounting principles, and the manner in which audit exceptions and deficiencies shall be resolved to the satisfaction of the chartering authority.**

1. The Charter fails to specify who is responsible for contracting and

overseeing the independent audit.

2. The Charter fails to indicate that the auditor to be selected to conduct the financial audit will have experience in education finance, and fails to specify that it intends to conduct its financial affairs in accordance with generally accepted accounting principals that are applicable to public schools, rather than standards that may be applicable to non-profit corporations in other contexts.
3. The Charter fails to specify the time line in which audit exceptions will typically be addressed.

**I. The procedures by which pupils can be suspended or expelled.**

The Charter has not provided sufficient information regarding the process it will use to find appropriate alternative educational programs after a student has been expelled. The Charter assumes that District programs will be available to students expelled from the Charter School.

For all the foregoing reasons, the Board hereby denies the Petition for the establishment of the Bullis Charter School.

**APPROVED, PASSED AND ADOPTED** by the Board of Trustees of the District on the 5th day of May 2003, by the following vote:

AYES:

NOES:

ABSTENTIONS:

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President of the Board of Trustees  
Los Altos School District



LAW OFFICES OF SPECTOR, MIDDLETON, YOUNG & MINNEY, LLP

FACSIMILE TRANSMISSION COVER SHEET

DATE: Wednesday, July 02, 2003  
TO: Porter Sexton  
Santa Clara County Office of Education  
FAX NO.: (408) 453-6525  
FROM: Lisa A. Corr  
SUBJECT: Signed Resolution 02/03-17  
Los Altos Denial of Bullis Charter

Number of Pages (including this cover sheet): 13

**COMMENTS: For Bullis Charter School Appeal.**

**CONFIDENTIALITY NOTE:** The information contained in this facsimile is confidential and may also contain privileged attorney-client information or work product and is intended only for the use of the individual or entity to who it is addressed. If you are not the intended recipient, you are hereby notified that any use, dissemination, distribution, or copying of this communication is strictly prohibited. If you have received this facsimile in error, please notify us immediately by telephone, and return the original to us.

**RESOLUTION 02/03-17****RESOLUTION OF THE BOARD OF TRUSTEES  
OF THE LOS ALTOS SCHOOL DISTRICT  
DENYING THE BULLIS CHARTER SCHOOL PETITION AND  
MAKING FINDINGS IN CONNECTION THEREWITH**

**WHEREAS**, the California Legislature has charged local school boards with reviewing and acting on petitions for establishment of charter schools; and

**WHEREAS**, founders of the Bullis Charter School, a California non-profit corporation, delivered a Charter School Petition ("Petition") to the Los Altos School District ("District") on or about March, 12, 2003 for the establishment of the Bullis Charter School ("Charter School"); and

**WHEREAS**, the petition was received by the Board of Trustees ("Board") on March 17, 2003, and a public hearing was conducted on March 30, 2003 pursuant to Education Code section 47605, to consider the level of public support for the Charter School by teachers employed by the District, other employees of the District, and parents; and

**WHEREAS**, the Board has considered the level of public support for the Charter School and has obtained, reviewed, and analyzed the Petition and all information received with respect to the Petition, including all exhibits and supporting documentation, and has considered information related to the operation and potential effects of the proposed Charter School. In reviewing the Petition, the Board has been guided by the intent of the California Legislature that charter schools are and should become an integral part of the California educational system and that establishment of charter schools should be encouraged.

**NOW, THEREFORE**, the Board does hereby deny the Petition, and makes the following factual findings in support thereof:

1. **Petitioners are demonstrably unlikely to successfully implement the program described in the Petition [Education Code section 47605(b)(2)].**
  - A. **Lack of Program Focus.** The Petitioners are demonstrably unlikely to successfully implement their educational program because the principal motivation for the Petition appears to be keeping a neighborhood school open, with its existing attendance boundaries intact, rather than promoting and

implementing a thoughtful, well-grounded alternative educational program that is open to all students and meets the intent of the Legislature in providing for the establishment of charter schools, including, without limitation, the improvement of pupil learning, the expansion of learning opportunities and choice for pupils, teachers and parents, and the use of different and innovative teaching methods. At every level, as set forth more specifically in these findings, Petitioners have elevated their desire to remain at a closed school site over educational substance and expanded choice and opportunity.

- B. Lack of Sufficient Planning Time.** The Petitioners' plan to commence the Charter School program in Fall 2003 is unrealistic, and severely underestimates the complexities of developing and implementing a quality education plan and opening and operating a public school. The Petitioners have not yet, to the knowledge of the Board:

- demonstrated any depth of knowledge of the curriculum, instruction, or assessment applicable to the instructional program they plan to implement, nor have their consultants;
- provided for sufficient professional development, either in terms of timing or depth, to ensure that teaching staff will be adequately prepared to teach the instructional program prior to the start of school;
- developed a facilities plan other than one that presumes that the Bullis-Purissima Elementary School site will be made available for Charter School use.
- retained a school principal;
- recruited any teaching staff.

- C. Lack of Familiarity with Legal Requirements.** The Petitioners are unfamiliar with the requirements of law that would apply to the Charter School, as demonstrated by the following:

1. The entire Petition is premised upon the ability of Petitioners to obtain use of a school site that recently was closed by the District Board of Trustees for economic reasons and is currently in the school property disposal process. The petition states in numerous places its assumption that the Charter School will be legally entitled to open a charter school at the closed school site, even though there is no such requirement in the law.
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necessary are in conflict with the requirements of the Education Code. Under the Petitioner's admissions priority system, students from outside the District could take priority over students residing within the District boundaries in terms of admissions, and admissions preference could be determined based on the place of residence of pupils within the District, which is prohibited by Education Code section 47605 (d). Admissions preferences give priority to students of "founding families" of the Charter School, students of employees, students residing in the Town of Los Altos Hills and the former Bullis-Purissima attendance boundaries, and siblings of Charter School students, all of which include a potentially significant number of students who reside within a neighboring unified school district. Furthermore, the Charter School has been unable to provide a list of its "founding families" so that the Board can evaluate the full impact of the admissions priority system, including whether or not the priority system might alter the racial and ethnic balance of the Charter School such that it does not reflect that balance within the District generally.

In addition, the Board questions the legality of the premise that students may be given enrollment preference based on whether or not their parents have attained a certain level of parental involvement or volunteer hours, which the Board understands is a necessary component of being a "founding family." A child wishing to take advantage of the opportunities promised in the proposed Charter cannot be denied admission merely because the parent is unable or unwilling to meet the Charter School's parent participation requirements. The right to education, as guaranteed by the California Constitution, is the child's right, not the parent's right.

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D. **Unrealistic Financial/Operational Plan** The Petitioners have presented an unrealistic financial and operational plan for the Charter School, demonstrated by the following:

1. **Financial Administration/Budget**. The Charter School budget is unworkable and unrealistic for its planned operation, for the following reasons:



Attaining a balanced budget is dependent on local fundraising, grants and parent donations, and there is no guarantee that such funding will materialize, especially for the 2003-04 school year. No evidence has been presented concerning specific funding commitments from any local source. Requests made by the Board for specific information on fundraising level achieved by the Charter School foundation were denied, making it impossible for the Board to evaluate this aspect of the budget.

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The budget relies on Petitioners obtaining a charter school planning grant from the California Department of Education which may be feasible but to the District's knowledge, these funds are paid over a three-year period, not in a single lump sum in the first year of charter school operation as shown on the balance sheets of the Charter School.

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Charter School enrollment would cost approximately \$40,125 in reading/language arts and mathematics alone. The budgeted amount does not take into consideration additional materials costs needed to provide differentiated instruction for children with special needs, nor is the budgeted amount sufficient to provide for supplementary instructional materials, consumable materials, math manipulatives, hands-on items, musical instruments, physical education equipment, classroom libraries, school library collections, or teacher and student resource materials.

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The budget describes the positions of Chief Personnel Officer and Chief Business Officer of the Charter School, but these positions are not described or referenced at all in the Charter documents. If these functions are meant to be served by an outside consultant, this has not been specified in the Charter.

- The projections for categorical funding in future years do not take into account an anticipated twelve percent (12%) reduction by the State of California.
- The budget assumes a return on its invested funds of approximately six percent (6%), which is not consistent with current financial conditions and far exceeds the amount of interest earned on school district funds invested in the County Treasury.
- The budget includes an anticipated increase in the cost of health benefits of approximately five percent (5%). A realistic assumption of the annual increase in health benefit costs would be fifteen to twenty-five percent (15-25%) in today's economic climate.

2. Facilities. The Petitioners have attempted to use the establishment of a charter school as a method for keeping a school site open with its former attendance boundaries intact, although the Charter School does not meet the legal requirements to be considered a conversion charter school. Petitioners have been advised that the site is being evaluated for disposal by the District's property advisory committee and is not available for use in the 2003-04 school year, and may never be available for this purpose given space available at another reasonably equivalent school facility. Yet Petitioners have failed to provide any significant or detailed information regarding the location of, or realistic prospects for, locating a facility other than the Bullis Purissima Elementary School site either within or outside the parameters of Proposition 39, have not budgeted sufficient funds to rent or acquire any other facility, and have offered no information demonstrating knowledge of facilities safety, security, and emergency preparedness.

In addition, the strong emphasis on the Charter School's location at the Bullis-Purissima Elementary School creates significant doubt that the Charter School will have local community and parental support it needs to become and remain a viable operation if it must locate an alternative facility for the Charter School. Because the basis for the Charter School appears to be the use of this particular facility, as demonstrated by its use of the name of the former school site, its instructional focus, its admissions policies and intended student body, the Board finds that Petitioner's

operational plan is unrealistic and is unlikely to be successful.

- 3 Lack of Necessary Expertise. Petitioners have proposed to hire consultants to assist with the development of a curriculum and instructional program and methods of assessment, and to manage its financial and business operations, yet the lack of educational program content, even after Petitioners were invited to supplement its Charter with additional information, as well as unrealistic budget assumptions, call into question whether either Petitioners can effectively operate and sustain a public school program,

2. **The petition does not contain an affirmation of each of the conditions described in subdivision (d) [Education Code section 47605(b)(4)]; Neither the charter nor any of the supporting documents shall include any evidence that the charter will fail to comply with the conditions described in Education Code section 47605(d) [Cal. Code Regs. Tit. 5, section 11967.5.1(e)]**

Education Code section 47605(b)(4) states that the petition must contain an affirmation of each of the conditions described in subdivision (d). Subdivision (d) states that admission to a charter school shall not be determined according to the place of residence of the pupil. The Petition fails to affirm that admission to the Charter School will not be so determined. In fact, the Petitioners have established an admission system that (a) would give enrollment priority to students residing outside the District boundaries over those residing within District boundaries (i.e., children of founding families, children of Charter School employees, children residing in the Town of Los Altos Hills), and (b) may be determined according to the place of residence of the pupil (students residing within the attendance area of the former Bullis-Purissima Elementary School). District residents take fifth priority in the Charter School enrollment scheme.

3. **The Petition does not contain reasonably comprehensive descriptions of all of the required elements of a charter petition [Education Code section 47605(b)(5)].**

The Petition does not contain reasonably comprehensive descriptions of the following legally required elements of a charter petition:

- A. **A description of the educational program of the school.**

The educational program proposed by the Charter School is wholly inadequate and lacks educational depth and substance. Petitioners were given an opportunity during the review period to provide more specific information regarding their

educational program, and despite claims of having retained at least one curriculum expert to assist in the development of a specific program, Petitioners failed to submit the kind of information that would instill any confidence in the Board that it has a clear educational plan or the expertise to develop and implement one.

1. The Mission Statement, Goals, and Core Value statements in the Charter are merely a recitation of the District's existing educational plan for the Bullis-Purissima Elementary School. Nothing new, innovative, or specific to the proposed Charter was developed by the Petitioners in these areas. The Petitioners' idea of how learning best occurs lists teaching methodologies with no elaboration of why those teaching methodologies support the proposed educational program.
2. The Charter asserts that the Charter School "shall adopt and implement the comprehensive, rigorous core curriculum similar to the one used by the former traditional school site" (Charter, p. 4), but nothing in the Charter indicates that the Petitioners have the required level of knowledge of the components and methodology of the District's curriculum to implement it and to ensure that non-District teachers are prepared to teach it. Copies of District-produced pamphlets that outline the District's course of study for each grade level were attached to the proposed Charter, presumably as a point of reference for the educational program; however, these are promotional materials that were not designed to provide a comprehensive overview of a total curriculum, are not substantive, and are a listing of topics with little elaboration. The charter documents show no understanding that the school district's curriculum is an integrated approach, using a wide variety of instructional materials carefully aligned with state standards, and delivered by teachers who are either highly experienced and trained or part of a team led by a highly experienced and trained master teacher.
3. Because the Petitioners intend to use the District's pre-existing curriculum with little substantive modification, the Charter fails to describe how the Charter School will improve pupil learning beyond the District program already offered, increase learning opportunities for its pupils, or provide parents and pupils with expanded educational opportunities. Most of the curriculum enhancements cited by Petitioners are either (a) already provided in District schools (such as environmental education); or (b) of dubious value given the lack of any detailed description of the components of an educational plan (smaller class size; smaller school size). Petitioners'

focus on retaining a neighborhood school where students "will learn in close proximity to their parents and neighbors" may be legally unattainable, given that a start-up charter school is required to allow any student to attend the school who wants to, not just those residing in geographic proximity to the former public school.

4. The instructional program does not reference the four core curriculum areas adopted by the State Board of Education or indicate how the school's pupils will master their associated content standards.
5. The Charter fails to address how the Charter School will identify and respond to the needs of pupils who are not achieving at or above expected levels. The Charter references English language learners, but does not contain enough specific information for the Board to evaluate whether the Petitioners possess the requisite expertise to develop a program that will be responsive to the needs of such students. In addition, the assumptions inherent in the budget suggest that the Petitioners do not believe they will have any students of limited English proficiency, which may not be realistic given the demographic characteristics of the District and county.
6. The Petitioners demonstrate that they do not understand their responsibilities under the law for special education students. They acknowledge that suspension and expulsion procedures may be different for special education students but do not identify how or make adjustments to their proposed suspension and expulsion policy for special education students. Although they specify that direct special education services will be provided by the District, they do not describe how the classroom program of the Charter School will be able to adapt curriculum or instructional materials to meet the needs of children with Individualized Education Programs (IEPs).

**B. The measurable pupil outcomes identified for use by the charter school.**

The Petitioners refer to API and STAR assessment measurements, but they do not specify the skills, knowledge, and attitudes that reflect the State standards or the school's educational objectives; consequently, there is no indication of how instructional benchmarks could be assessed by objective means that are frequent and sufficiently detailed enough to determine whether pupils are making satisfactory progress. There is also no detail that would indicate the effectiveness of the program or instructional modifications for individual students and for

groups of students.

- C. The method by which pupil progress in meeting those pupil outcomes is to be measured.**

The measurable pupil outcomes lack multiple measures of student performance, fail to identify measurement objectives or instruments, and do not offer a plan for collecting, analyzing, and reporting data on pupil achievement to school staff, parents or guardians; nor is there a method for utilizing the data continuously to monitor and improve the charter school's educational program.

- D. The governance structure of the school, including, but not limited to, the process to be followed by the school to ensure parental involvement.**

Although the Charter indicates that the Charter School will be run by a California non-profit corporation, the governance plan does not provide for the opportunity for a representative of the District governing board to serve on the board of directors of the corporation, as required by law.

- E. The qualifications to be met by individuals to be employed by the school.**

1. The Petition fails to identify those positions that the Charter School regards as key in each category and to specify the additional qualifications expected of individuals assigned to those positions.
2. The Petition fails to identify and describe the qualifications associated with employing any classified instructional staff, although the budget suggests that at least one such aide is anticipated to be employed.

- F. The procedures that the school will follow to ensure the health and safety of pupils and staff.**

1. The Charter does not present a health and safety plan that addresses even minimal requirements spelled out in State regulations. Specifically, the Charter fails to reference a plan for the screening of pupils' vision and hearing and the screening of pupils for scoliosis.
2. The Charter references use of the District's health and safety plan, but there is no indication that Petitioners know what is contained in the District's health and safety plan, have the resources and expertise

necessary to implement it, and know whether its facilities safety components would be applicable to non-Field Act compliant facilities. The Charter fails to address or even reference items such as facilities safety, environmental safety, disaster preparedness, and health services.

**G. Admission requirements, if applicable.**

The Charter and its supporting documents offer conflicting information about admission requirements and appears to establish enrollment preferences that are not consistent with applicable legal requirements. Enrollment preferences in the event that there are more applications than available seats do not conform to the requirement that District students (and existing students of the Charter School in subsequent years) be given first priority in a lottery. District students are fifth in priority under the admission system proposed by the Charter School.

**H. The manner in which annual, independent financial audits shall be conducted, which shall employ generally accepted accounting principles, and the manner in which audit exceptions and deficiencies shall be resolved to the satisfaction of the chartering authority.**

1. The Charter fails to specify who is responsible for contracting and overseeing the independent audit.
2. The Charter fails to indicate that the auditor to be selected to conduct the financial audit will have experience in education finance, and fails to specify that it intends to conduct its financial affairs in accordance with generally accepted accounting principals that are applicable to public schools, rather than standards that may be applicable to non-profit corporations in other contexts.
3. The Charter fails to specify the time line in which audit exceptions will typically be addressed.

**I. The procedures by which pupils can be suspended or expelled.**

The Charter has not provided sufficient information regarding the process it will use to find appropriate alternative educational programs after a student has been expelled. The Charter assumes that District programs will be available to students expelled from the Charter School.




For all the foregoing reasons, the Board hereby denies the Petition for the establishment of the Bullis Charter School.

