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THE KINGS VALLEY SOLUTION TO PERS COSTS

As public employees, Oregon public school teachers and staff are required to contribute 6% of their pay to the State of Oregon's Public Employees Retirement System (PERS) to cover the costs their pension. In addition, the employing agency must match these contributions with a percentage of total payroll to contribute to the unfunded liabilities of the PERS system. Since 2010, the employer's contribution rates to these unfunded liabilities have risen from about 5% to well over 20%.

This rapid escalation of PERS contributions has put substantial pressure on the budgets of all public employers, including schools. This is especially true for charter schools which typically operate on only 80% of the per-student funding available to ordinary public schools. For some charter schools, this significant increase in PERS overhead would be enough to force the the school to lay off teachers or close.

This was the case for the Kings Valley Charter School. In early 2011, after PERS had announced a doubling of its employer contribution rate from about 5% to over 10%, it became clear that the school simply could not bear the extra cost, and would have to drastically reduce its operation, or even close. Fortunately, the relative autonomy afforded charter schools in managing their finances provided the opportunity for an alternate solution.

A nonprofit group called People Sustaining Kings Valley (PSKV) was formed comprised mostly of local Kings Valley residents and Kings Valley School staff. The school is now able to contract the recruiting, hiring, and paying of its teachers and staff to PSKV thus removing school employees from the public payroll. As private employees of PSKV, they are no longer required to participate in the State of Oregon's PERS pension program. PSKV provides an alternate pension program to its employees, and the school is able save approximately \$80,000 per year in matching PERS contributions.

Besides the obvious benefit of the considerable cost reductions, PSKV provides other advantages to the school, its staff, and the community:

- o PSKV automatically contributes 6% of the employee's salary to a 403b retirement plan, and the employee has the option to contribute an additional percentage of salary (or not) to the pension fund.
- o The employees have personal input on how their money is managed, and an adviser is available to address their specific financial concerns.
- o Employees can feel more secure in the 403b plan versus the growing uncertainty of the long term funding prospects of PERS.

- o Employees can also feel more secure about their jobs now that the school can maintain a sounder financial position.
- o The school has received considerable positive feedback from the teachers and staff regarding the new arrangement.
- o PSKV is an almost entirely local entity so its control and oversight remains within the community.

The school's contractual relationship with PSKV has withstood the initial challenges by PERS investigators and has been approved by the Attorney General. KVCS is now in the second year of successful operation in this configuration.

Please feel free to contact Charter Starters for more information.

NEW CHARTER STARTERS SERVICES

COMING SOON.....

Rapid Fire Assessment

An immediate evaluation of problematic areas in your school

A quick one shot assessment to outline problematic areas in your schools organizational structure, day to day operations, personnel policies, etc.

Renaissance Program

A comprehensive program to assess and revitalize your school.

What's right, What's wrong and What to do about it...Right Now

Board and Administration Development Workshop

Our workshop is dedicated to help your board, administration, and staff development through exercises, discussion, and interviews to bring out underlying dynamics, problematic areas, and planning for improvement.

Getting out from under PERS

How-to lectures, forms and follow up for school administrators who are looking to unburden their school from excessive PERS payments.

Look for a complete schedule of these new Charter Starter Services becoming available by the end of February.

OREGON CHARTER SCHOOLS IN THE NEWS

We provide recent newspaper articles and messages from around the state and from various national charter school organizations. Some links are time sensitive and will drop from the host website after a few days.