**APPROVED, PASSED AND ADOPTED** by the Board of Trustees of the District on the 5th day of May 2003, by the following vote:

AYES: 5

NOES: 0

ABSTENTIONS: 0

  
\_\_\_\_\_  
President of the Board of Trustees  
Los Altos School District

**CERTIFICATION OF COMPLIANCE  
WITH APPLICABLE LAW**

**CERTIFICATION OF COMPLIANCE WITH APPLICABLE LAW**  
Per Title 5 California Code of Regulations § 11967(b)(3)

**Overview**

A charter petition that has been previously denied by the governing board of a school district may be submitted to the county board of education or the State Board of Education. (See Education Code § 47605(j)(1)). As per Education Code § 47605(j)(4), the State Board of Education has adopted regulations implementing the provisions of § 47605(j)(1). (See Title 5 California Code of Regulations § 11967).

Title 5 California Code of Regulations § 11967 requires that a charter school petition that has been previously denied by the governing board of a school district must be received by the county office of Education or State Board of Education not later than 180 calendar days after the denial. See, 5 CCR §11967. In addition, subdivision (b)(3) of §11967 requires the charter petitioner to provide a "signed certification of compliance with applicable law" when submitting the denied petition to the county office of education or State Board of Education.

The following certification is submitted in compliance with 5 CCR §11967(b)(3).

**Certification**

By signing below, I certify as follows:

1. That I am the lead petitioner, and that I am competent and qualified to certify to the facts herein;
2. That as lead petitioner I have personal knowledge of the facts forming the basis of this certification;
3. That I make this certification for purposes of §11967(b)(3) only; and
4. That charter petitioners and the charter itself are in compliance with applicable law.

Date: 06-16-03

Craig Jones  
Craig Jones

CRAIG A.T. JONES

[Type or print name of person  
signing]

**REVISED BULLIS CHARTER SCHOOL  
CHARTER PETITION**

# BULLIS CHARTER SCHOOL

## AFFIRMATIONS



The Bullis Charter School shall be non-sectarian in its programs, admissions policies, employment practices, and all other operations, shall not charge tuition, and shall not discriminate against any pupil on the basis of race, ethnicity, national origin, gender, or disability.

The Bullis Charter School shall admit all pupils within the State of California who wish to attend the School subject to capacity.

All meetings of the Board of the Bullis Charter School shall be held in compliance with the Brown Act.

The Bullis Charter School shall comply with all applicable state and federal laws in serving students with disabilities including, but not limited to, Section 504 of the Rehabilitation Act, the Americans with Disabilities Act and the Individuals with Disabilities in Education Act.

The Bullis Charter School shall offer at a minimum, the same number of minutes of instruction set forth in paragraph (3) of subdivision (a) of Education Code Section 46201 for the appropriate grade levels.

The Bullis Charter School shall maintain accurate and current written records that document all pupil attendance and make these records available for audit and inspection.

The Bullis Charter School shall meet all state standards and conduct the pupil assessments required pursuant to Education Code Section 60605 and any other statewide standards authorized in statute or pupil assessments applicable to pupils in non-charter public schools.

The Bullis Charter School shall on a regular basis consult with its parents and teachers regarding the School's education programs.

## I. EDUCATIONAL PROGRAM

*A description of the educational program of the School, designed, among other things, to identify those whom the School is attempting to educate, what it means to be an educated person in the 21st century, and how learning best occurs. The goals identified in that program shall include the objective of enabling pupils to become self-motivated, competent, and lifelong learners.*

*- California Education Code Section 47605 (b) (5) (A)*

### HISTORY

From 1962 to June, 2003, the Bullis Purissima School operated as a traditional school site within the Los Altos School District ("District"). On February 10, 2003, the District Board voted to close the traditional school site, and in so doing, reroute the existing pupils and teachers of the Bullis Purissima School to other District schools. Parents and interested members of the community joined together to form the Bullis Charter School ("School"), a non-profit, public benefit corporation, to create a charter school and operate the School on the campus of the former traditional school. As the former traditional school was award-winning, with a statewide ranking and similar school ranking of 10 on the 2002 Academic Performance Index ("API"), the parents and community members are seeking to build upon the former educational program of the traditional school.

### MISSION STATEMENT

Bullis Purissima School is dedicated to developing a strong collaborative community which nurtures excellence in education, fosters a love of learning and social responsibility, and builds respect for individuality and diversity.

### GOALS

The School is dedicated to developing a strong collaborative community which nurtures excellence in education, fosters a love of learning and social responsibility, and builds respect for individuality and diversity. The School shall seek to build upon the success of the former traditional school site, in creating well-rounded students who are self-motivated, competent, life-long learners who view school as an experience, a community, and a means to a great beginning in academic and professional life.

### CORE VALUES

- **COMMUNITY--Community means we care about each other like a family.** Because we value community each person will understand that as citizens we have duties and responsibilities, as well as rights. It is important that we work together to achieve goals and to make our world a better place. Bullis-Purissima is not the building, the teachers, the students, nor the parents; it is all of them put together.

- **HONESTY--Honesty means we tell the truth.** Because we value honesty we expect that each person will share ideas openly, in a climate of trust and integrity so that what is written or said can be accepted as truth. We are honest so that we can trust our relationships with others.
- **RESPECT--Respect means we honor ourselves and others.** Because we value respect we expect that each person will respond sensitively to the ideas and needs of others without dismissing or degrading them. People, our school, and our community are held in high regard. Respect for oneself, fellow students, parents, teachers, learning, and property is shown in the following ways:
- **COMPASSION--Compassion means we care about others.** Because we value both compassion and tolerance, we can be sympathetic to others' distress and make attempts to decrease it. We can "stand in the shoes" of others to understand another's viewpoint. This requires acceptance and appreciation of differences of opinion, religion, race, heritage, family viewpoints, and opinions.
- **RESPONSIBILITY--Responsibility means we take ownership for our actions.** Because we value responsibility each person will be accountable for attempting to achieve his or her full potential. This requires self-discipline, taking initiative, and being willing to take risks.

#### **WHOM THE SCHOOL IS ATTEMPTING TO EDUCATE:**

The School seeks to educate all students in the state of California who wish to attend the School subject only to capacity, with a focus on serving primarily the former students and siblings of the traditional public school, students within the former Bullis Purissima boundaries and the Los Altos Hill Community as a whole and secondarily residents of the Los Altos School District as a whole and Santa Clara County. The School seeks to preserve a neighborhood school environment, serving kindergarten through sixth grade students.

#### **WHAT IT MEANS TO BE AN "EDUCATED PERSON" IN THE 21ST CENTURY?**

An "educated person" in the 21st century is a lifelong learner who has developed competence, self-motivation, confidence, and responsibility.

#### **THE ACADEMIC ATTRIBUTES OF AN EDUCATED PERSON IN THE 21ST CENTURY INCLUDE:**

- Knowledge of and ability to demonstrate solid skills in reading, writing and speaking;
- A core knowledge which includes cultural, mathematical and scientific literacy;
- Understanding of the scientific process;
- Knowledge of history;
- Ability to think critically, creatively, analytically, and logically;
- Ability to use technology as a tool and understanding its uses;
- Ability to gather and organize information;

- Understanding of the mathematical process including application;
- Ability to critically assess data;
- Ability to appreciate, enjoy and respect the visual and performing arts;
- An understanding of the political process.

**THE PERSONAL ATTRIBUTES OF AN EDUCATED PERSON IN THE 21ST CENTURY INCLUDE:**

- Concentration, focus and perseverance;
- Ability to work cooperatively with others;
- Adaptability;
- A strong sense of connection to and responsibility for the world;
- Valuing relationships, respect for others and for authority;
- Ability to honor differences including cultural, ideological and philosophical;
- Resourcefulness, confidence and motivation;
- Enthusiasm, a sense of wonder and curiosity;
- A passion for lifelong learning;
- Clearly developed emotional intelligence;
- Ability to communicate with respect and compassion;
- A strong social conscience;
- Celebrates diversity;
- A global perspective;
- Ability to think logically, make informed evaluations and problem solve

**HOW LEARNING BEST OCCURS**

The School believes that each and every child can be academically successful and that each and every student is unique. The School believes that learning best occurs in self-contained classrooms led by teachers with the skills and knowledge of a variety of teaching techniques and methods, and specialized materials that can meet the instructional needs of every student. The school also believes in the use of meaningful assessment methods in order to prescribe the best teaching methods for each student.

Although there is no assurance that each child will master every instructional area, a major effort will be made to ensure maximum understanding and mastery. We believe that the potential for learning best occurs in environments that include meaningful content with choices for learning: adequate time, space and materials; immediate and meaningful feedback and benchmarks of progress; enriched environment and collaborative learning opportunities.

Teaching methods should include, but are not limited to:

- Inquiry method of instruction
- Small classes, and opportunities for small group learning
- Interactive, experiential learning opportunities
- Use of state-adopted materials and supplemental materials that reinforce state standards



## **INSTRUCTIONAL PROGRAM**

*Will be open  
to all students.*

The School shall adopt and implement the comprehensive, rigorous core curriculum similar to the one used by the former traditional school site. The curricular materials meet all state standards and prepare students for the annual state assessment tests. State approved textbooks shall be used at all grade levels. The core curriculum for our students focuses on the areas of mathematics, reading, language arts (both oral and written), social studies and science. All students shall also receive instruction in physical education, fine and performing arts, music, life skills, and reference/computer skills.

Teachers will receive on-going professional development in the implementation of this curriculum, and will be encouraged to supplement and adapt materials according to local conditions and needs of the student population.

The Principal and professional staff will be knowledgeable of local instructional networking opportunities, such as the Bay Area Schools for Excellence in Education (BASEE), Music for Minors, and Arts in Action. Staff will explore their applicability to our school environment and their potential to leverage school resources, further develop site expertise, and enhance student- learning outcomes. Staff will also be responsible for managing such programs and designing meaningful assessments of success.

The School shall operate a longer school day and/or a longer school year, i.e., the number of minutes of instruction in the student year meets or exceeds state standards.

## **ENGLISH LANGUAGE LEARNERS**

The School shall continue to serve and provide English Language Learners (“ELL”) at the school site through a sheltered English immersion program. Under this program the student is enrolled in a regular class and receives supplementary instruction in order to learn English. The School shall comply with all applicable federal law in regard to services and the education of English Language Learner (“ELL”) students. The School shall develop and implement, and maintain policies and procedures for the provision of services to ELL students in accordance with guidance published by the Office of Civil Rights of the U.S. Department of Education. At a minimum these policies and procedures shall ensure the following:

- Identify students who need assistance;
- Develop a program which, in the view of experts in the field, has a reasonable chance for success;
- Ensure that necessary staff, curricular materials, and facilities are in place and used properly;

- Develop appropriate evaluation standards, including program exit criteria, for measuring the progress of students; and assess the success of the program and modify it where needed.

## **SPECIAL EDUCATION STUDENTS AND STUDENTS WITH DISABILITIES**

The School shall comply with all applicable state and federal laws in serving students with disabilities including but not limited to Section 504 of the Rehabilitation Act ("Section 504"), the Americans with Disabilities Act ("ADA") and the Individuals with Disabilities in Education Act ("IDEA").

The School shall be solely responsible for its compliance with Section 504 and the ADA.

The School intends to function as a "public school of the local education agency that granted the charter" for purposes of providing special education and related services under the IDEA pursuant to Education Code Section 47641(b).

Special education services shall be provided and funded in accordance with the terms of a memorandum of understanding ("MOU") with the Distriet Santa Clara County Office of Education ("County Office").

## II. MEASURABLE PUPIL OUTCOMES

*The measurable pupil outcomes identified for use by the School. "Pupil outcomes" for purpose of this part, means the extent to which all pupils of the school demonstrate that they have attained the skills, knowledge, and attitudes specified as goals in the school's educational program.*

*- California Education Code Section 47605 (b) (5) (B)*

In order to best serve our students and community, the School will continue to examine and refine its list of student outcomes over time to reflect the school's mission and any changes to state or local standards that support such mission.

### STATE CONTENT STANDARDS

The School is dedicated to documenting at least 85% student achievement of the state content standards each year in its core subjects.

### STATE STANDARDIZED TESTING

At least 85% of students will show one grade or skill level's worth of progress each academic year, as evidenced by scores on the CAT 6 exam.

### ATTENDANCE

The School shall strive, on average, to achieve student attendance comparable to other schools in the Los Altos School District in any given year.

### ACADEMIC PERFORMANCE INDEX

The School shall strive to maintain its API score and/or appropriate growth target.

### III. METHODS TO ASSESS PUPIL PROGRESS TOWARD MEETING OUTCOMES

*The method by which pupil progress in meeting those pupil outcomes is to be measured.  
- California Education Code Section 47605 (b) (5) (C)*

Pupil progress toward meeting the Student Outcomes shall be measured by state mandated annual standardized assessments. Standardized assessments allow us to compare our students' performance with the rest of the state. In the absence of a State Mandated test, the School will administer another nationally, standardized test. In addition, the school will provide internal learning performance accountability documentation.

This internal documentation may include, but is not limited to, student progress records at the end of each grading period, portfolios, teacher generated examinations and other methods by which student progress may be assessed. In addition, students will take home weekly completed schoolwork to keep parents informed of the nature and quality of work occurring in the classroom. The School shall encourage teachers to explore meaningful measurable outcomes to supplement the above instruments and promote teacher accountability.

<b>Measurable pupil outcomes</b>	<b>Local Benchmark Instruments</b>	<b>State-level Year-end assessments</b>
85% student achievement of the state content standards each year in its core subjects.	Student progress records, portfolios, locally developed/adopted content and skill assessment instruments	Current state accountability measures: for example, STAR: CAT6, SAT9, writing assessments
At least 85% of students will show one grade or skill level's worth of progress each academic year, as evidenced by scores on the CAT 6 exam.	Practice sheets as needed	Current state accountability measures: for example, STAR: CAT6, SAT9, writing assessments
At least 85% student attendance	Daily attendance reporting	Calculated ADA rate
Maintain or exceed the Academic Performance Index of the former traditional school site. Academic performance index	Annual growth targets	Current state accountability measures: for example, STAR: CAT6, SAT9, writing assessments

#### IV. GOVERNANCE STRUCTURE OF THE SCHOOL

*The governance structure of the school, including, but not limited to, the process to be followed by the school to ensure parental involvement.  
- California Education Code Section 47605 (b) (5) (D)*

The School will be non-sectarian in its programs, admissions policies, employment practices, and all other operations. The School shall not charge tuition and shall not discriminate on the basis of race, ethnicity, national origin, gender or disability.

The School shall be operated as a California 501(c)(3) non-profit public benefit corporation separate from its supporting Foundation. The Articles of Incorporation are filed with the California Secretary of State. The School shall be governed pursuant to its Corporate Bylaws which shall be consistent with this charter. Pursuant to Education Code Section 47604(c), the District County Office shall not be liable for the debts and obligations of the School, operated as a California non-profit, public benefit corporation.

The School shall operate autonomously from the District County Office with the exception of supervisory oversight and special education services as required by statute.

##### A. NON-PROFIT BOARD OF DIRECTORS

The School will be governed by a non-profit board of directors, whose major roles and responsibilities will include but not be limited to establishing and approving all major educational and operational policies, approving all major contracts, approving the School's annual budget, overseeing the school's fiscal affairs, meeting corporate requirements, and selecting and evaluating the administrative staff.

##### Duties

The School Board shall have ultimate responsibility for the operation and activities of the School. School Board members have a responsibility to solicit input from, and opinions of, the parents of School students regarding issues of significance and to weigh the input and opinions carefully before taking action. The primary method for executing their responsibility is the adoption of policies that offer guidance and interpretation of the charter, and procedures to assist the staff in facilitating the implementation of such policies.

The School Board will meet at least once a month or additionally as needed and will be responsible for carrying out School Board responsibilities including but not limited to the following:

- Development, review, or revision of the School's accountability and mission;
- Review of the recommendations from the School Principal and hiring

committee for the hiring of School personnel or independent contractors;

- Development of the school calendar and schedule of School Board meetings;
- Development of School Board policies and procedures
- Development and approval of the annual budget;
- Review of recommended curriculum changes as needed;
- Review of requests for out of state or overnight field trips;
- Participation in the dispute resolution procedure and complaint procedures when necessary;
- Review of quarterly financial reports;
- Election of a School Board Chairperson annually and other Officers as necessary;
- Approval of charter amendments;
- Approval of annual fiscal and performance audits;
- Approval of personnel discipline (suspensions or dismissals) as needed;
- Appoint an administrative panel to act as a hearing body and take action on recommended student expulsions; and
- Hiring, supervision, evaluation, and if necessary, termination of the School Principal.
- Creation of external or sub-committees as needed including but not limited to a hiring committee, a compensation committee, and an audit committee.

The School Board may initiate and carry on any program, activity or may otherwise act in any manner which is not in conflict with or inconsistent with, or preempted by, any law and which are not in conflict with the purposes for which schools are established.

All meetings of the School Board shall be held in accordance with the Brown Act.

Unless necessity dictates otherwise, a School Board member shall not vote or participate in a discussion relating to a matter in which he/she has a direct personal financial interest (exceeding \$100). The Board shall adopt policies and procedures

regarding self dealing and conflicts of interest.

The School Board may execute any powers delegated by law to it and shall discharge any duty imposed by law upon it and may delegate to an employee of the School any of those duties. The School Board, however, retains ultimate responsibility over the performance of those powers or duties so delegated. Such delegation will:

- Be in writing;
- Specify the entity designated;
- Describe in specific terms the authority of the School Board being delegated, any conditions on the delegated authority or its exercise, and the beginning and ending dates of the delegation; and
- Require an affirmative vote of a majority of School Board members.

## B. SCHOOL PRINCIPAL

The Principal is to the School Board what the Superintendent of Schools is to the ~~District~~ County Board of Education.

The Principal communicates directly with the School Board, and to the ~~District~~ County Board of Trustees-Education through its Superintendent or designee. The School Principal is fully responsible for the administration of the School. These responsibilities may include, but are not limited to:

Coordination of the activities of the various operating bodies of the school.

Attend meetings with the Chief Financial Officer of the ~~District~~ County Office on fiscal oversight issues at least bi-monthly.