Charter schools withdraw applications from Portland Public Schools

http://www.oregonlive.com/portland/index.ssf/2012/11/charter_schools_withdraw_appli.html

State nixes charter school proposal

<http://www.currypilot.com/News/Local-News/State-nixes-charter-school-proposal>

Charter school embraces the arts

<http://portlandtribune.com/sp/68-news/124706-charter-school-embraces-the-arts>

Charter school agrees to close

<http://www.registerguard.com/web/news/cityregion/29194861-41/homesource-charter-bethel-district-deal.html.csp>

Oregon charter school founders accused in \$20 million racketeering lawsuit

http://www.oregonlive.com/education/index.ssf/2013/01/oregon_charter_school_founders.html

Medford district faces charter student payouts after oversight

<http://www.mailtribune.com/apps/pbcs.dll/article?AID=/20130109/NEWS/301090323>

Group eyes building for charter school

http://democratherald.com/news/local/group-eyes-building-for-charter-school/article_b9ea58ca-5af4-11e2-8ad8-0019bb2963f4.html

Community school buying its building

<http://portlandtribune.com/fgnt/36-news/126558-community-school-buying-its-building>

MITCH Charter School to address communication issues under interim director

http://www.oregonlive.com/tualatin/index.ssf/2013/01/mitch_charter_school_to_revamp.html

GRANT OPPORTUNITIES

Corporate & Miscellaneous Grant Opportunities

Title: 2013 *Unsung Heroes K-12 Education Award*

Source: ING

ING Unsung Heroes began in 1995 as a way for ING to demonstrate its commitment to the education community. Grants are given to K-12 educators utilizing new teaching methods and techniques that improve learning. Each year, educators submit applications for an ING Unsung Heroes grant by describing projects they have initiated or would like to pursue. Each project is judged on its:

- Innovative method
- Creativity
- Ability to positively influence the students

Each year, 100 finalists are selected to receive a \$2,000 grant, payable to both the winning teacher and his or her school. At least one grant is awarded in each of the 50 states, provided at least one qualified application was received from each state. Winners are selected by Scholarship America, a national non-profit educational support and student aid service organization.

Of the 100 finalists, three are selected for additional financial awards: \$25,000 for first place; \$10,000 for second place; and \$5,000 for third place. The top winners are selected by ING's Educators Advisory Board, consisting of six distinguished educators from across the United States

Eligibility: K-12 educators.

Award: \$25,000 (1st place), \$10,000 (2d place), \$5000 (3d place), \$2000 (100 finalists)

Deadline: April 30 ,2013.

Information:

<http://ing.us/about-ing/responsibility/childrens-education/ing-unsung-heroes/about-ing-unsung-heroes>

Title: Nike Employee Grant Fund

The Nike Employee Grant Fund was established at The Oregon Community Foundation in 2010. Through this fund, Nike employees will work with OCF to award \$500,000 per year to local nonprofits.

This is Nike's "backyard" program, engaging employees in aiding nonprofits in communities where local Nike employees live – Clackamas, Columbia, Multnomah, Washington and Yamhill counties in Oregon and Clark County in Washington. Grants will be one-year awards, generally between \$5,000 and \$20,000.

Most grants will be awarded through the lens of sport, for projects that use sport or physical activity to leverage other community benefits, but some grants will be awarded for projects that address broader family and children's issues.

Eligibility: nonprofits in Clackamas, Columbia, Multnomah, Washington, and Yamhill counties in Oregon, and Clark County in Washington.

Award: between \$5,000 and \$20,000.

Deadline: June 1, 2013. (twice yearly, June 1 and December 1).

Information: <http://www.oregoncf.org/receive/grants/grant-opportunities/nike/nike-default>

Program guidelines(.pdf): http://www.oregoncf.org/Templates/media/files/grants/nike_grant_guidelines.pdf

Title: Touching Lives Through Theatre Grants 2013-2014

Source: Pioneer Drama Service

Pioneer Drama Service is proud to offer Touching Lives Through Theatre™ Grants available for the upcoming 2013-14 school year. Because we believe so strongly in the power of theatre to make a difference in a student's life, we are awarding a total of \$5000 of grants in the form of Pioneer Drama credit to qualifying middle and high schools.