Attend ~~District~~ County Office Administrative meetings to be part of the ~~District~~ County "Administrative Team" and stay in direct contact with ~~District~~ County changes, progress, etc.

Attendance at all School Board meetings, and attendance as necessary at ~~District~~ County Board of Education meetings as a charter representative.

Develop School Board meeting agenda in conjunction with the School Board secretary in compliance with the Brown Act.

Compile and/or create supporting materials for the School Board meetings to be made available to the School Board at least one week in advance of each School Board meeting.

Supervise, either directly or through subordinates, all employees of the School.

Provide assistance and coordination to the Faculty in the development of curriculum.

Appoint with School Board approval, a Hiring Committee for Faculty hiring that includes School Board, Faculty, and parent representation.

Participate on Hiring Committee and present written recommendations to the School Board for final approval.

Draft interview questions to be used by the Hiring Committees in conjunction with Hiring Committee members.

Provide timely performance evaluations of all School employees at least annually.

Upon the direction of the School Board, termination of School employees in accordance with established policies and procedures.

Development and administration of the budget in accordance with generally accepted accounting principles.

Make budget line item revisions when necessary and report changes regularly to the School Board.

Oversee parent/student/teacher relations.

Attendance at IEP meetings when necessary.

Student disciplinary matters.

Proposal of policies for adoption by the School Board

Provide comments and recommendations regarding policies presented by others to the school Board.

Establishment of procedures designed to carry out School Board policies.

Create and appoint committees to assist in the execution of certain planning and administrative functions (known as "Director appointed committees").

Site safety.

Fostering an amicable relationship between District County Office and School and facilitate a sharing of resources between both entities.



Establish a Communication Model to facilitate communication among all the groups within the School, between the School and the DistrictCounty Office, and between the School and the community at large.

Scheduling.

Graduations.

Communicating with School legal counsel.

Staying abreast of School laws and legislation.

Coordinating the communications of the recommendations of any Director appointed committees to the attention of the Board.

Manage communications between DistrictCounty Office, the Superintendent of Schools and School Board.

Develop the School annual performance audit.

Present performance audit to the School Board and upon review of the School Board present audit to the ~~District Board of Trustees~~County Board of Education and the DistrictCounty Superintendent of Schools.

Approval of all purchase orders, pay warrants and requisitions, and upon approval forward on for processing.

Presentation of a quarterly financial report to the School Board.

Participation in the dispute resolution procedure and the complaint procedure when necessary.

Plan and coordinate student orientation.

Coordinate the administration of Standardized Testing.

Grant writing.

Communicate employment vacancies to the public.

Assist in development and implementation of curriculum.

Establish and execute enrollment procedures.

Facilitate open house events.

The above duties may be delegated or contracted as approved by the School Board to a business administrator of the School or other employee, a parent volunteer (only in accordance with student and teacher confidentiality rights) or to the ~~District~~County Office or a third-party provider.

### C. FACULTY

The Faculty, as provider of the day-to-day teaching and guidance to the children, is the primary resource of the school. All Faculty report to the Principal. The Principal shall provide ongoing feedback during the course of the year to foster continuous improvement along with periodic evaluations as appropriate.

The Faculty will be responsible for making recommendations to the Principal and assisting the Principal in the creation of and the implementation of the curriculum and ensuring that the curriculum reflects the mission of the School as well as recommendations regarding the purchase of any supporting curricular materials, programs or devices. Such recommendations include but are not limited to:

- . selection of textbooks
- . selection of computer programs
- . selection of learning programs
- . selection and planning of field trips
- . selection and administration of assignments, projects and exams
- . selection of and implementation of the grading rubric
- . student counseling as appropriate
- . initiation and implementation of new curriculum or classes
- . selection of extra-curricular activities
- . participation in the School dispute resolution procedure and complaint procedure when necessary

Participation in an advisory capacity to the School Board shall not disqualify any employee of the School from the full exercise of any right or the entitlement to any benefit afforded employees of the school.

**D. CHAIRPERSON OF THE BOARD**

The Chairperson of the School Board shall conduct all School Board meetings. The School Board shall elect the chair during its first regular meeting following the seating of newly elected members. In the absence of the Chair, a School Board designee shall conduct meetings. The Chairperson shall develop the meeting agenda in conjunction with the Principal. The Chair shall participate in the dispute resolution procedure and the complaint procedure as necessary. The Chair shall also direct the Board's annual evaluation of the Principal.

**E. FACULTY CHAIR**

The Faculty Chair, or designee, will be responsible for attending all School Board meetings and all Faculty meetings. The Faculty Chair shall be elected by the faculty at the first staff meeting at the beginning of the school year. The Faculty Chair will be responsible for communicating the recommendations of the faculty to the Principal and assisting the Principal with curriculum implementation. The Faculty Chair will participate in the dispute resolution procedure and the complaint procedure as necessary and will be the faculty representative on the hiring committee, or may appoint a designee. The Faculty Chair may act in an administrative capacity in the absence of the Principal unless otherwise decided by the board for reason of:

- Illness;
- Administrative duties;
- Vacation;
- Temporary vacancy in position;
- Emergency on site when the Principal is not on site.

**F. HIRING COMMITTEE**

All full-time and part-time prospective employees of the School will be screened and interviewed by a hiring committee which will make a recommendation to the Principal for a final decision and ratification by the School Board.

The hiring committee shall consist of the Principal, and other member appointed by the School Board.

The Principal shall be responsible for drafting interview questions.

A vacant position for the Principal will be filled by the School Board upon a prior recommendation of a committee of the School Board. The Committee shall consist of a parent representative appointed by the School Board, a member of the School Board, and the Faculty Chair.

All hiring is subject to each employee submitting fingerprints and receiving a criminal background summary and clearance as described in Education Code Section 44237.

#### **G. PARENT PARTICIPATION**

All parents and staff shall be members of a Parent/Teacher Council ("PTC") which shall present a forum for facilitating communication among parents and participation in school activities, similar in function to a typical Parent Teacher Association.

The PTC shall be governed by a three member governing body. The initial members of the governing body shall be appointed by the School Board. Subsequent members shall be elected to the governing body of the PTC. The PTC operate in accordance with bylaws developed by the PTC.

The PTC is a means by which parents contribute time and skills toward the betterment of the children and the School. The PTC shall maintain a list of active committees. By their nature, the Committees will work with various bodies within the School, providing support activities as appropriate.

To encourage additional parent involvement, the School shall at a minimum also do the following:

- . develop an ongoing list of extensive participation opportunities for parents;
- . offer extra-curricular activities for both student and parent participation.

#### **H. CONFLICTS CODE**

The School shall adopt and shall abide by a Conflicts Code.

#### **I. BROWN ACT**

All meetings of the School Board shall be noticed and held in accordance with the Brown Act.

## V. EMPLOYEE QUALIFICATIONS

*The qualifications to be met by individuals to be employed by the school.  
- California Education Code Section 47605 (b) (5) (E)*

### TEACHERS

The charter school shall comply with Education Code Section 47605(l) which states in pertinent part:

“Teachers in charter schools shall be required to hold a Commission on Teacher Credentialing certificate, permit or other document equivalent to that which a teacher in other public schools would be required to hold. These documents shall be maintained on file at the charter school and shall be subject to periodic inspection by the chartering authority. It is the intent of the Legislature that charter schools be given flexibility with regard to non-core, non-college preparatory courses.”

Teachers are expected to meet both individual and School standards for effective teaching. Some of the Elementary responsibilities include evaluating student progress, communicating with parents and supervising playground time. To be considered for this position, a teacher must meet the following minimum requirements:

1. Skills/knowledge-

Must maintain minimum educational and experience requirements necessary to meet certification or credential requirements for an elementary or grade school teacher as amended or implemented from time to time.

2. Experience/education-

Prior teaching experience preferred but not required. Education or substituted experience acceptable to the State of California which meets the certification or credential standards established for elementary or grade school teachers.

3. Fingerprint and medical health clearance is mandated.

### PRINCIPAL

The school Principal supervises the campus teachers, and non-instructional staff. Some of the Principal's responsibilities include training, hiring, admissions and marketing as previously outlined in this Charter. To be considered for this position, an individual must have:

1. High school graduate or GED
2. A BA degree with at least one year of teaching.
3. An administrative credential.

4. Fingerprint and medical health clearance is mandated.

#### **NON-INSTRUCTIONAL STAFF**

All non-instructional staff must possess experience and expertise appropriate for their position. Fingerprint and medical health clearance is mandated.

#### **ALL STAFF**

Employees are expected to conduct themselves at all times in a manner consistent with the highest standards of personal character and professionalism, with children, parents, prospective parents, co-workers, and the community.

Attitude is the most important facet of each employee's presentation of the School to the public. Employees must be courteous, tactful, and pleasant at all times, treating the most unpleasant people as well as they treat the most pleasant ones.

#### **VOLUNTEERS**

The School welcomes parent or community volunteers. Volunteers shall be fingerprinted and receive a background clearance before volunteering on campus, unless the volunteer will be under the direct supervision of a credentialed employee at all times or unless the volunteer will not come into any contact, even limited with students.

## VI. HEALTH AND SAFETY PROCEDURES

*The procedures that the school will follow to ensure the health and safety of pupils and staff. These procedures shall include the requirement that each employee of the school furnish the school record summary as described in Section 44237.  
- California Education Code Section 47605 (b) (5) (F)*

To the extent the School does not have a specific health and safety policy in place, the health and safety policies of the ~~District~~ Los Altos School District shall control and be applicable to the students and staff of the Bullis Charter School, until such time as the School implements its own. These policies include the requirement that each employee be fingerprinted and furnish the School with a criminal record summary as described in Section 44237, and the requirement that all employees provide proof of a clear tuberculosis test within the last four years. Students must provide proof of immunizations and health screening.

These policies shall be incorporated as appropriate into a student and staff handbooks and shall be reviewed on an ongoing basis by a committee of the School Board. Any additional health and safety policies and procedures along with any revisions of existing policies and procedures shall be submitted annually to the ~~District~~ County Board of Education as part of the annual programmatic audit of the School.



**VII. MEANS TO ACHIEVE RACIAL/ETHNIC BALANCE  
REFLECTIVE OF THE DISTRICT**

*The means by which the school will achieve racial and ethnic balance among its pupils that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted.*

*-- California Education Code Section 47605 (b) (5) (G)*

The School shall implement a student recruitment strategy that includes, but is not necessarily limited to, the following elements or strategies to attempt to achieve a racial and ethnic balance among students that is reflective of the general population residing within the territorial jurisdiction of the Los Altos School District:

- An enrollment process that is scheduled and adopted to include a timeline that allows for a broad-based recruiting and application process.
- The development of promotional and informational material that appeals to all of the various racial and ethnic groups represented in the District.
- The distribution of promotional and informational materials to a broad variety of community groups and agencies that serve the various racial, ethnic, and interest groups represented in the District.
- Outreach meetings.

## VIII. ADMISSION REQUIREMENTS

*Admission requirements, if applicable.*  
*- California Education Code Section 47605(b) (5) (H)*

### ENROLLMENT POLICY

All students who reside in the State of California may attend the School subject only to capacity at each grade level.

### APPLICATION PROCESS

The application process is comprised of the following:

- Completion of a student enrollment form
- Proof of immunization and physical exam
- Proof of withdrawal from previous school
- Home language survey
- Provision of a copy of official birth certificate
- Signed cumulative record request
- Completion of emergency medical card

With the exception of the initial year, applications will be accepted during an open enrollment period from March 1 to May 1 for enrollment in the following school year. For the initial year, applications will be accepted during an open enrollment period that is held for the first thirty (30) days after charter approval. Following the open enrollment period, each year applications shall be counted to determine whether any grade level at any site has received more applications than availability. In this event, the School will hold a public random drawing to determine enrollment for the impacted grade level, with the exception of existing students who are guaranteed enrollment in the following school year.

Enrollment preferences in the case of a public random drawing shall be allowed as follows:

1. Children of Original Founders of School, as defined as those individuals who have documented 40 or more volunteer hours in development of the School;
2. Children of School employees;
3. Children who reside in Los Altos Hills and/or in the former Bullis-Purissima Elementary School boundaries;
4. Siblings of current and/or former Bullis Charter School students and siblings of former Bullis Purissima School students;
5. Los Altos School District residents;
6. Santa Clara County residents;

7. All others.

A waitlist will be established in each numbered priority group. Applicants who were waitlisted in the previous year will be given preference within their numbered priority group in a subsequent year's lottery.

Students who are currently under an expulsion from a public school may not enroll in the School until the expulsion term has been documented as completed and the Student completes the rehabilitation plan created by the former school or as created by the School on behalf of the student.

At the conclusion of the lottery, all students who were not granted admission due to capacity shall be given the option to put their name on a wait list according to their draw in the lottery. This waitlist will allow students the option of enrollment in the case of an opening during the school year.

In no circumstance will a wait list carry over to the following school year.

## IX. FINANCIAL AND PROGRAMMATIC AUDIT

*The manner in which an annual, independent, financial audit shall be conducted, which shall employ generally accepted accounting principles, and the manner in which audit exceptions and deficiencies shall be resolved to the satisfaction of the chartering authority.*

*- California Education Code Section 47605 (b) (5) (I)*

### FISCAL AUDIT

The School will facilitate an annual independent audit of the School's financial affairs.

The audit will verify the accuracy of the School's financial statements, attendance and enrollment accounting practices, and review the school's internal controls. The audit will be conducted in accordance with generally accepted accounting principles applicable to the School. To the extent required under applicable federal law, the audit scope will be expanded to include items and processes specified in any applicable Office of Management and Budget Circulars. It is anticipated that the annual audit will be completed four months of the close of the fiscal year and that a copy of the auditor's findings will be forwarded to the chief financial officer of the DistrictCounty Office, and to the CDE by December 15<sup>th</sup> each year. The School's Principal along with an audit committee will review any audit exceptions or deficiencies and report to the School's Board with recommendations on how to resolve them. The School Board will submit a report to the DistrictCounty Office describing how the exceptions and deficiencies have been or will be resolved. Any disputes regarding the resolution of audit exceptions and deficiencies will be referred to the dispute resolution process contained in Section XIV of this Charter.

### PROGRAMMATIC AUDIT

The School will compile and provide to the DistrictCounty Office an annual performance report. This report will, at a minimum, include the following data:

- Summary data showing student progress toward the goals and outcomes specified in Section II from assessment instruments and techniques listed in Section III.
- An analysis of whether student performance is meeting the goals specified in Section II. This data will be displayed on both a School-wide basis and disaggregated by major racial and ethnic categories to the extent feasible without compromising student confidentiality.
- A summary of major decisions and policies established by the School Board during the year.
- Data on the level of parent involvement in the School's governance (and other aspects of the school, if applicable) and summary data from an annual parent and student satisfaction survey.

- Data regarding the number of staff working at the school and their qualifications.
- A copy of the school's health and safety policies and/or a summary of any major changes to those policies during the year.
- Information demonstrating whether the School implemented the means listed in charter Element VII. to achieve a racially and ethnically balanced student population.
- An overview of the School's admissions practices during the year and data regarding the numbers of students enrolled, the number on waiting lists, and the numbers of students expelled and/or suspended.
- Analyses of the effectiveness of the School's internal and external dispute mechanisms and data on the number and resolution of disputes and complaints.
- Other information regarding the educational program and the administrative, legal, and governance operations of the School relative to compliance with the terms of the charter generally.

| The School and ~~District~~County Office will jointly develop the content, evaluation criteria, timelines, and process for the annual performance report.

| The School and ~~District~~County Office will also jointly develop an annual site visitation process and protocol to enable the grantor to gather information needed to confirm the school's performance and compliance with the terms of this charter.

## **X. PUPIL SUSPENSION AND EXPULSION**

### ***The procedures by which pupils can be suspended or expelled. - California Education Code Section 47605 (b) (5) (J)***

This Pupil Suspension and Expulsion Policy has been established in order to promote learning and protect the safety and well-being of all students at the School. When the Policy is violated, it may be necessary to suspend or expel a student from regular classroom instruction.

School staff shall enforce disciplinary rules and procedures fairly and consistently amongst all students. This Policy and its Procedures will be printed and distributed as part of the Student Handbook and will clearly describe discipline expectations.

Discipline includes but is not limited to advising and counseling students, conferring with parents/guardians, detention during and after school hours, the use of alternative educational environments, suspension and expulsion.

Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of, or willfully causing the infliction of, physical pain on a student. For purposes of the Policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent damage to school property.

The Principal shall ensure that students and their parents/guardians are notified in writing upon enrollment of all discipline policies and procedures. The notice shall state that this Policy and Administrative Procedures are available on request at the Principal's office.

Suspended or expelled students shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension or expulsion.

A student identified as an individual with disabilities or for whom the School has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities in Education Act ("IDEA") or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 (Section 504) is subject to the same grounds for suspension and expulsion and is accorded the same due process procedures applicable to regular education students except when federal and state law mandates additional or different procedures. The School will follow Section 504 of the Rehabilitation Act, Individuals with Disabilities in Education Act (IDEA), the Americans with Disabilities Act (ADA) of 1990 and all federal and state laws when imposing any form of discipline on a student identified as an individual with disabilities or for whom the School has a basis of knowledge of a suspected disability or who is otherwise qualified for such services or protections in according due process to such students.

A. Definitions (as used in this policy)

1. "Board" means governing body of the School.
2. "Expulsion" means disenrollment from the School.
3. "School day" means a day upon which the School is in session or weekdays during the summer recess.
4. "Suspension" means removal of a pupil from ongoing instruction for adjustment purposes. However, "suspension" does not mean the following:
  - a. Reassignment to another education program or class at the School where the pupil will receive continuing instruction for the length of day prescribed by the School Board for pupils of the same grade level.
  - b. Referral to a certificated employee designated by the Principal to advise pupils.
  - c. Removal from the class but without reassignment to another class for the remainder of the class period without sending the pupil to the Principal or designee.
5. "Pupil" includes a pupil's parent or guardian or legal counsel or other representative.
6. "School" means the School.

B. Grounds for Suspension and Expulsion of Students

A student may be suspended or expelled for prohibited misconduct if the act is related to school activity or school attendance occurring at the School or at any other school or a School sponsored event at any time including but not limited to: a) while on school grounds; b) while going to or coming from school; c) during the lunch period, whether on or off the school campus; d) during, going to, or coming from a school-sponsored activity.

C. Enumerated Offenses

Students may be suspended or expelled for any of the following acts when it is determined the pupil:

1. Caused, attempted to cause, or threatened to cause physical injury to another person or willfully used force or violence upon the person of another, except in self-defense.
2. Possessed, sold, or otherwise furnished any firearm, knife, explosive, or other dangerous object unless, in the case of possession of any object of this type, the

student had obtained written permission to possess the item from a certificated school employee, with the Principal/Administrator or designee's concurrence.

3. Unlawfully possessed, used, sold or otherwise furnished, or was under the influence of, any controlled substance as defined in Health and Safety Code 11053-11058, alcoholic beverage, or intoxicant of any kind.
4. Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code 11053-11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.
5. Committed or attempted to commit robbery or extortion.
6. Caused or attempted to cause damage to school property or private property.
7. Stole or attempted to steal school property or private property.
8. Possessed or used tobacco or any products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel.
9. Committed an obscene act or engaged in habitual profanity or vulgarity.
10. Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code 11014.5
11. Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, other school officials, or other school personnel engaged in the performance of their duties.
12. Knowingly received stolen school property or private property.
13. Possessed an imitation firearm, i.e., a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
14. Committed or attempted to commit a sexual assault as defined in Penal Code 261, 266c, 286, 288, 288a or 289, or committed a sexual battery as defined in Penal Code 243.4.
15. Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.



16. Made terrorist threats against school officials and/or school property.
17. Committed sexual harassment.
18. Caused, attempted to cause, threatened to cause, or participated in an act of hate violence.
19. Intentionally harassed, threatened or intimidated a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder, and invading student rights by creating an intimidating or hostile educational environment.

The above list is not exhaustive and depending upon the offense, a pupil may be suspended or expelled for misconduct not specified above.

Alternatives to suspension or expulsion will first be attempted with students who are truant, tardy, or otherwise absent from assigned school activities.

#### D. Suspension Procedure

Suspensions shall be initiated according to the following procedures.

##### 1) Informal Conference

Suspension shall be preceded, if possible, by an informal conference conducted by the Principal or the Principal's designee with the student and his or her parent and, whenever practicable, the teacher, supervisor or school employee who referred the student to the Principal.

The conference may be omitted if the Principal or designee determines that an emergency situation exists. An "emergency situation" involves a clear and present danger to the lives, safety or health of students or school personnel. If a student is suspended without this conference, both the parent/guardian and student shall be notified of the student's right to return to school for the purpose of a conference.

At the conference, the pupil shall be informed of the reason for the disciplinary action and the evidence against him or her and shall be given the opportunity to present his or her version and evidence in his or her defense.

This conference shall be held within two school days, unless the pupil waives this right or is physically unable to attend for any reason, including, but not limited to incarceration or hospitalization.

No penalties may be imposed on a pupil for failure of the pupil's parent or guardian to attend a conference with school officials. Reinstatement of the suspended pupil shall not be contingent upon attendance by the pupil's parent or guardian at the conference.

2) Notice to Parents/Guardians

At the time of the suspension, a School employee shall make a reasonable effort to contact the parent/guardian by telephone or in person. Whenever a student is suspended, the parent/guardian shall be notified in writing of the suspension. This notice shall state the specific offense committed by the student. In addition, the notice may also state the date and time when the student may return to school. If school officials wish to ask the parent/guardian to confer regarding matters pertinent to the suspension, the notice may request that the parent/guardian respond to such requests without delay.

3) Suspension Time Limits/Recommendation for Expulsion

Suspensions, when not including a recommendation for expulsion shall not exceed five (5) consecutive school days per suspension.

Upon a recommendation of expulsion by the Principal, the pupil and the pupil's guardian or representative will be invited to a conference to determine if the suspension for the pupil should be extended pending an expulsion hearing. This determination will be made by the Principal upon either of the following determinations: 1) the pupil's presence will be disruptive to the education process; or 2) the pupil poses a threat or danger to others. Upon either determination, the pupil's suspension will be extended pending the results of an expulsion hearing.

E. Authority to Expel

A student may be expelled either by the School Board following a hearing before it or by the School Board upon the recommendation of an Administrative Panel to be assigned by the School Board as needed. The Panel should consist of at least three members. The Administrative Panel may recommend expulsion of any student found to have committed an expellable offense.

F. Expulsion Procedures

Students recommended for expulsion are entitled to a hearing to determine whether the student should be expelled. Unless postponed for good cause, the hearing shall be held within thirty (30) school days after the Principal or designee determines that the Pupil has committed an expellable offense.

The expulsion hearing will be presided over by the School Board President Chair or the chair of the Administrative Panel. In the event an administrative panel hears the case, it will make a recommendation to the Board for a final decision whether to expel. The hearing shall be held in closed session unless the pupil makes a written request for a public hearing three (3) days prior to the hearing.

Written notice of the hearing shall be forwarded to the student and the student's parent/guardian at least ten (10) calendar days before the date of the hearing. Upon mailing the notice, it shall be deemed served upon the pupil. The notice shall include:

- 1) The date and place of the expulsion hearing;
- 2) A statement of the specific facts, charges and offenses upon which the proposed expulsion is based;
- 3) A copy of the School's disciplinary rules which relate to the alleged violation;
- 4) Notification of the student's or parent/guardian's obligation to provide information about the student's status at the school to any other school district or school to which the student seeks enrollment;
- 5) The opportunity for the student or the student's parent/guardian to appear in person or to employ and be represented by counsel or an advocate;
- 6) The right to inspect and obtain copies of all documents to be used at the hearing;
- 7) The opportunity to confront and question all witnesses who testify at the hearing;
- 8) The opportunity to question all evidence presented and to present oral and documentary evidence on the student's behalf including witnesses.

#### G. Record of Hearing

A record of the hearing shall be made and may be maintained by any means, including electronic recording, as long as a reasonably accurate and complete written transcription of the proceedings can be made.

#### H. Presentation of Evidence

While technical rules of evidence do not apply to expulsion hearings, evidence may be admitted and used as proof only if it is the kind of evidence on which reasonable persons can rely in the conduct of serious affairs. A recommendation by the Administrative Panel to expel must be supported by substantial evidence that the student committed an expellable offense.

Findings of fact shall be based solely on the evidence at the hearing. While hearsay evidence is admissible, no decision to expel shall be based solely on hearsay, and sworn declarations may be admitted as testimony from witnesses of whom the School Board, Panel or designee determines that disclosure of their identity or testimony at the hearing may subject them to an unreasonable risk of physical or psychological harm.

If, due to a written request by the expelled pupil, the hearing is held at a public meeting, and the charge is committing or attempting to commit a sexual assault or committing a sexual battery as defined in Education Code Section 48900, a complaining witness shall have the right to have his or her testimony heard in a session closed to the public.

The decision of the Administrative Panel shall be in the form of a written recommendation to the School Board who will make a final determination regarding the expulsion. The final decision by the School Board shall be made within ten (10) school days following the conclusion of the hearing.

#### I. Written Notice to Expel

The Principal or designee following a decision of the School Board to expel shall send written notice of the decision to expel, including the School Board's findings of fact, to the student or parent/guardian. This notice shall include the following:

- 1) Notice of the specific offense committed by the student.
- 2) Notice of the right to appeal the expulsion to the County Board of Education or if the County is unwilling to hear such appeals, an appellate administrative panel composed of retired or current school administrators or teachers who are not related to the School to hear expulsion appeals but who will follow the expulsion appeal procedures outlined in Education Code Sections 48921-48924.
- 3) Notice of the student's or parent/guardian's obligation to inform any new district in which the student seeks to enroll of the student's status with the School.

The Principal or designee shall send written notice of the decision to expel to the Student's District of residence, the Chartering District and the County Office of Education.

This notice shall include the following:

- a) The student's name
- b) The specific expellable offense committed by the student.

J. Disciplinary Records

The School shall maintain records of all student suspensions and expulsions at the School. Such records shall be made available for the ~~District~~County's review upon request.

K. Expelled Pupils/Alternative Education

Pupils who are expelled shall be responsible for seeking alternative education programs including but not limited to programs within the County or their school district of residence.

L. Rehabilitation Plans

Students who are expelled from the School shall be given a rehabilitation plan upon expulsion as developed by the School Board at the time of the expulsion order, which may include, but is not limited to, periodic review as well as assessment at the time of review for readmission. The rehabilitation plan should include a date not later than one year from the date of expulsion when the pupil may reapply to the School for readmission.

M. Readmission

The decision to readmit a pupil or to admit a previously expelled pupil from another school district or School shall be in the sole discretion of the School Board following a meeting with the Principal and the pupil and guardian or representative, to determine whether the pupil has successfully completed the rehabilitation plan and to determine whether the pupil poses a threat to others or will be disruptive to the school environment. The Principal shall make a recommendation to the School Board following the meeting regarding his or her determination. The pupil's readmission is also contingent upon the School's capacity at the time the student seeks readmission.

## XI. RETIREMENT SYSTEM

*The manner by which staff members of the Schools will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, or federal social security.  
- California Education code Section 47605 (b) (5) (K)*

All Staff will participate in the federal social security system. The school retains the option for its School Board to elect to participate in the State Teachers Retirement System and/or Public Employees Retirement System and coordinate such participation, as appropriate, with the social security system or other reciprocal systems in the future, should it find that participation enables the school to attract and retain a higher quality staff.

Additionally, the School Board may consider offering a 403(b) or alternative or supplemental retirement programs. If applicable, the ~~District~~County Office shall create any reports required by STRS or PERS if applicable at a later date for School employees and shall charge the School for its actual costs of providing this service pursuant to Education Code section 47611.3. The School shall inform all applicants for positions within the School of the retirement system options for employees of the School.

## SALARY AND BENEFITS

All employees of the School shall receive salary and benefits which are at a minimum equivalent to the salary and benefits of the equivalent employees of the Los Altos School District as may be negotiated by the Los Altos School District and the collective bargaining units from time to time.

## XII. ATTENDANCE ALTERNATIVES

*The public school attendance alternatives for pupils residing within the school district who choose not to attend Schools.*

*- California Education code Section 47605 (b) (5) (L)*

Students who opt not to attend the School may attend other schools within their school district of residence, another charter school, or pursue an inter-district transfer in accordance with existing enrollment and transfer policies of their district or county of residence. Enrollment in the School does not generate any entitlement to any other School of the Los Altos School District unless such student is a District resident or is otherwise approved for District admission.

### XIII. DESCRIPTION OF EMPLOYEE RIGHTS

*A description of the rights of any employee of the school district upon leaving the employment of the school district to work in a School and of any rights of return to the school district after employment at a School.*

*- California Education Code Section 47605 (b) (5) (M)*

All staff members of the School shall be considered employees of the School during their employment within the School, with the exception of staff members who are specifically hired as independent contractors. To the extent any employee of the District or County Office leaves the District or County Office to work at the School, the employee shall have the right of return, employment, or gain of seniority at the District or County as long as the employee requests and is granted a leave of absence by the District Board of Trustees or County Board of Education pursuant to any applicable collective bargaining agreement.



#### XIV. DISPUTE RESOLUTION PROCESS, OVERSIGHT REPORTING, AND RENEWAL

*The procedures to be followed by the School and the entity granting the charter to resolve disputes relating to provisions of the charter.*

*- California Education Code Section 47605 (b) (5) (N)*

##### **DISPUTES BETWEEN THE DISTRICTCOUNTY OFFICE OF EDUCATION AND THE SCHOOL**

In the event of a dispute between the School and the DistrictCounty Office of Education, the staff and Board members of the School and DistrictCounty Office of Education agree to first frame the issue in written format and refer the issue to the Superintendent of the DistrictSchools and Principal of the School. In the event that the DistrictCounty Office of Education believes that the dispute relates to an issue that could lead to revocation of the charter, this shall be specifically noted in the written dispute statement.

The Principal and Superintendent shall informally meet and confer in a timely fashion to attempt to resolve the dispute. In the event that this informal meeting fails to resolve the dispute, both parties shall identify two School Board/DistrictCounty Board members from their respective boards who shall jointly meet with the Superintendent of the DistrictSchools and Principal of the School and attempt to resolve the dispute. If this joint meeting fails to resolve the dispute, the Superintendent and Principal shall meet to jointly identify a neutral, third party arbitrator. The format of the arbitration session shall be developed jointly by the Superintendent and Principal, and shall incorporate informal rules of evidence and procedure unless both parties agree otherwise. The findings or recommendations of the arbitrator shall be non-binding, unless the governing boards of the School and DistrictCounty Office of Education jointly agree to bind themselves. Each Party shall bear their own costs of arbitration. Joint costs of arbitration (such as the arbitrator) shall be split equally between both Parties.

If the DistrictCounty Board of Education believes it has cause to revoke this charter pursuant to Education Code Section 47607, the DistrictCounty Office of Education Board agrees to notify the Board of the School in writing, noting the specific reasons for which the charter may be revoked, and grant the School reasonable time to respond to the notice and take appropriate corrective action unless the DistrictCounty Board determines, in writing, that an imminent threat to pupil health and safety exists.

##### **INTERNAL DISPUTES**

- Disputes arising from within the School, including all disputes among and between students, staff, parents, volunteers, advisors, partner organizations, and School Board members, shall be resolved pursuant to policies and processes developed by the School. The DistrictCounty Office shall not intervene in any such internal disputes without the consent of the School Board and shall refer any complaints or reports regarding such disputes to the Board or the

Principal of the School for resolution in keeping with the School's policies. The DistrictCounty Office agrees not to intervene or become involved in the dispute unless the dispute has given the DistrictCounty Office reasonable cause to believe that a violation of this charter or related laws or agreements has occurred, or unless the School Board has requested the DistrictCounty Office to intervene in the dispute.

- Disputes shall first be brought informally to the Principal of the School for resolution.
- The Principal shall track all disputes in writing.
- The Principal shall facilitate discussion and resolution between all parties involved in the dispute.
- If the resolution is not resolved by discussion facilitated by the Principal, the matter may be brought before the School Board. The Principal shall provide a written summary of the dispute and all attempts at resolution for the School Board.
- The decision of the School Board shall be final.

## XV. LABOR RELATIONS

*A declaration whether or not the School shall be deemed the exclusive public school employer of the employees of the School for the purposes of the Educational Employment Relations Act.  
- California Education Code Section 47605(b) (5) (O)*

The School shall be deemed the exclusive public school employer of the employees of the School for the purposes of the Educational Employment Relations Act.

## XVI. AGREED PROCESS ON CLOSURE OF SCHOOL

*A description of the procedures to be used if the charter school closes. The procedures shall ensure a final audit of the school to determine the disposition of all assets and liabilities of the School, including plans for disposing of any net assets and for the maintenance and transfer of pupil records.  
(Education Code Section 47605(b)(5)(P))*

The following procedures shall apply in the event the School closes. The following procedures apply regardless of the reason for closure.

Closure of the School will be documented by official action of the School Board. The action will identify the reason for closure.

The School Board will promptly notify the DistrictCounty Office of the closure and of the effective date of the closure.

The School Board will ensure notification to the parents and students of the School of the closure and to provide information to assist parents and students in locating suitable alternative programs. This notice will be provided promptly following the School Board's decision to close the School.

As applicable, the School will provide parents, students and/or the districtCounty Office with all appropriate student records and will otherwise assist students in transferring to their next school. All transfers of student records will be made in compliance with the Family Educational Rights and Privacy Act ("FERPA"), 20 U.S.C. § 1232g.

As soon as reasonably practical, the School will prepare final financial records. The School will also have an independent audit completed as soon as reasonably practical, which period is generally no more than six months after closure. The School will pay for the final audit. The audit will be prepared by a qualified Certified Public Accountant selected by the School and will be provided to the DistrictCounty Office promptly upon its completion.

On closure of the School, all assets of the School, including but not limited to all leaseholds, personal property, intellectual property and all ADA apportionments and other revenues generated by students attending the School, remain the sole property of the School, and shall be distributed in accordance with the Articles of Incorporation upon the dissolution of the nonprofit public benefit corporation. On closure, the School shall remain solely responsible for all liabilities arising from the operation of the School.

As the School is organized as a nonprofit public benefit corporation, the School Board will follow the procedures set forth in the California Corporations Code for the dissolution of a nonprofit public benefit corporation and file all necessary filings with the appropriate state and federal agencies.

## XVII. MISCELLANEOUS CLAUSES

### TERM

The term of this charter shall begin on the day of DistrictCounty-Board of Education approval and expire five years thereafter at the end of the school year.

### AMENDMENTS

The School Board may make any amendments to this charter. Material revisions and amendments shall be made pursuant to the standards, criteria, and timelines in Education Code Section 47605.

### RENEWAL

The School may submit its charter for renewal to the District County Board of Education any time but in no case later than April 1<sup>st</sup> of the last year.

Renewals shall be governed by the standards and criteria in Education Code Section 47605. Any renewal shall be for a five (5) year term.