Our goal with these grants is to create and support school theatre programs, generating positive opportunities for students and giving them a place to shine. Theatre allows children to involve themselves in an experience that brings growth, maturity, teamwork and responsibility—qualities that are relevant to all aspects of life. A 2010 applicant summed this up quite eloquently:

"The theatre program at my school is one of the most important and beneficial aspects of the school... Students enter the stage apprehensive and shy and leave the stage with confidence, poise and grace. Whether students are destined for Broadway or the corporate world, no doubt about it, theatre has a positive influence on their lives."

Each grant is intended to help create a complete drama experience for students in a school and must be used to stage at least one theatrical production. Grants will range from \$100 to \$500 of credit at Pioneer Drama Service, which is to be used for production materials, royalty fees, texts, DVDs and makeup. Grant funds will be awarded by August 15, 2013 and must be spent in their entirety by June 15, 2014

Eligibility: accredited public or private schools that have a designated faculty member who sponsors their theatre program. Theatre programs must have a budget of \$500 or less annually. Schools with no prior drama program are also eligible.

Award: \$100-500 credit at Pioneer Drama Service.

Deadline: Applications accepted April 1-June 30, 2013.

Information: <http://www.touchinglivesthroughtheatregrants.com/>

Title: From Failure to Promise K-12 Educator's Grant for 2013

Source: Dr. Cleamon Moorer

In "From Failure to Promise," author Dr. Cleamon Moorer describes his experiences, from flunking out of college to becoming an engineer, consultant, and a university professor. He is now awarding \$1,000 to a community-based organization, library, or school that uses the

tenets of his book to motivate, energize, and catapult K-12 students to reach their full potential in literacy, math, science, or technology.

Please note: Teachers are not required to purchase a book. In most circumstances, a review copy will be provided upon request.

Eligibility: K-12 educators and leaders of youth groups are encouraged to apply.

Award: \$1000.

Deadline: July 31, 2013.

Information: <http://www.fromfailuretopromise.com/K-12--Educator-s-Literacy-Grant.html>

Foundation Grant Opportunities

Title: *Toshiba America Foundation Science and Math Grants*

The Toshiba America Foundation (TAF) gives up to and over \$5,000 to math and science teachers in public and private schools. Funds will be given to teachers who engage students in positive and challenging learning experiences. Past successful grantees used the students' natural curiosity and enabled them to frame their own scientific questions.

Toshiba America Foundation grants fund the projects ideas and materials teachers need to innovate in their math and science classrooms. TAF is interested in funding projects designed by teachers or small teams of teachers for use in their own schools.

Two types of grants are awarded: middle and high school application (Grades 6-12), and elementary school (Grades K-5).

Eligibility: public and nonprofit private schools throughout the United States.

General Information: <http://www.toshiba.com/taf/about.jsp>

For grades 6-12

Award: rolling ,up to \$5000, twice yearly, over \$5000

Deadline: over \$5000 twice yearly, February 1 and August 1.

Information: <http://www.toshiba.com/taf/612.jsp>

Application: http://www.toshiba.com/taf/612_apply.jsp

For grades K-5

Award: up to \$1000

Deadline: once a year on October 1

Information: <http://www.toshiba.com/taf/k5.jsp>

Application: http://www.toshiba.com/taf/k5_apply.jsp

Title: *Captain Planet Foundation Grants*

The Captain Planet Foundation (CPF) annually funds projects involving children and young adults that promote understanding of environmental issues. These projects must include children and young adults aged 6-18 and focus on hands-on involvement, interaction and cooperation within the group, development of planning and problem solving skills, and adult supervision.

Eligibility: Schools and nonprofit organizations.

Award: \$250-2500.

Deadline: February 28, 2013. (Twice yearly, February 28, September 30).

Information: <http://captainplanetfoundation.org/apply-for-grants/>

Title: Lemelson-MIT InvenTeams

The InvenTeam initiative, created by the Lemelson-MIT Program, offers an unparalleled opportunity for high school students to cultivate their creativity and experience invention.