### OVERSIGHT AND ADMINISTRATIVE SERVICES

The DistrictCounty Office of Education and School shall operate in accordance with a mutually agreeable Memorandum of Understanding that outlines further details of the legal and fiscal relationship between the DistrictCounty Office of Education and the School. The Memorandum of Understanding shall include, but not be limited to, the following:

- Authority of the School to contract with third parties;
- Direct funding of the School;
- Services to be purchased by the School from the DistrictCounty Office of Education if available, and the fee schedule for such services;
- Special education services and funding formulas;
- Hold harmless/indemnification of the DistrictCounty Office of Education by the School;
- Fiscal reporting requirements to the state, either independently or through the DistrictCounty Office of Education;
- Oversight Requirements of the DistrictCounty Office of Education

# **ARTICLES OF INCORPORATION**



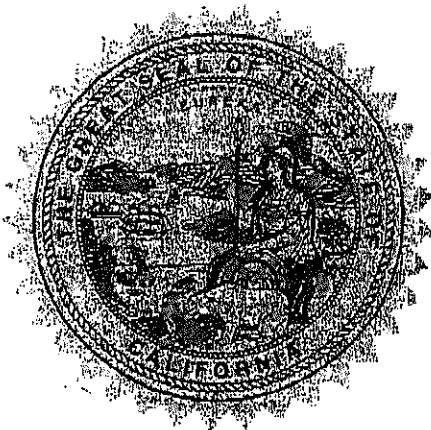
SECRETARY OF STATE

I, *Kevin Shelley*, Secretary of State of the State of California, hereby certify:

That the attached transcript of 2 page(s) has been compared with the record on file in this office, of which it purports to be a copy, and that it is full, true and correct.

*IN WITNESS WHEREOF*, I execute this certificate and affix the Great Seal of the State of California this day of

FEB 2 2 2003



*Kevin Shelley*  
Secretary of State

**ENDORSED - FILED**  
In the office of the Secretary of State  
of the State of California

ARTICLES OF INCORPORATION OF  
THE BULLIS-PURISSIMA ELEMENTARY SCHOOL  
A California Nonprofit Public Benefit Corporation

FEB 13 2003

KEVIN SHELLEY  
Secretary of State

One: The name of the corporation is The Bullis-Purissima Elementary School.

Two: This corporation is a nonprofit public benefit corporation and is not organized for the private gain of any person. It is organized under the Nonprofit Public Benefit Corporation Law for charitable purposes.

Three: This corporation is organized exclusively for charitable purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986 or the corresponding provision of any future United States internal revenue law. Notwithstanding any other provision of these articles, this corporation shall not, except to an insubstantial degree, engage in any activities or exercise any powers that are not in furtherance of the purposes of this corporation, and the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1986 or the corresponding provision of any future United States internal revenue law, or (b) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code of 1986 or the corresponding provision of any future United States internal revenue law.

Four: The name and address of the corporation's initial agent for service of process is Francis A. La Poll, 4151 Middlefield Road, Palo Alto, California 94303.

Five: (a) No substantial part of the activities of this corporation shall consist of lobbying or propaganda, or otherwise attempting to influence legislation, except as provided in Section 501(h) of the Internal Revenue Code of 1986, and this corporation shall not participate in or intervene in (including publishing or distributing statements) any political campaign on behalf of or in opposition to any candidate for public office.

(b) All corporate property is irrevocably dedicated to the purposes set forth in Article Two, above. No part of the net earnings of this corporation shall inure to the benefit of any of its directors, trustees, officers, private shareholders or members, or to individuals.

(c) On the winding up and dissolution of this corporation, after paying or adequately providing for the debts, obligations, and liabilities of the corporation, the remaining assets of this corporation shall be distributed to such organization (or organizations) organized and operated exclusively for charitable, religious, scientific, testing for public safety, literary, or educational purposes, fostering national or international amateur sports competition (but only if no part of its activities involve the provision of athletic



facilities or equipment), or for the prevention of cruelty of children or animals, which has established its tax-exempt status under Section 501(c)(3) of the Internal Revenue Code of 1986 or the corresponding provision of any future United States internal revenue law.

Six: For any year in which the corporation is a private foundation described in the Internal Revenue Code of 1986, then

(a) The corporation will distribute its income for each tax year at such time and in such manner as not to become subject to the tax on undistributed income imposed by Section 4942 of the Internal Revenue Code of 1986 or corresponding provisions of any later federal tax laws.

(b) The corporation will not engage in any act of self-dealing as defined in Section 4941(d) of the Internal Revenue Code of 1986, or corresponding provisions of any later federal tax laws.

(c) The corporation will not retain any excess business holdings as defined in Section 4943(c) of the Internal Revenue Code of 1986, or corresponding provisions of any later federal tax laws.

(d) The corporation will not make any investments in such manner as to subject it to tax under Section 4944 of the Internal Revenue Code of 1986 or corresponding provisions of any later federal tax laws.

(e) The corporation will not make any taxable expenditures as defined in Section 4945(d) of the Internal Revenue Code of 1986, or corresponding provisions of any later federal laws.

DATED: 2/7/2003

Francis A. La Poll

FRANCIS A. LA POLL, Incorporator

I hereby declare that I am the person who executed the foregoing Articles of Incorporation, which execution is my act and deed.

Francis A. La Poll

FRANCIS A. LA POLL



**BULLIS CHARTER SCHOOL  
BOARD OF DIRECTORS**



## Bullis Charter School Board of Directors

### Craig A. T. Jones – Chairman

Mr. Jones is the product of an education family and an educational background. Both of Craig's parents were public school teachers, his father a drama high school teacher, then professor at California State University, Sacramento for 23 years, and his mother a Special Ed. Middle School Teacher. Born and raised in California, he was valedictorian of Davis High School as well as Outstanding Graduating Senior of California State University, Sacramento. He was liaison to the Chancellor of the California State University system and then a lobbyist in Sacramento on behalf of post-secondary public education. He testified before legislative committees in both the Assembly and State Senate on numerous occasions in favor of greater funding for public colleges. He went on to be a Magna Cum Laude graduate of Harvard Law School and has been a strategy consultant in London for Bain & Co. and for the past 19 years a venture capitalist in the U.S. He has served on the Board of Directors of over 25 private companies, including 12 which have gone on to become public companies. He is currently on the Board of Directors of the National Venture Capital Association and Chairman of its Governmental Affairs Committee.

### Mark Breier - President

Mark is an investor/author/speaker. He is Managing Partner for Fast Angels Ventures, providing seed money for technology entrepreneurs. He is author of the 10-Second Internet Manager book and a monthly 10-Second Tips e-newsletter. And he is a frequent public speaker for such clients as American Express, IBM, Leo Burnett, and the US Chamber of Commerce. His business experience includes President/CEO of Beyond.com. VP of Marketing at Amazon.com, and executive positions at Dreyer's/Edy's Ice Cream, Kraft Foods and General Mills. He received his B.A. in economics and M.B.A. from Stanford University. He serves on the Chairman's Council of Conservation International and on the boards of Multi Digit and EcMarkets. Mark is a leader in Los Altos Hills, founding LAH Watchdog and working to preserve the rural nature of Los Altos Hills in its buildings, open space, and pathways. Mark is a co-founder of the charter efforts and is active in core strategies and communications. (More information is available at [www.markbreier.com](http://www.markbreier.com)).

### Nancy Lippe - Director of Education and Curriculum

Nancy received her Ed.D in education from the Fielding Graduate Institute, focusing her studies on collaboration and dialogue as tools for change in public schools. One of her papers appears in Peter Senge's (2000) most recent Fifth Discipline book, Schools That Learn. As a parent of four, she has served in numerous capacities in the public school system including: Los Altos School District Curriculum Council, Bullis-Purissima Elementary School Site Council, Egan Intermediate School Site Council, and chair of various PTA committees over the years. She has also been in the classroom as substitute teacher, instructor in conflict resolution, classroom aide, and coach. Prior to parenthood, Nancy worked in publishing for various educational organizations, including as an editor for Stanford's Human Biology Middle Grades Life Sciences curriculum



series. While pursuing her BA in Human Biology at Stanford (1980), she played field hockey for the US Olympic Team.

#### Diana Neiman - Treasurer

Diana is a former Fellow of the Institute of Chartered Accountants (British equivalent of a CPA). Before retiring 2 years ago, Diana was a Finance Director at Sun Microsystems for 9 years and was previously employed by Apple Computer and Price Waterhouse. She sits on the Board of Directors of a privately held technology company and she provides financial consulting services on a part time basis. She holds 2 patents one of which relates to the design of a distributed budgeting system for global corporations.

#### Doreen Andriacchi - Director of Fundraising

Received a B.S. in Biology at Purdue University, 1979 and a MS in Mechanical Engineering from the University of Illinois at Chicago, 1990. She has experience as an Orthopedic Technician and a Biomedical Research Engineer. As a parent she has served in many capacities throughout the public school setting. Doreen has been invaluable in acquiring in kind donations from local corporations.

#### Stan Mok - Secretary

Stan received his B.S.C. in Business from the University of Santa Clara in 1978. Stan has been with Prudential Securities as a First Vice President and Senior Portfolio Manager. At Prudential, Stan was part of the Pinnacle Group (among the top 100 Financial Advisors in the nation for Prudential Securities in the Investment Management Group). Stan is currently the Principal and Sole Proprietor of Mok Capital Management, A Registered Investment Advisor dealing with financial planning and portfolio management. Having done financial planning and portfolio management for the past 24 years, Stan has the experience and expertise to understand financial management. Being in one of the most government regulated businesses in the nation, Stan has had experience dealing with governmental agencies. Stan has been a past President of the Asian Business League, past Board Director and member of the Los Altos Kiwanis, Past Board Member of AACI (Asians for Community Involvement), Current Board Member and Current Treasurer of the Los Altos Office Complex, Member of the Los Altos Chamber of Commerce, and Member of the Los Altos Educational Fund.

#### Gene Conner - School Site Committee

Received a B.S. and M.S. from Stanford University. Currently he is the Executive Vice President for Advanced Micro Devices (AMD). Mr. Conner has used his considerable expertise in contract negotiations to help secure alternate Los Altos Hills sites for the Charter School for the 2003 school year.

**BULLIS CHARTER SCHOOL  
ADVISORS**



## **Bullis Charter School Advisors**

### Dr. Deborah Stipek - Education / Curriculum Advisor

Dr. Deborah Stipek is the Dean of Education at Stanford University. Dr. Stipek's scholarship concerns instructional effects on children's achievement motivation, early childhood education, elementary education and school reform. Dr. Stipek has an interest in policies affecting children and education, and has become a regular Washington advisor on these issues. She has worked with Head Start and served for five years on the Board on Children, Youth and Families at the National Research Council. While a professor at UCLA, Dr. Stipek served as Director of the Corinne Seeds University Elementary School and the Urban Education Studies Center. She received her B.S. (Psychology) from the University of Washington, 1972 and Ph.D. (Developmental Psychology) from Yale University, 1977.

### Sharon Robison - Education / Curriculum Advisor

Sharon Robison, a 40-year career educator who has been recognized as one of the top 100 educators in North America by Executive Editor magazine. Career highlights include: Superintendent of the Rowland Unified School District (K - 12 / 19,000 student district in Southern California), secondary school assistant superintendent (7 - 12), elementary school principal, and elementary school teacher for 15 years. Her philosophy includes standards-based instructional programs, high accountability for students and educators, development of collaborative work environments, and leadership in professional development.

### Cathi Vogel - School Finance Advisor

Cathi Vogel, has 30 years experience in California public school finance, including CFO for both urban and suburban school districts. Former Chief Financial Officer for the S.F. School District, which operated with a \$500+ million annual budget. Has represented both districts and charter schools in evaluation and service.

### Spector, Middleton, Young & Minney, LLP - Charter School Legal Advisor

Paul Minney and Lisa Corr of Spector, Middleton, Young & Minney, LLP - This Firm serves approximately 150 charter schools in California. With extensive background in legal representation of school districts, the firm began to focus on charter schools in 1992. Since then it has successfully represented more charter schools than any other firm, in development and operation, including litigation.

**BULLIS CHARTER SCHOOL  
FOUNDATION DIRECTORS**



## **Bullis Charter School Foundation Directors**

### Francis A. La Poll - Chair/President

B.A. in Economics Magna Cum Laude from the University of Virginia, 1981; J.D. from Stanford Law School, 1984. Admitted to practice in State, Federal courts, U.S. Tax Court. Editor-in-Chief, Stanford Journal of International Law 1983-1984. Law Clerk, Hon. Procter R. Hug Jr., Chief Judge, U.S. Court of Appeals (9th Cir.) 1984-85. Partner, Gilfix & La Poll Associates (Mr. La Poll has an AV rating from Martindale and Hubbell, highest possible rating for competence and ethics among attorneys). Los Altos City Council (1995 - present), Mayor of Los Altos 1996 - 1997; 2001-2002. Mr. La Poll has served on numerous Boards including, the Los Altos School District Citizens Advisory Committee on Finance; Various City of Los Altos task forces and committees, including city-schools task force. Board Member of various organizations: Palo Alto Senior Housing Project, Inc., Page Mill YMCA (Chair Facilities Committee), Mid-Peninsula YMCA (Past Chair), YMCA Board Development Committee (Chair), YMCA Heritage Club Endowment Committee (past Chair), YMCA Investment Committee (past Chair); Revenue and Taxation Committee of the League of California Cities (1996-2001). He has served as President of the Peninsula Division of the California League of Fitness representing 36 cities in 3 counties and 4 million persons. Board member for the Foothill-De Anza Community College Foundation and member its investment committee. Member of the University of Virginia Planned Giving Technical Advisory Council. Member of the Foothill - De Anza Professional Advisors Round Table. Member of the North County Library Authority. Board Member of the Santa Clara Valley Transportation Authority and former member and Vice-Chair of its Congestion Management Agency. Little League Coach and past Board Member. AYSO (soccer) coach. Father of six (including five currently enrolled in the Los Altos Elementary School District), Mr. La Poll and his wife, Myla, have served in multiple capacities throughout the public school system and will continue to do so for many years to come. Mr. La Poll has extensive technical and practical foundation and fundraising experience.

### Diana Neiman – Treasurer

Diana is a former Fellow of the Institute of Chartered Accountants (British equivalent of a CPA). Before retiring 2 years ago, Diana was a Finance Director at Sun Microsystems for 9 years and was previously employed by Apple Computer and Price Waterhouse. She sits on the Board of Directors of a privately held technology company and she provides financial consulting services on a part time basis. She holds 2 patents one of which relates to the design of a distributed budgeting system for global corporations.

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management. Having done financial planning and portfolio management for the past 24 years, Stan has the experience and expertise to understand financial management. Being in one of the most government regulated businesses in the nation, Stan has had experience dealing with governmental agencies. Stan has been a past President of the Asian Business League, past Board Director and member of the Los Altos Kiwanis, Past Board Member of AACI (Asians for Community Involvement), Current Board Member and Current Treasurer of the Los Altos Office Complex, The Los Altos Chamber of Commerce, and Member of the Los Altos Educational Fund.

#### Doreen Andriacchi - Fundraising Committee

Received a B.S. in Biology at Purdue University, 1979 and a M.S. in Mechanical Engineering from the University of Illinois at Chicago, 1990. She has experience as an Orthopedic Technician and a Biomedical Research Engineer. As a parent she has served in many capacities throughout the public school setting. Doreen has been invaluable in acquiring in kind donations from local corporations.

#### Scott Vanderlip - Communications Director / BCS Newsletter, Web site

Mr. Vanderlip received his BS in Electrical Engineering and Computer Science from Chico State University. Before graduating, he had started his first computer company focusing on microcomputer interfacing products and digital scopes and spectrum analyzers. He went on to work at various computer and software related companies including Systems Control, Oracle, and Neuron Data. In 1986, he started his latest company, Internet Software Sciences providing web-based business software and web consulting services. Mr. Vanderlip has been very active in the community with city and town related committees and also non-profit organizations for many years. During the past 15 years, he has formed and chaired the Los Altos Bicycle Advisory Committee for several years and served on the Los Altos Hills Pathways Committee. He has also helped non-profits including Community Impact, Committee for Green Foothills, Hills 2000. For 4 years he has also been a music docent for first, second or third grade classes at Bullis School. He also organizes the Town of Los Altos Hills annual benefit run for the Parks and Recreation department. In 2001, Scott received the City of Los Altos/Town of Los Altos Hills Joint Community Volunteer Service Award for Los Altos Hills. Mr. Vanderlip lives in Los Altos Hills with his wife and 2 daughters where they are actively involved in their children's education by volunteering time at the school and Girl Scout activities and music docenting. He leads the schools Monthly Walk To School activities and Spring Sing concerts.

#### Alex Atkins - Communications Committee

Alexander Atkins received a B.A. in Psychology, Summa Cum Laude, from Creighton University in 1983 and graduated from Bellarmine College Prep in 1979. He has been a member of Alpha Sigma Nu, the Jesuit Honor Society, since 1981. He has taught typography and graphic design at the University of Santa Cruz Extension Program and Ohlone College. Mr. Atkins is president of Alexander Atkins Design, Inc. (AAD, Inc.). Since its inception in 1983, AAD, Inc. has been committed to supporting education through its sophisticated, award-winning work. AAD, Inc. specializes in the design and production of admission, alumni relations, and development materials for colleges, high schools, and elementary schools. Academic clients include: Stanford University, UC



Berkeley, UC San Diego, Santa Clara University, Menlo College, Creighton University, and Bellarmine College Prep. AAD, Inc. has also worked with many local foundations, including Interplast, the Bannan Foundation, the Lucile Packard Foundation for Children's Health, and the YWCA. In addition, AAD, Inc. has developed identity systems and marketing material for many corporations in the Bay Area. Corporate clients include: Adaptec, Auspex Systems, Hewlett-Packard, KPMG Peat Marwick, Measurex, Octel, Oracle Corporation, Pacific Bell, Siemens, Silicon Graphics, Stanford Medical Center, Syntex, and Wind River Systems. He has won numerous national awards for his work, including recognition from the New York Art Directors Club, Society of Publication Designers, Print Magazine, and the Center for Advancement and Support of Education. His logo work has been recognized and published extensively by Madison Square Press (New York). Mr. Atkins and his wife have three children and live in Los Altos Hills, California.