InvenTeams are teams of high school students, teachers, and mentors that receive grants up to \$10,000 each to invent technological solutions to real-world problems. Each InvenTeam chooses its own problem to solve.

InvenTeam students rely on inquiry and hands-on problem solving as they apply lessons from science, technology, engineering, and math (STEM) to develop invention prototypes. Interactive, self-directed learning coupled with STEM curricula are essential for experiencing invention.

Students learn to work in teams, while collaborating with intended users of their inventions. They partner with professionals in their communities to enrich their experiences. Most of all, students learn to move forward through challenges and celebrate "Eureka!" moments.

Eligibility: Science, math, and technology educators at high schools and non-profit educational organizations who have not received an InvenTeam grant within the past three years.

Award: Up to \$10,000.

Deadlines: Early feedback March 1, 2013, initial application April 5, 2013.

Information: <http://web.mit.edu/inventeams/about.html>

Frequently asked Questions: <http://web.mit.edu/inventeams/faq.html>

Apply: <http://web.mit.edu/inventeams/apply.html>

Title: McCarthy Dressman Education Foundation Grants

The McCarthy Dressman Education Foundation partners with individuals to expand educational opportunities for America's youth that inspire students by nurturing their curiosity about the world and their place in it. Funding includes scholarships that provide far more than just tuition and books; grants that benefit the lives of more than just those who receive them; and results that reach far beyond the classroom in which the projects are introduced.

Grants include Academic Enrichment grants for maximizing innovation and results in classrooms and education departments, Teacher Development grants for increasing the effectiveness of individual educators and small teams of teachers, and student teaching scholarships at New Mexico State University; the University of California, Santa Cruz; The University of Texas at Austin; and West Virginia University.

Eligibility: Educators who are employed by schools or non-profit organizations (e.g. community centers, museums, etc.)

Award: Up to \$10,000 per year for a maximum of three years.

Deadline: Applications accepted Jan 15-April 15, 2013.

Information: <http://mccarthydressman.org/teacher-development-grants/>

Title: American Honda Foundation Youth and Scientific Education Grants

The American Honda Foundation makes grants to nonprofits, programs, and organizations that directly benefit STEM (science, technology, engineering, and math) youth education.

Eligibility: K-12 educational institutions, non-profit organizations, gifted student programs, media concerning youth education, youth education projects, programs pertaining to academic or curriculum development that emphasize innovative educational methods and techniques, and more.

Award: \$20000-60000.

Deadline: May1, 2013 (Four times yearly, February 1, May 1, August 1, November 1).

Grant Information: <http://corporate.honda.com/america/philanthropy.aspx?id=ahf>

Detailed Application Brochure (pdf):

http://corporate.honda.com/images/banners/america/AHF_brochure.pdf

Online Application:

http://www.cybergrants.com/pls/cybergrants/quiz.display_question?x_gm_id=2587&x_quiz_id=1338&x_order_by=1

Title: *Living In a Material World Grants*

Source: ASM International Foundation

To help teachers bring materials science into their classrooms, the ASM International Foundation is awarding 10 grants of \$500 each to K-12 teachers. The purpose of these grants is to enhance awareness of materials science and the role of materials scientists in society.

The application procedure requires a 2-page proposal describing a curriculum-based hands-on project that involves student observation, communication, mathematics, and science skills while enhancing their awareness of the materials around them. A 1-page summary report will be required of winning proposals.

The purpose of these grants is to enhance awareness of materials science and the role of materials scientists in society. With a network of local Chapters across North America, ASM members are willing to work closely with local teachers to develop and implement these lessons.

Eligibility: K-12 teachers.

Award: \$500.

Deadline: May 25, 2013.

Information:

<http://www.asminternational.org/portal/site/www/foundation/educators/k-12-grants/>

Title: *Student Achievement Grants*

Source: National Education Association (NEA) Foundation.

The NEA Foundation provides grants to improve the academic achievement of students in U.S. public schools and public higher education institutions in any subject area(s). The proposed work should engage students in critical thinking and problem solving that deepen their knowledge of standards-based subject matter. The work should also improve students' habits of inquiry, self-directed learning, and critical reflection.

Eligibility: Public school teachers, public education support professionals, and/or faculty and staff in public institutions of higher education.

Award: \$2000 and \$5,000.

Deadline: June 1, 2013 (Three times yearly, February 1, June 1, October 15).

Information: <http://www.neafoundation.org/pages/nea-student-achievement-grants/>

Title: *Learning and Leadership Grant***Source: National Education Association (NEA) Foundation.**

The NEA Foundation provides grants to support public school teachers, public education support professionals, and/or faculty and staff in public institutions of higher education for one of the following two purposes: Grants to individuals fund participation in high-quality professional development experiences, such as summer institutes or action research; or grants to groups fund collegial study, including study groups, action research, lesson study, or mentoring experiences for faculty or staff new to an assignment.

Eligibility: Public school teachers, public education support professionals, and/or faculty and staff in public institutions of higher education.

Award: \$2,000 for individuals and \$5,000 for groups engaged in collegial study. All \$5,000 group grant applicants must include partner information.

Deadlines: June 1, 2013. (three times yearly, February 1, June 1, October 15).

Information: <http://www.neafoundation.org/pages/learning-leadership-grants/>

Title: *Music Education Grants***Source: Mockingbird Foundation, Inc.**

The Mockingbird Foundation offers grants to schools and nonprofit organizations that effect improvements in areas of importance to the Phish fan community. Mockingbird is interested in projects that foster self-esteem and free expression, and particularly (though not exclusively) interested in programs which benefit disenfranchised groups, including those with low skill levels, income, or education. Grants range from \$100 to \$5,000 and are made on a one-time basis.

Eligibility: 501(c)(3) nonprofit organizations and public schools. School-based grantees cannot be independent of the school, must take place at the school, and must be supervised by the applicable municipality.

Award: \$100 to \$5,000.

Deadline: Submission of initial inquiries occurs via an online form which opens by January and is due by August 1 2013.

General Information: <http://mbird.org/funding/guidelines/>

Application Information: <http://mbird.org/funding/inquiries/>

Title: *National Educators Grants***Source: P. Buckley Moss Foundation**

The P. Buckley Moss Foundation for Children's Education has grants available to be awarded in 2013 to educators who need assistance to further their 2014 program goals.

Applications may be made for a grant for a project within schools serving all children (including students who learn differently) pre-K – 12, that integrates the arts into educational programs. The purpose for this grant is to aid and support teachers who wish to establish or maintain an effective learning tool using the visual arts within the school day.

Eligibility: Schools pre-K through 12.

Award: Up to \$1,000.

Deadline: September 30, 2013

General Information: <http://www.mossfoundation.org/national-educators-grants-0>

Application Information:

<http://www.mossfoundation.org/sites/mossfoundation.garzawebdesign.com/files/images/Educator%20Grant%20Application%202013.doc>

Title: RGK Foundation Grants

RGK Foundation awards grants in the broad areas of Education, Community, and Health/Medicine. The Foundation's primary interests within Education include programs that focus on formal K-12 education (particularly mathematics, science and reading), teacher development, literacy, and higher education.

Youth development programs supported by the Foundation typically include after-school educational enrichment programs that supplement and enhance formal education systems to increase the chances for successful outcomes in school and life. The Foundation is also interested in programs that attract female and minority students into the fields of mathematics, science, and technology.

Eligibility: Grants are made only to nonprofit organizations certified as tax exempt under Sections 501(c)(3) or 170(c) of the Internal Revenue Code and are classified as "not a private foundation" under Section 509(a). Hospitals, educational institutions, and governmental institutions meeting these requirements are eligible to apply.