#### Christopher Vargas - Board Member

Mr. Vargas is currently CEO of Proficient Networks, a San Francisco based Internet startup. Vargas joined Proficient in Nov. '02. Prior to Proficient, Vargas spent 16 months on a private sabbatical. Prior to that, Vargas was President of F-Secure Inc., a subsidiary of F-Secure Ltd, Helsinki Finland. At the time F-Secure had 450 employees and global revenue of \$42M. Vargas led F-Secure's North American operations and was a member of its board of directors. He played a leading role in the company's initial public offering, which was one of the most successful ever in Finland. Mr. Vargas spent eight years at Cisco Systems; his last position was Director of Marketing. Vargas developed and executed marketing strategies for Cisco's Asian, Latin American, and European operations. Other positions included regional sales manager, consultant and technical support manager. In his first role at Cisco Vargas co-founded their Germany operations in 1991. He was Program Manager for the Advanced Networking division of the United States Air Force. He managed a team responsible for developing a new, global standard for secure networked data systems for the USAF intelligence. This team deployed over 19 high-speed, secure internet systems at military installations around the world. In his last assignment he spent three months in the gulf region deploying a secure, operational internet for Desert Storm. After four years of service he departed with the rank of Captain. He is a graduate of the Advanced Management Program at Wharton University and of the Executive Program for Growing Companies at Stanford University. Vargas holds a Master's and a Bachelor's degree in Electrical Engineering from the University of Notre Dame and was a Fulbright scholar to Finland from '87-'88. Vargas has served on a number of boards, including Proficient Networks, F-Secure Ltd, Modera Point Inc. and Vaultline Inc. He lives in Los Altos Hills, CA with his wife and two children.

#### Stacy Ahrens - Education / Curriculum Development Committee

Received her M.Ed. at Mills College in multiple subjects (K-8) Teaching Credential. She brings professional experience teaching Kindergarten and First Grade in the public school setting. She served Director and Curriculum Coordinator at the Preschool level.



Anne Marie Gallagher.

Anne Marie is currently the full-time mother to three children from ages one to eight years. Previous business experience includes work as a Management Consultant in the area of general management/business strategy, corporate accounts marketing for Microsoft, and public relations at Waggener Edstrom. Recent volunteer work includes various fundraising leadership positions in the Junior League of Minneapolis, including nomination to the Board as Vice President of Marketing; Special Gifts committee member for Stanford University 15-year Reunion; and hours logged as room mother and shelving books in the school library. She has an undergraduate degree in sociolinguistics from Stanford University and an MBA from the Anderson School of Management at UCLA.

**BULLIS CHARTER SCHOOL PLANNED  
COMPLIANCE WITH THE BROWN ACT  
AND PUBLIC RECORDS ACT**

**Bullis Charter School Planned Compliance  
with the Brown Act and Public Records Act**

(as required by County Board Administrative Regulations 6230  
Section 2.0 subdivision (d) and subdivision (e)).

Public Records Act<sup>1</sup>:

The Bullis Charter School recognizes and shall comply with its requirements under the Public Records Act, California Government Code Section 6251 et.seq. including but not limited to the requirement to respond to requests for public records within 10 days and provide public records within a reasonable amount of time thereafter as required by law. Additionally, the Bullis Charter School recognizes that Education Code Section 47604.3 requires the Charter School to promptly respond to all inquiries, including, but not limited to, inquiries regarding its financial records from the chartering authority (i.e., County Board of Education), and the Superintendent of Public Instruction. Bullis Charter School fully intends to comply with this section as it relates to all records of the approved charter. However, it should be noted that the Charter School is cognizant of its responsibility to comply with the Family Educational Rights and Privacy Act (FERPA) under federal law (20 U.S.C.A.1232g) and other privacy laws related to personnel records (i.e., confidential medical information, etc.).

The Brown Act<sup>2</sup>

Bullis Charter School, as a parent and community driven effort values the input from parents and community members regarding the educational design and operation of the school. Bullis Charter School is committed to compliance with all applicable state and federal laws. Bullis Charter School shall comply with all requirements of the Brown Act, Government Code 54950 et. seq. including, but not limited to the notice requirements, the open meeting requirements, and all requirements for giving the public an opportunity to be heard.

Furthermore, Bullis Charter School is committed to compliance with all state and federal laws preventing conflicts of interest.

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<sup>1</sup> Administrative Regulation Section 6230, Section 2.0(d) states as follows:

“A description of how the charter school will facilitate the sponsoring agency’s compliance with the Public Records Act.” Petitioner is not entirely clear what the County Board intended by this section. In Board Policy 6230 Section 2.1, the sponsoring agency is defined as the school District that denied the petition. We assume, however, for purposes of appeal that the County Board would like a description of how the charter school intends to comply with the Public Records Act. As such, the following description is intended to outline how the charter school will comply with the Public Records Act.

<sup>2</sup> “A description of how the charter school will facilitate the sponsoring agency’s compliance with the Brown Act.” Petitioner is not entirely clear what the County Board intended by this section. In Board Policy 6230 Section 2.1, the sponsoring agency is defined as the school district that denied the petition. We assume, however, for purposes of appeal that the County Board would like a description of how the Charter School intends to comply with the Brown Act. As such, the following description is intended to outline how the Charter School will comply with the Brown Act.

# **LETTERS OF SUPPORT**

MICHAEL GILFIX  
MYRA GERSON GILFIX  
FRANCIS A. LA POLL  
ROSMARY S. BARTSCH  
VALERIE M. LOGSDON  
PETER TRUMAN  
JEAN RASTETTER RASCH

GILFIX & LA POLL  
ASSOCIATES  
Legal and Consulting Services

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4151 Middlefield Road  
Suite 213  
Palo Alto, CA 94303  
Telephone: (650) 493-8070  
Gil-Fax: (650) 493-4668

SAN JOSE OFFICE  
Suite 1113  
950 South Bascom Avenue  
San Jose, CA 95128  
(408) 971-7292

May 15, 2003

To Whom It May Concern:

I write to support the grant application of Bullis Charter School. As a concerned citizen, I appreciate the benefit of a community-based school to our neighboring town of Los Altos Hills, as well as to that significant portion of Los Altos which currently finds itself without a neighborhood public school. Such schools are vital to community vibrancy.

With my background as a current Los Altos City Councilmember and former two-term Mayor, I find that neighborhood schools also reinforce our City goals. At a time when we have as our highest City priorities traffic safety and working with schools, and are spending or plan to spend millions of dollars on projects to promote accessibility and bike and pedestrian safety, particularly along routes to schools, neighborhood schools further City safety, school-related, and environmental goals by allowing children to walk and bike to school. (I would note that the Los Altos City Council generally does not take positions on school-related matters and has not in this instance.)

The team that has been assembled to launch this exciting effort is exceptional. The many involved business and community leaders and educators are well-poised to create a strong school which will provide a challenging and broad educational experience for the children of Los Altos Hills and Los Altos. The Bullis Charter group is wisely using a highly competent team of professional advisors and consultants to augment its own skills, creating a strong foundation for success.

Your support of these efforts will enable Bullis Charter to cover the very significant start-up and early implementation costs associated with launching a new and innovative school. I look forward to your participation in this exciting effort.

Sincerely yours,  
GILFIX AND LA POLL ASSOCIATES



FRANCIS A. LA POLL  
Attorney at Law

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Los Altos Hills, CA 94022  
650-948-6556 (tel) 650-948-6516 (fax)  
[kimcc@pacbell.net](mailto:kimcc@pacbell.net)

May 1, 2003

To whom it may concern:

I write to endorse the Bullis Charter Elementary School in Los Altos Hills, California as a cause worthy of support.

The new school seeks excellence in academic performance via a combination of individual curriculums, community support, and excellent teachers. And the institution plans to additionally teach civic responsibility, world perspectives, and environmental sustainability.

The charter parent team has experienced executives to accomplish this. The setting in rural Los Altos Hills and the abundant ties to hands-on experiences in the local open spaces, parks, and pathways are a rare asset for this new school.

Further, I strongly feel that the Bullis Charter Elementary School will continue to perform a vital community function that the Bullis Elementary School has performed up until now. As the only public school in Los Altos Hills, Bullis acts as a hub that brings together the community's residents. Unfortunately, citing the budget crisis, the school district decided it had to close one of the seven elementary schools they maintain. More unfortunately, the school they chose to close was Bullis, the only remaining public school in the Los Altos Hills community – in the past 35 years, the two other public schools in Los Altos Hills have been closed. It is a testament to the critically important role Bullis plays in our community that the parents of students there, as well as many other residents of the community, have banded together to continue Bullis as a charter school.

As a long-time resident of Los Altos Hills, and as someone whose family has resided in Los Altos Hills since its inception (and before), I have seen that a local school plays a significant role in bringing the community together and fostering civic engagement – not only with respect to education but for many other areas of concern to the community as well. I strongly believe that it is important that the Bullis Charter Elementary School continue to play this function in our community.

I hope you will join me in support of this new community treasure.

Sincerely



Kim Cranston



May 15, 2003

To Whom It May Concern:

I write to urge your support of the Bullis Charter School and to bring your attention to this April 3, 2003 unanimous resolution of the Los Altos Hills City Council:

A RESOLUTION OF THE CITY COUNCIL OF THE TOWN OF LOS ALTOS HILLS  
SUPPORTING PUBLIC EDUCATION IN LOS ALTOS HILLS AND THE BULLIS  
CHARTER SCHOOL

WHEREAS, public education is a vital element of any town; and

WHEREAS, the closing of Bullis-Purissima Elementary School in June 2003 will leave Los Altos Hills without a single public school when the Town once had four public schools; and

WHEREAS, Los Altos Hills will soon be the only town on the Peninsula without a single public school; and

WHEREAS, the development of a charter elementary school open to all in Los Altos Hills is in the best interest of our Town and our residents, children, parents and homeowners;

NOW, THEREFORE BE IT RESOLVED: that the City Council of the Town of Los Altos Hills acknowledges that the Town's General Plan identifies public education as the designated land use of the Bullis-Purissima Elementary site;

AND, BE IT FURTHER RESOLVED: that the City Council of the Town of Los Altos Hills supports the plan for developing a public elementary school in Los Altos Hills as allowed under the State Education Code;

AND, BE IT FURTHER RESOLVED: that the City Council of the Town of Los Altos Hills specifically supports the efforts of the Bullis Charter School to keep public education in Los Altos Hills and recommends to the 7-11 Advisory Committee to the Los Altos School District that it give top priority for use of Bullis-Purissima Elementary School site and facilities on Fremont Road to the Bullis Charter School.

Thank you



Breene Kerr  
Los Altos Hills Town Council Member  
[Breene@BKP.com](mailto:Breene@BKP.com)  
(650) 302-9376

**RESOLUTION NO. 25-03**

**A RESOLUTION OF THE CITY COUNCIL OF THE  
TOWN OF LOS ALTOS HILLS  
SUPPORTING PUBLIC EDUCATION IN LOS ALTOS HILLS  
AND THE BULLIS CHARTER SCHOOL**

**WHEREAS**, public education is a vital element of any town; and

**WHEREAS**, the closing of Bullis-Purissima Elementary School in June 2003 will leave Los Altos Hills without a single public school when the Town once had four public schools; and

**WHEREAS**, Los Altos Hills will soon be the only town on the Peninsula without a single public school;


**WHEREAS**, the development of a charter elementary school open to all in Los Altos Hills is in the best interest of our Town and our residents, children, parents and homeowners;


**NOW, THEREFORE BE IT RESOLVED:** that the City Council of the Town of Los Altos Hills acknowledges that the Town's General Plan identifies public education as the designated land use of the Bullis-Purissima Elementary site;

**AND, BE IT FURTHER RESOLVED:** that the City Council of the Town of Los Altos Hills supports the plan for developing a public elementary school in Los Altos Hills as allowed under the State Education Code;

**AND, BE IT FURTHER RESOLVED:** that the City Council of the Town of Los Altos Hills specifically supports the efforts of the Bullis Charter School to keep public education in Los Altos Hills and recommends to the 7-11 Site Advisory Committee to the Los Altos School District that it give top priority for use of Bullis-Purissima Elementary School site and facilities on Fremont Road to the Bullis Charter School.

**PASSED AND ADOPTED** this 17<sup>th</sup> day of April, 2003.

  
\_\_\_\_\_  
City Clerk

By   
\_\_\_\_\_  
Mayor

**QUESTIONS FROM  
LASD BOARD OF TRUSTEES  
AND  
BULLIS CHARTER SCHOOL RESPONSES**

Member Jay Thomas

The School Board is required to look at charter school applications without regard to available space.

Is this charter application "without regard to any specific available space," or is the application tied directly to a specific space or site selection criteria? If associated with a specific space or site selection criteria, please justify.

The Bullis-Purissima site is an ideal location in Los Altos Hills for a neighborhood elementary school with the appropriate classroom buildings, multi-purpose rooms, offices and faculty lounge and playground space. However, the petitioners are open to other sites in Los Altos Hills that are adequate for an elementary school of the size range anticipated.

You as the Los Altos School District Board of Trustees have declared the Bullis-Purissima site as "surplus property" and thus could make it available to the Bullis Charter School. Although you have declared that no district-run elementary school will be operating there, it is an independent decision whether you allow a charter school to use the surplus property. If you have already decided not to allow the Bullis Charter School to use it, the petitioners are unaware of when the Board met and took action in a Brown Act compliant meeting.

Can you please tell me how the curriculum focus of the Charter School differs from, or further enhances the curriculum already provided by the Los Altos Elementary School District?

The BSC program will have high academic standards similar to Los Altos and other school districts that serve a similar population and with high API scores. In addition, BCS will provide enriched learning academic opportunities to the core academic areas as well as add other content areas such as foreign language. BCS will make use of the surrounding environment and eco-system to integrate and expand the academic program in a hands-on approach to learning. The exploration of a variety of topics will take place in the extended school-day program.

The core curriculum of Bullis Charter is based upon the Los Altos School District curriculum as stated in the charter document. The education of the students will be enhanced in the following ways:

1. They will be taught in a neighborhood school where they will learn in close proximity to their parents and neighbors. The reason neighborhood elementary schools are so popular throughout California is due to the perception that keeping younger students closer to home enhances parental involvement and provides a nexus of teacher/parent/student interaction so important to early education.
2. The Los Altos Hills location will allow for a focus upon the local, rural setting in terms of teaching as well as field trips.

The Board is supposed to take a positive view of how the Charter will benefit all children in the district. Can you please tell me the positive reasons for the segregated, or stepped, acceptance policy for children who reside within the district that is based on address and city of residence?

The charter school must allow all residents of California to enroll and must not determine enrollment due to the child or his parent's place of residence unless the number of pupils who wish to attend the charter school exceeds the school's capacity. In such case, a public random drawing must be held. Preferences in the lottery must be extended to pupils who reside in the District and other preferences may be given as long as they are not inconsistent with any other provision of law and are approved by the District (within the charter).

The Board is required to certify the financial viability of the Charter. Can you please provide what is the minimum dollar amount, on a per-student basis, that you require to operate the school? How much of that amount, again on a per-student basis, is above the anticipated annual (not one-time) state funding?

The Petitioners pledge that the Bullis Charter School will be a financially secure school and that the expenses per student will be within the revenues per student. The Charter School will rely on three major sources of funding: state revenues, state and private grants and donations. The Petitioners have successfully garnered both one-time and on-going donors who pledge to provide financial support for the School. The level of support included in the School's Multi-Year Strategic Fiscal Plan is comparable to the historical support that the Bullis community has made in previous years on a per student basis. Approximately 75% to 80% of revenue is estimated to be derived from state sources with the remaining 20% to 25% from local sources, including grants.

Similar to the challenges faced by the Los Altos School District, the Charter School revenue projections for state funding are based upon estimates, estimates that are subject to change and flux primarily because of the economic condition of the state. Uncertainly about multiple aspects of state support, including categorical funding per student, basic aid funding augmentation, and the very basic per student funding allocation for 2003-2004 are the fact of life relative to funding for California public education.

The expenditure per student in the first year of operation is higher than the expenditure per student for future years as the Charter School has included a modest school population of 155 for the first year with that population growing to 310 in future years. The budget model provides for an average expenditure per student of approximately \$7,700 over the five year period. The annual amounts range from \$7,100 to \$8,200. With the multi-year strategic plan, the Charter School has the ability to carefully monitor and manage its budget profile and has the ability to modify its spending plan if, when or as any of the major budget variables change - either up or down. Thus, the School will be able to reduce its expenditures if the projected revenues do not materialize as projected.

There is a single one-time budget projection item, that of the state start-up grant for Charter Schools which is actually 'flow through' funding from the federal government. The federal budget support has been reauthorized for California Charter Schools.

Per pupil funding from state

The per pupil revenue from the state is projected to come from the following programs: Block Grant and Categorical funds per student, plus other state programs including Class Size Reduction, Staff Development, Instructional and Library Material Funding and State Lottery. As stated earlier, the state funding is projected to provide approximately 75% of the School's funding. The funding profile is similar to that of the School District and to all other California public schools.

Incorporated into the School's Multi-Year Strategic Fiscal Plan is an Unappropriated Contingency Amount that is over and above the recommended Reserve Level for a School. The Amount set aside as a Designation for Economic Uncertainty is over and above the Unappropriated Contingency Amount in the budget plan. This Unappropriated Contingency ranges from \$250,000 to \$430,000 per year in each of the five years. The average Unappropriated Contingency per year is \$360,000. The Petitioners have consciously set aside this Contingency for start-up costs. As soon as the Petition is approved, the Petitioners hope to meet with the District to see if negotiations can proceed for the purchase of surplus equipment, instructional materials, textbooks and library items, etc. that will not longer be necessary for the District as a portion of the current school population migrates to the Charter School. If the District is unwilling to enter into such negotiations, the Petitioners have a comprehensive list of equipment, texts and instructional supplies that are recommended for acquisition for the opening of a new school. The Petitioners will also be requesting Proposition 39 support in accord with the intent and parameters of law.

2 Textbook \$\$\$\$

Petitioners have set aside a significant Unappropriated Contingency Amount for each of the five years. This Contingency ranges from \$250,000 to \$430,000 per year. If the Charter School is unable to successfully complete negotiations with the District for its surplus textbooks, the School has plans to acquire the textbooks and library collection from three primary alternative means: purchase surplus and new texts from warehouse, collaborate with librarian whose specialty is to review and evaluate school and public library collections being disposed for down-

sizing events, and/or involve community donations for library collection purchase and/or classroom textbook collection for 'naming' rights or recognition. Members of the community who have been long-standing supporters of Bullis School and the Education Foundation have pledged continued support for the Bullis Charter School.

In your presentation, you cited one reason for the Charter School is there are no public gathering areas in the Town of Los Altos Hills. Please explain why the Town of Los Altos Hills does not have any parks, community areas, or downtown areas.

The Bullis Charter School application is focused upon elementary school education. The value to Los Altos Hills is that it will be the only public school in the entire town and thus provide the unique nexus for parent/student/community interaction.

Member Margot Harrigan

Please specify what is innovative, unique or an improvement over the current Los Altos Elementary School District curriculum.

As indicated above, we are using the LASD curriculum as the starting point for the core "college prep" curriculum. The difference in the educational program includes (1) smaller school limited to 350 children (2) A Los Altos Hills-based school taking advantage of the neighborhood/town location and emphasizing the local field trips tied into local geography/ecology and town issues (3) smaller class size and (4) fully staffed PE, instrumental music and art. We will add to this program as the curriculum evolves and our Principal and teachers advice.

Please specify what you believe to be the per-pupil funding from the State and how that will be spent, especially as "peripheral" materials of a one-time nature are costly (such as library books, computers, staff room equipment).



Per-pupil funding is the ADA funding plus any state grants garnered such as the start-up or implementation grants for the first year. Peripheral materials will be funded from donations, private grants, and these two state grants. For example, the Bullis Charter School just received a generous furniture donation of desks, chairs, and other equipment from a local corporation.

Much of what the Charter School considers unique about its proposed curriculum (such as Los Altos Hills history and geography) is related to the Charter School being in a particular location. How will the curriculum change if that site is not available for the Charter School's use?

The curriculum will not change based on being in the primary location choice of Bullis-Purissima site or an alternative site.

Member David Casas

Can you explain why both the measurable student outcomes and the expected attendance rates stated in your petition are considerably lower than our school district's standards?

Our student outcomes and expected attendance rates goals are the same as the Districts' and based on the districts goals. We expect the BCS actual student outcomes and attendance will be as good as the Districts'.

Your school budget shows only \$56 per student for textbooks. How will you be able to implement a new curriculum, with all new textbooks, for that amount?

As mentioned in the response above the Petitioners have set aside a significant Unappropriated Contingency Amount for each of the five years. This Contingency ranges from \$250,000 to \$430,000 per year. If the Charter School is unable to successfully complete negotiations with the District for its surplus textbooks, the School has plans to acquire the textbooks and library collection from three primary alternative means: purchase surplus and new texts from warehouse, collaborate with librarian whose specialty is to review and evaluate school and public library collections being disposed for down-sizing

events, and/or involve community donations for library collection purchase and/or classroom textbook collection for 'naming' rights or recognition. Members of the community who have been long-standing supporters of Bullis School and the Education Foundation have pledged continued support for the Bullis Charter School.

Can you describe where you expect to recruit your teaching staff and what your plans are for getting them prepared to teach your new curriculum by September 2003?

Recruiting a highly qualified staff of credentialed, experienced teachers could not be more important. We have engaged a search firm to help recruit a top notch principal and, possibly, lead teachers. We will rely on our principal to create a hiring committee and process for the recruitment and selection of teachers. This process will include advertising, professional contacts, and again, possibly a search firm for the leadership positions on the faculty.

We will be recruiting fully credentialed teachers. Teachers must demonstrate a "match" between the vision and values of BCS.

Training will commence in early August with a two-week teacher institute. This institute will provide opportunities to share the possible diverse backgrounds of this new group, build on these backgrounds to create a new community of excited and dedicated professionals. At this institute, the teachers will plan extensively for the first few months of instruction; they need to plan for the entire year and to plan extensively for the first few months. In this planning period, the principal and teachers will be asked to identify their preferred method of grade level and cross grade level collaboration, identify their preferred method of annual performance review and measures of assessment; identify their preferences for professional development courses (both for recertification credits and for elective interest); and to identify the skills and unique talents of these individuals and how they can best contribute to the formation of a caring, dynamic school community.

How are you going to deal with differences in math achievement among your students?

There will be an emphasis in differentiated instruction in all curriculum areas. Teachers will receive training in how to work with children learning at different rates in all grades. Many other school districts in our area organize their classrooms and instruction in order to reach each and every student. As most LASD schools currently do, students change classrooms to work at their learning level. Again, following the LASD model, a math specialist can be brought in to teach transitional math to our most advanced math students in 6<sup>th</sup> grade.

Please explain the basis for the charter application's appropriation and use of the Bullis name for the charter school.

The charter organizers have an affectionate memory of the Bullis-Purissima school and site and wish to continue and build upon that memory. Since the LASD has declared the property surplus, we assumed the District will no longer be using the name for an operating school, but if we are mistaken, please inform us otherwise.

The charter presenters referred to the lack of recreational and other open space in the Town of Los Altos Hills. Have the petitioners approached the Town to inquire why the Town annually renews a lease addendum allowing the current tenant fence of the Pinewood property from the community?<sup>1</sup>

This is not a factor in the Charter approval Criteria.

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<sup>1</sup>/During the public hearing, Mr. Casas inadvertently referred to this as the "Eastbrook" property.

President Duane Roberts

During the presentation, several new educational programs were mentioned that were not in the Charter. Please provide the Board with a more detailed, and complete description of the planned educational program of the Charter, and provide the detailed costs of each educational program, and show how it is included in the Charter budget as presented.

This question is answered above in response to questions from several of the other Board members. Just as the Districts' own curriculum will evolve, so will ours over time. The evolution will be guided by our Principal and teachers as well as our Educational Advisors including Sharon Robison, a former Superintendent and nationally recognized educational expert. We are also pleased to announce that Deborah Stipek, Dean of Stanford School of Education, has joined the Bullis Charter School as an educational advisor. The quality of these two nationally recognized educational leaders is an indication of our ability to properly implement our educational program and evolve it as appropriate.

**BULLIS CHARTER SCHOOL  
RESPONSES TO DISTRICT FINDINGS**

**RESPONSE TO THE LOS ALTOS SCHOOL DISTRICT FINDINGS  
IN REGARD TO THE BULLIS CHARTER PETITION  
CONTAINED IN RESOLUTION 02/03-17**

**1. Petitioners are demonstrably unlikely to successfully implement the program described in the Petition**

**A. Lack of Program Focus**

First, it is unclear how the desire of the petitioners to locate at the former site of the Bullis Purrisima School would equate to lack of success. The BCS shall be open to all students in the State pursuant to Education Code Section 47605(d) and does not seek to retain the old attendance boundaries. BCS makes it clear in response to a question from Board member Jay Thomas that while the Bullis-Purissima site is ideal for BCS; BCS is looking at other Los Altos Hills sites that will fulfill its mission. Whether the district has an obligation to provide a facility to BCS is independent of the decision of the District to grant or deny the charter. The decision to grant or deny the charter is governed by Education Code Section 47605. The requirement of the District to provide a facility is found in Education Code Section 47614. The District confuses the two very separate issues.

As discussed in detail in the cover letter, the BCS charter has proposed several unique features, which together make up an innovative educational program for children in the State. BCS also made it clear to the District that it is working with educational experts of the highest caliber such as Dr. Sharon Robison, who is a former California public school superintendent. It is clear that the District did not review Dr. Robison's credentials or her work on the project before unilaterally determining that she would not be capable of implementing the Districts' core curriculum with the added features of the BCS.

**B. Lack of Sufficient Planning Time**

BCS has contracted with experts throughout the state to ensure readiness for operation despite the shortened time frame that was left after the District's late decision in February to close the Bullis Purrisima Elementary School. BCS contracted with Spector, Middleton, Young & Minney in Sacramento for representation with regard to charter school law. That firm represents over 150 of the charter schools in the state. BCS contracted with CASA, for expertise in school finance. CASA is run by Kathy Vogel, former CFO of San Francisco Unified School District. Finally, BCS contracted with Sharon Robison, ex-Superintendent \_\_\_\_\_ School District for assistance in curriculum development and educational planning. The remaining items of staffing and school site finalization were left purposely until the charter was approved to avoid having to break any commitments in case of denial. If the District had been sincere in trying to improve the chances of BCS success it could have met with us

*discussions  
between SD & Charter  
MOU  
never happened.*

*Conversion  
Charter  
for collected,  
or this  
Washington*

*no  
any thing  
given.*

to discuss details and could have approved the charter subject to BCS hiring teachers and acquiring a site.

**C. Lack of Familiarity with Legal Requirements**

First the District argues again that BCS does not have a right to the Bullis-Purissima site. The issues surrounding future obligations of the District to provide facilities to charter school students are separate from the District's legal obligation to approve a charter under Education Code Section 47605 and are not at issue here. The District could choose to give the site BCS, or BCS could rent it, or use another site. All are possible after the issuance of the charter. The charter is NOT premised on the ability of the petitioners to use the Bullis-Purissima site. Again the District purposely ignored the BCS answers to District questions they had in their possession prior to issuing these "factual findings".

The BCS is open to all students in the State of California in accordance with Education Code Section 47605(d). The enrollment preferences are consistent with the Education Code and will not be implemented in a discriminatory fashion. All residents of the District are eligible to attend and in fact are given an enrollment preference in the charter. A preference for families who have volunteered an enormous amount of hours in the development of the School is a typical provision in charters throughout the state, and encourages parents to be stakeholders in their children's education, consistent with the intent of the Charter Schools Act. The advantage of this program is that it allows anyone, regardless of residence, to increase the chances of admission.

Despite the findings of the District, the BCS Charter By-Laws grants one Board seat to a District representative.

**D. Unrealistic Financial/Operational Plan**

First, as is clearly stated in the charter documents, the budget is not part of the BCS charter but an indication of our current budget assumptions and a demonstration of our knowledge of the complexity of school financing. Our draft budget was developed in concert with Kathi Vogel, the former Chief Financial Officer of the San Francisco School District. Once the charter is approved and we hire a Principal, we can refine the budget based on new information on revenue from the state, funds available from the Bullis Foundation a non-profit foundation formed to raise money to support the School and costs assumptions versus detailed actual costs such as facilities costs.

1. Financial

Due to the hostile environment adopted by the school district we were reluctant to publish the names of our supporting families as they may be at risk of retribution. We can report that we have received cash donations

from dozens of individual donors. Additionally, we have three donors who have made specific pledges to fund the cost of the library, the computer lab and textbooks. Documentation of these pledges can be made available upon request.

Our budget was clearly marked DRAFT to handle specific findings such as this. We assumed that there would be a number of unknown items for us and built in contingencies. The budget will undergo many more drafts before a final one is adopted by the Board of Directors. Many of the Board members such as Craig Jones, Stan Mok, Mark Breier, and Diana Neiman have extensive experience reviewing budgets and going through the iterative process with executives on refining the budget. After this charter is allowed, we intend to hire a Principal and refine the budget based on enrollment, state funding levels, specific cost items such as rent, actual faculty salaries, etc.

As for grants and cash flow in the first year, we have recently prepared our application for the State Start Up Grant. As part of the application process we have addressed the issue of the timing of the grant funds. In addition we have applied for grants from private foundations to help fund our start up expenses and we have pledges of significant support to cover the hiring of our principal. Other parents have indicated their willingness to make interest-free loans to the school, to cover any timing differences associated with the flow of funds.

As for staffing levels for extra-curricular classes, we are committed first and foremost to the core District curriculum and will add extra curricula as funding allows. We will fund smaller class sizes as a first priority, but "fully staffing" extra curricular classes shall be determined as fundraising allows.

As for instructional materials, we initially hoped that we would be negotiating with the school district in good faith to use existing school materials at a nominal cost. Our revised budget includes sufficient funds to cover these expenses. Given the District's unwillingness, we are fortunate enough to have donors who have indicated their willingness to underwrite the cost of the library, computer lab, textbooks and other essential materials.

The petitioners planned to outsource student attendance accounting to the District if the District's services were available. If not, BCS will hire CASA (California Administrative Services Authority) to do student attendance accounting or to handled it internally.

As for professional development, our curriculum development advisor, Dr. Robison, has created a suggested development plan for our new teachers.



Expenses for this are well covered by the significant contingency included in the draft budget. We expect that we will have a two-week professional development program prior to the commencement of classes.

We disagree with the District on facility costs and equipment costs. We have reviewed several potential sites within Los Altos Hills and some are already largely equipped with much of what we need and asked our parent volunteers to donate many of the missing items. In addition to the library books, computers and textbooks mentioned earlier, we have received a large donation of office furniture, desks and chairs.

As for the Chief Personnel Officer and Chief Business Officer, these positions are placeholders that describe specific activities and functions required in any school. We anticipate that the Principal will handle the duties of the Chief Personnel Officer and will supervise either an internal business officer or an outside services provider of business services. We also anticipate that the Governance Board will form a business advisory committee to assist the Principal and School Board in these matters. Ultimate responsibility will lie with the Governance Board and the Principal.

As for reductions in state spending, as stated in the budget petition, the numbers were valid as of 2/25/03. The Governor did not publish his budget until mid May and this was substantially different from his earlier proposals. We will continue to revise our budget in accordance with published information.

As for interest income, all private donations will be made to the Bullis Purissima Elementary School Foundation and all interest that accrues to the Foundation will reside there. All contributions from the Foundation to the School will be recorded on the donation line rather than on the interest line. In the early years we hope to build an endowment that substantially exceeds the donations to the school to ensure the financial viability of the school for years to come.

As for healthcare cost increases, we doubt the Districts' crystal ball is any better than ours. We will reset the budget each year based upon actual information on how each line item cost of living increase is greater or lesser than the expected average.

## 2. Facilities

The District repeats yet again the false and misleading arguments concerning the site, attempting to confuse the issue of charter approval and site obligations. This charter request is to be granted by the appropriate

governing body, without prejudice as to the potential future District obligations to provide a site.

3. Lack of Necessary Expertise

The District is claiming that Sharon Robison, Kathi Vogel, the Dean of Stanford's Department of Education, and Spector, Middleton, Young and Minney, are not sufficient experts to help with the establishment of a single elementary school. We have not yet hired a principal and when we do, the details of the program will be elaborated. The District's arguments assume every charter can pay for and develop all the details of a school, including down to the detail of lesson plans, before getting legal approval for a charter. Such a burden would render charter schools virtually impossible to create, since the funds for such a program can generally not be raised prior to knowing whether the legal permission has been granted for creation of the school. This anti-charter position of the District should not be endorsed by the County.

2. **Affirmation of each of the conditions described in subdivision (d)**

The admission preferences are in accordance with Education Code Section 47605(d). A preference is given to District students and none of the other preferences discriminate against any protected class. The District never allowed any discussion on this issue and we are open to modify the preferences if they differ from any reasonable interpretation of State Law. As stated in the charter, BCS is non-sectarian, will not charge tuition, and shall not discriminate.

3. **Comprehensive description of all of the required elements**

A. **Educational program**

1. Mission Statement

The educational mission of the Charter School is to provide a great education to children in the State of California by providing an alternative choice for parents and students run by the alternative governance in a small school setting with smaller class sizes in a rural setting taking advantage of the Los Altos Hills natural environment. This makes the school distinctive from any offering of the District.

The Vision Statement of BCS is as follows:

"Bullis Charter School offers a collaborative, experiential learning environment that emphasizes individual student achievement and inspires children, faculty and staff to reach beyond themselves to achieve full potential. Using a

global perspective to teach about the interconnectedness of communities and their environments, the BCS program nurtures mutual respect, civic responsibility, and a lifetime love of learning.”

*Collaborative:* BCS will build collaborative relationships both inside and outside the classroom. Inside the class, teachers will leverage the learning opportunities students’ gain through working with others (adults and peers) to develop their potential for building knowledge and skills. Outside the classroom, a strong school community will be paramount to the framework of the charter school. We expect our small school community to promote collaborative relationships among all community members. Professional development for faculty will be available both in the format of a two-week pre-session teacher institute, as well as on an on-going basis. Opportunities for on-going collaboration at grade level, across grade levels, and with other professionals in the Bay Area will be provided. We are working to develop links to the local parks and recreation departments to offer adult education programs, on-site after-school learning opportunities and any additional programs that encourage collaboration at BCS. In their efforts to create Bullis Charter School, parents have already exhibited their outstanding level of commitment. In a small school community, parents are stakeholders who will be more likely to take part in classroom work, parent education and school governance.

*Experiential learning environment:* Research shows again and again that children learn best by doing and showing. Teachers will seek opportunities to link classroom learning to everyday life through such activities as: hands-on projects, role playing, debates, current events scrap books, demonstrations, field trips, speakers and classroom visitors.

*Individualized student achievement:* BCS plans to tap into a growing movement that uses differentiated instruction to ensure that each and every child in the classroom has goals and assessments to show individual achievement and learning. Enabling this paradigm shift from teaching one lesson to all, to facilitating learning for each student, will require ongoing professional development and active involvement of parent volunteers in the classroom. It is an exciting shift from the factory model of learning to pedagogy of relationships.

*Reach beyond themselves to achieve full potential:* A dialogic approach to teaching and the formation of a constructivist classroom (where students and teachers co-construct knowledge) will give voice to each and every child. Experiential learning opportunities that allow children to manipulate, experiment and draw their own conclusions will naturally engage our students. Individual student achievement plans and

assessments, differentiated instruction, and teaching to the whole child are all modalities we will work towards. Learning will be tied to meaningful, measurable outcomes. In addition to standardized tests, local measures of learning, such as portfolios, student demonstrations and anecdotal records, will be utilized. Our small class sizes (K-3, 20; 4-6, 25) will allow for a variety of teaching innovations. Teachers will be offered specialized training to take advantage of the many possibilities and opportunities smaller class sizes present. We will challenge our teachers to look for ways to create interdisciplinary lesson plans and to incorporate the performing and fine arts into their curriculum. We will model and encourage action research to address challenges in the classroom and promote an attitude of learning from asking questions, exploring possible answers, and evaluating assumptions. In addition, teachers will be encouraged to explore and pursue the National Certification Program.