Award: The average Foundation grant is \$25,000.

Deadline: All applicants must complete an electronic Letter of Inquiry from the Web site as the first step. RGK Foundation will entertain one electronic Letter of Inquiry (LOI) per organization in a twelve-month period. The Foundation will send an e-mail message either declining your request or inviting you to submit a formal application packet for further consideration.

General Information: <http://www.rgkfoundation.org/public/guidelines#eligible>

Title: Fender Music Foundation Grants

The Fender Music Foundation's mission is to aid non-profit music programs across America. The Foundation accepts grant applications throughout the year from 501(c)(3) organizations that are established, ongoing, and sustainable. Organizations should provide music instruction for people of any age who would not otherwise have the opportunity to learn.

Eligibility: 501(c)(3) organizations.

Award: Musical equipment from \$500 to \$5000 in value.

Deadline: The foundation does not have set dates for reviewing grant candidate forms. We recommend that you simply submit the form at your convenience. If your program is selected, you must submit a completed grant application form within one month of receiving it.

Grants Info: <http://www.fendermusicfoundation.org/grants/index.cfm?sec=info>

OTHER OREGON SCHOOL NEWS

Note that some links are time sensitive and will drop from the host website after a few days.

Innovative Technology Doesn't Mean Instructionally Innovative

http://blogs.edweek.org/edweek/sputnik/2012/11/innovative_technology_doesnt_mean_instructionally_innovative.htm

Common Core vs. Common Sense

http://www.edweek.org/ew/articles/2012/12/05/13wolk_ep.h32.html?tkn=OOTFzQlfDLjuN9%2B56he13n8oup!%2BBT%2BYZTTu&cmp=clp-edweek

Yamhill County high schoolers earn college credit for viticulture

http://www.oregonlive.com/portland/index.ssf/2012/12/yamhill_county_high_schoolers.html

State sees Sabin-Schellenberg tech center as blueprint for expansion

<http://portlandtribune.com/cr/24-news/125420-state-sees-sabin-schellenberg-tech-center-as-blueprint-for-expansion>

Taking a Closer Look at Teachers' Technology Shortcomings

http://blogs.edweek.org/edweek/DigitalEducation/2013/01/a_closer_look_at_teachers_tech_1.html

Discipline Policies Shift With Views on What Works

<http://www.edweek.org/ew/articles/2013/01/10/16policies.h32.html?tkn=QOSF4E4V13gt9%2FyIqDGMuO7z3Pcwf1HmpJ6h&cmp=clp-edweek&intc=EW-QC13-EWH>

Gaston High School students find fun in cabinetry work

http://www.oregonlive.com/forest-grove/index.ssf/2013/01/gaston_high_school_manufacture.html

'STEM To STEAM' Uses Art To Teach Science Skills

<http://www.opb.org/news/article/stem-to-steam-uses-art-to-teach-science-skills/>

Transitions are goal at therapeutic school

<http://portlandtribune.com/fgnt/36-news/126167-transitions-are-goal-at-therapeutic-school>

Charter Starters Services

Need Help? Need a quote on a service? Give Us A Call .

(541) 338-7000 or email charterstarters@gmail.com

For New Initiatives:

- **Writing the planning grant**
- **Charter application development**
- **Writing the Charter**
- **Board development and training**
- **Negotiation assistance with authorizers**
- **Business plan development**
- **Developing educational model**
- **Accountability systems (roles and responsibilities)**
- **Budget services**
- **Team building**

For Existing Schools:

- **Establishing financial systems and internal controls**
- **Recruitment and hiring of staff**
- **Policy writing**
- **Board training**
- **Project planning, management and implementation support**
- **Strategic planning**
- **Public relations and internal communications**
- **Team building**
- **Conflict resolution/Mediation**
- **School Assessments**

Mark and Lou *Charter Starters*