*Global perspective:* BCS assumes that our community is but one small community in an interconnected system of world communities. Faculty will teach systems thinking both in the classroom, thru academic disciplines of social studies and language arts, as well as on the playground thru conflict mediation and life skills programs. Bullis School's diverse cultural profile provides numerous opportunities to bring the world into the classroom.

*Interconnectedness of communities and their environments:* The local rural environment both on campus and in local Los Altos Hills open spaces will provide students with experiential opportunities to learn about the environment. Students will have the opportunity to clean up creek systems, maintain local nature trails and develop gardens. Fieldwork could include the study of habitats, ecosystems, and agriculture. Coupled with systems thinking, students will begin to appreciate how pollution in our local creek affects the health of the San Francisco Bay, as well as the livelihoods of fishermen and international tourism.

*Mutual respect and civic responsibility:* As a charter school we have a unique opportunity to limit school size and class size to best promote a sense of community. Community is an exciting concept to build upon, for it is a fundamental desire that all of our children grow to become positive members of the global community. We can influence this outcome by promoting a sense of service and responsibility to the community; classroom jobs, campus beautification projects and a variety of community service activities will be encouraged. Opportunities to participate in school governance will encourage the expression of voice, critical thinking, and the importance of participating in the democratic process.

*A lifelong love of learning:* A love of learning is best fostered by nurturing a culture of exploration both inside and outside the classroom.

A child-centered approach to learning, where each child's individual interests are identified and challenged, will naturally engage students and encourage an on-going love of learning that will transcend the classroom experience. Adults in the community will be expected to challenge their knowledge and skills on an ongoing basis through professional development and action research, and to teach others what they have learned. We are excited about this unique opportunity to create a community of learners, where participants come together to explore, learn and innovate. Our ideas are merely a springboard for what Bullis Charter School will become.

2. The District asserts that BCS could not possibly implement their impossibly complex curriculum. The curriculum of the District is state of the art and provides a good starting point for the core curriculum, but is hardly unique. We could have chosen other good starting points such as Palo Alto or Cupertino, but chose Los Altos because it would provide continuity for the students and ensure that as they matriculate to the District-run Middle School if they have studied similar materials as the District-run schools. This curriculum is outlined in the materials attached to the charter and can be implemented by a qualified principal, working with faculty, and in consultation with our educational experts. All of the more detailed materials are part of the public record and available at District headquarters.
3. The Districts argues that school size and class size do not matter. We beg to differ. The District says location does not matter. We disagree. The District says a neighborhood school does not matter or may not be relevant to all. We disagree. Again, BCS is aware that it must enroll all State residents who wish to attend, and these students will be welcomed into our neighborhood school.
4. All four areas of state standards are covered in the District core curriculum referenced in the charter and the course subjects are listed.
5. The charter indicates that BCS will adopt policies and procedures for identifying and serving ELL students, including the home language survey, CELDT testing, properly certified staff and specialized assistance.
6. We are committed to a negotiated solution on Special Education with the District. We understand our responsibilities under the law as a public school of the District, but it would appear that the District does not understand its ultimate responsibility under the law to ensure that the needs of special education students are met in accordance with the law.

**B. Measurable Pupil Outcomes**

The school objectives are the same as the District in terms of API and STAR assessment measurement as well as mastery of curriculum as demonstrated by passing grades in each subject as determined by the review of teacher-initiated and drafted exams and assignments and personal observations by teachers. BCS purposely set its goals to mirror those of the District to ensure continuity for students.

**C. Methods for Measuring Pupil Outcomes**

The standard methods for measuring outcomes, including parent-teacher conferences, report cards and reporting on state test scores will be implemented. BCS will provide an annual performance report and school accountability report card to collect and analyze data.

**D. District Representative**

Again, the BCS bylaws provides for a representative from the District.

**E. Qualifications of Employees**

The Charter gives a detailed account of the minimum requirements for the Principal as well as the teachers.

**F. Health and Safety Procedures**

The District's Health and Safety plan is adopted in the Charter. BCS is committed to implementing the health and safety standards in the Districts Health and Safety plan, which is part of the public record. Implementation will be the responsibility of the Principal. Additional charter specific policies and procedures will be adopted by BCS prior to the operation of the school and later on an as-needed basis.

**G. Admission Preferences**

Education Code Section 47605(d) requires that a preference be given to District residents, but also allows for additional non-discriminatory preferences. The Education Code does not require a priority order of preferences.

**H. Audits**

BCS is committed to having its Board of Directors select an independent auditor with experience in school finance and to having its audit completed in accordance with GAAP as applied to public schools. With a public school experienced

Principal and with consultants such as Cathi Vogel, we do not anticipate any problems here. Craig Jones, Board Chairman, has served on many audit committees of Boards of Directors and is familiar with Board responsibilities in this regard.

**I. Student Suspension or Expulsion**

The Charter provides detailed information on the suspension and expulsion practices it expects to use.

**ADDITIONAL INFORMATION  
DEVELOPED BY BCS AS RELATES TO  
THE OPERATION OF THE SCHOOL**



**BULLIS CHARTER SCHOOL PROPOSED  
CURRICULUM AND PEDAGOGY**

# BULLIS CHARTER SCHOOL PROPOSED CURRICULUM AND PEDAGOGY

1. VISION STATEMENT
2. STATEMENT OF PEDAGOGY
3. PROPOSED IMPLEMENTATION OF CURRICULUM
4. PROPOSED CURRICULUM MATERIALS AND ASSESSMENTS

## 1. VISION STATEMENT

*Bullis Charter School offers a collaborative, experiential learning environment that emphasizes individual student achievement and inspires children, faculty and staff to reach beyond themselves to achieve full potential. Using a global perspective to teach about the interconnectedness of communities and their environments, the BCS program nurtures mutual respect, civic responsibility, and a lifelong love of learning.*

*Collaborative:* BCS will build collaborative relationships both inside and outside the classroom. Inside the class, teachers will leverage the learning opportunities students gain through working with others (adults and peers) to develop their potential for building knowledge and skills. Outside the classroom, a strong school community will be paramount to the framework of the charter school. We expect our small school community to promote collaborative relationships among all community members. Professional development for faculty will be available both in the format of a two-week pre-session teacher institute, as well as on an on-going basis. Opportunities for on-going collaboration at grade level, across grade levels, and with other professionals in the Bay Area will be provided. We are working to develop links to the local parks and recreation departments to offer adult education programs, on-site after-school learning opportunities and any additional programs that encourage collaboration at BCS. In their efforts to create Bullis Charter School, parents have already exhibited their outstanding level of commitment. In a small school community, parents will be more likely to take part in classroom work, parent education and school governance.

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## 2. STATEMENT OF PEDAGOGY

In the spirit of the BCS Vision Statement, BCS principal, faculty and staff will be encouraged to pursue a "pedagogy of relationships." Research supports that learning best occurs when teachers and individual students connect on a personal level and when students and teachers build knowledge together and work from a base of shared expectations and understanding. The BCS pedagogy assumes that teachers are continuous learners themselves, and work in a cycle of inquiry in developing their practice. This cycle of inquiry revolves around identifying measures of success and progress (for themselves and their students), building assessments of those measures, and changing practice to reflect the outcomes of those assessments. The BCS founders also believe in linking learning to life in experiential learning activities, and in linking discipline areas through interdisciplinary teaching webs and projects.

## 3. PROPOSED PLAN FOR IMPLEMENTATION OF CURRICULUM

Implementation of curriculum refers to four primary activities: explicit understanding of state content standards and development of meaningful local standards; selection of materials based on state and local content standards; training of teachers in curriculum and desired outcomes for learning; identification of appropriate assessment tools for measuring success in learning outcomes and instructional effectiveness. *While the BCS founding group can outline a plan for curriculum, we expect our principal and teachers, when hired in coming months, to fully engage in a rigorous process of curriculum development. One of greatest advantages of the Charter is to let site teachers build their own program with materials of their choice, based on the following guiding principles:*

- a. Review of state and local content standards.
  - i. As a new school, Bullis Charter School has the luxury of aligning content, materials, professional development and assessments concurrent with the opening of the school. The state content standards will be used as a foundation for learning at BCS. BCS has a copy of these standards, and will take advantage of the generous resources provided on the California Department of Education website: [www.cde.ca.gov/standards](http://www.cde.ca.gov/standards).
  - ii. In addition, as the BCS Vision Statement reflects, the program intends to emphasize environmental studies and learning opportunities; civic responsibility; individualized student achievement; and systems thinking. The principal and faculty will identify the content standards in these areas; research materials to support instruction; develop appropriate local assessments and professional development; and implement a review process to support the development of curriculum as a dynamic activity.
- b. Selection and acquisition of curriculum materials.
  - i. Initially, BCS intends to use the Los Altos School District materials as a foundation and/or reference point for the curriculum. Materials will be evaluated and adapted informally on an ongoing basis and as needed. Materials will be formally reviewed at the end of every year. Once the

Charter is granted and the principal is on board, a formal process can be implemented for cyclical reviews and acquisition of materials.

- ii. All publishers of current Los Altos School District materials have been contacted and are sending sample materials. As of June 1, 2003, publishers have indicated a one week lead time for ordering materials needed for each grade level (based on a small order – 300 students schoolwide/avg 40 students per grade.).
- c. Training/professional development of teachers.
  - i. The BCS Board will recommend to the principal and to the BCS Foundation to run a Teacher Institute prior to opening. This time will be used for:
    - 1. Creating/building community, culture, and relationships based on a shared vision statement.
    - 2. Planning the curriculum: in addition to weaving together content standards, materials and resources, BCS faculty will review options for theme units, cross-grade level projects; interdisciplinary webs, and extracurricular enrichment opportunities.
    - 3. Sharing of materials: Each teacher will be expected to bring their “best practices” experiences and materials to the institute to begin to compile a shared BCS best practices knowledge and data base.
    - 4. Planning teacher in-service days and brainstorming other professional development opportunities. In addition, every teacher will be encouraged to attend professional conferences in areas of interest, and to teach their colleagues what they have learned.
    - 5. Identifying mentors in surrounding districts and school who would be willing to help guide our teachers.
  - ii. BCS faculty will be encouraged to explore a membership offer to the Mid-Peninsula Teachers Institute, a teacher-run professional development network, founded by teachers to encourage development in the areas of curriculum, instructional strategies, and reflective practice.
- d. Assessments.
  - i. In addition to the required state assessments, teachers will be asked to develop meaningful site assessments to measure
    - 1. different modalities of learning

2. site-based content standards
- ii. Teachers will be trained to disaggregate data in different ways to better understand
  1. individual student strengths and weaknesses
  2. effective instructional practices
- iii. Teachers will also receive training in how to change practice based on assessment data.

#### 4. PROPOSED CURRICULUM MATERIALS

All curriculum materials are/will be selected and implemented in alignment with State Content Standards. The following specific materials are currently used in the Los Altos School District curriculum, and will be used as resources for the foundation of the BCS program:

READING	Gr.	MATHEMATICS	Gr.	SCIENCE	Gr.
Houghton Mifflin Student Workbooks	K	Addison Wesley Explorations (1)	K	CSIN Science Programs: Earth and physical science	K
Sadler-Oxford Phonics	K	Baretta-Lorton Math Their Way	K-1	Geology, Magnetism, Plants and Animals – Their Needs	1
Creative Teaching Press	K	SRA Math Explorations and Applications (1-6)	1-6	Water, Land and Air Interact; Energy Exits in Many Forms; Life Cycles	2
Silver Burdett & Wright Group decodable Books	K	CSL Math Coach (1-6)	1-6	The Solar System; Motion: Simple Machines; Environments/Structures	3
Lippincott Phonics Easy Readers	K	Creative Publications: the Problem Solver (1-6)	1-6	Geology; Electricity/ Magnetism; Body Systems	4
Linda-Mood Bell LIPS Program	K	McDougal, Littell: Gateways to Algebra and Mathematics: Concepts and Skills	6	Astronomy; What's the Matter?; Microworlds/Respiratory System	5
LASD CORE Literature	K-6				
McGraw Hill Spotlight on Literacy series	1,2,3				
Heath Reading Program	1 - 5				
Scott Foresman Reading FOCUS series	1, 2				
Language Arts: What we teach	1-4				
Daily Edit/ Daily language review	1 - 6				
Read, Write and Type Computer	2				
HBJ Language Series (5, 6, 7)	4-6				
Prentice Hall Reading/Literature	6				
				Oceanography, Ecosystems; The Circulatory System. Elementary Science Laboratory Program Field trips, of Environmental Education Volunteers	6

Social Studies	Gr.				
A Study of People and Places Now and Long Ago	K				
Local History: China Unit Our Nation's History: Family Unit	1, 2				
Mexico Unit	3				
Local History: Los Altos, Ohlones	4				
Our Nation's History: Meeting Famous Americans	1-6				
Rand McNally: The Classroom Atlas Program	3, 4				
Harcourt Brace: California	4				
Houghton Mifflin: American Will Be	5				
Nystrom: Mapping American History	5				
Nystrom: World Atlas --Geothemes	6				
Houghton Mifflin: Message of Ancient Days					



**SAMPLE CHECKLIST  
FOR OPENING THE SCHOOL**



















**REVISED SUMMARY  
FINANCIAL DOCUMENTS**

**Bullis Charter School  
Cash Flow Statement 2003-04**

Net Cash Position	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	Total
Revenues													
State Charter School Loan				50,000									50,000
Local Fund Raising		30,000	30,000	75,000	10,000	10,000	10,000	15,000	75,000	10,000	10,000	10,000	285,000
<b>Total Revenues</b>		<b>30,000</b>	<b>125,000</b>	<b>10,000</b>	<b>10,000</b>	<b>10,000</b>	<b>10,000</b>	<b>0</b>	<b>15,000</b>	<b>75,000</b>	<b>10,000</b>	<b>10,000</b>	<b>335,000</b>
Expenses													
Certificated													
Classified		10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	100,000
Employee Benefits		2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	24,000
Books and Supplies		17,000	15,000	5,000	1,000	1,000	3,000	1,000	1,000	12,075	30,000	30,000	72,075
Operating Costs										20,000	25,000	13,750	49,000
Capital Outlay													58,750
<b>Total Expenses</b>	<b>29,400</b>	<b>21,400</b>	<b>22,400</b>	<b>14,400</b>	<b>14,400</b>	<b>14,400</b>	<b>14,400</b>	<b>14,400</b>	<b>13,400</b>	<b>45,475</b>	<b>68,400</b>	<b>60,150</b>	<b>303,825</b>
Monthly Net Change	600	103,600	-12,400	-4,400	-14,400	600	61,600	-35,475	-58,400	-10,150			
<b>Net Cash Position</b>	<b>600</b>	<b>104,200</b>	<b>91,800</b>	<b>87,400</b>	<b>73,000</b>	<b>73,600</b>	<b>135,200</b>	<b>99,725</b>	<b>41,325</b>	<b>31,175</b>			

**Cash Flow Statement 2004-05**

Net Cash Position	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	Total
Revenues													
Block Grant													
In Lieu Tax Portion													
State Aid Portion		41,452	82,904	55,269	55,269	55,269	55,269	55,269	96,722	48,361	48,361	48,361	642,507
State Block Categorical													0
Class Size Reduction	1,832	3,665	2,443	2,443	2,443	2,443	2,443	4,276	2,138	2,138	2,138	2,138	30,540
Staff Development - Cert				17,691		2,183	1,455	51,523	0	0	0	1,811	72,480
Staff Development - Class						2,183	2,183	2,753	0	0	0	0	6,279
All Other State Revenues				90				113	0	0	0	0	258
State Charter School Loan							14,889	0	0	1,947	0	0	16,836
Federal Revenues					388		0	0	0	388	194	0	380,000
Local Fund Raising	50,000	50,000	10,000	48,700	64,500	0	0	0	27,900	27,900	0	0	279,000
All Other Revenues													
<b>Total Revenues</b>	<b>51,832</b>	<b>95,117</b>	<b>475,347</b>	<b>106,413</b>	<b>140,291</b>	<b>61,440</b>	<b>124,124</b>	<b>62,412</b>	<b>126,759</b>	<b>80,734</b>	<b>50,692</b>	<b>53,707</b>	<b>1,428,869</b>
Expenses													
Certificated													
Classified	0	15,000	61,887	61,887	61,887	61,887	61,887	61,887	61,887	61,887	61,887	61,887	633,867
Employee Benefits	10,000	10,000	11,052	11,052	11,052	11,052	11,052	11,052	11,052	11,052	11,052	11,052	130,520
Books and Supplies	2,400	6,400	19,588	19,588	19,588	19,588	19,588	19,588	19,588	19,588	19,588	19,588	204,677
Operating Costs	30,088	30,088	2,579	2,579	2,579	2,579	2,579	2,579	2,579	2,579	2,579	2,579	85,966
Capital Outlay	18,956	18,956	18,956	18,956	18,956	18,956	18,956	18,956	18,956	18,956	18,956	19,047	227,568
<b>Total Expenses</b>	<b>78,045</b>	<b>97,045</b>	<b>124,612</b>	<b>114,062</b>	<b>114,062</b>	<b>114,062</b>	<b>114,062</b>	<b>114,062</b>	<b>114,062</b>	<b>114,062</b>	<b>114,062</b>	<b>114,150</b>	<b>1,326,348</b>
Monthly Net Change	-26,212	-1,928	350,735	-7,649	26,229	-52,622	10,062	-51,651	12,697	-33,329	-63,370	-60,443	
<b>Net Cash Position</b>	<b>4,963</b>	<b>3,035</b>	<b>353,771</b>	<b>346,121</b>	<b>372,350</b>	<b>319,728</b>	<b>329,790</b>	<b>278,140</b>	<b>290,837</b>	<b>257,509</b>	<b>194,139</b>	<b>133,696</b>	

