Staff Recommendation Report and Board Resolution: Initial Conversion Petition for Whitmore Charter School (2027–2032)

1. Executive Summary and Recommendation

This report presents the administrative evaluation and recommendations of District staff regarding the initial charter petition submitted to convert Whitmore Elementary School into **Whitmore Charter School** , a locally funded, district-operated public conversion charter school. Submitted on October 22, 2026, by Lead Petitioner Rebecca Lewis (Executive Director/Principal), the petition requests an initial five-year charter term effective from July 1, 2027, through June 30, 2032, under California Education Code section 47605.

The proposed conversion builds upon the district reorganization merging the former Whitmore Elementary School District and Mountain Union Elementary School District into the **Mountain Grove Elementary School District** ("Mountain Grove"). Whitmore Charter School will preserve local elementary and middle school educational choices while establishing a supported pathway through high school for rural families in Whitmore, Montgomery Creek, Round Mountain, Big Bend, and surrounding communities.

Recommendation

Superintendent Tony Moebes recommends that the Governing Board of the Mountain Grove Elementary School District APPROVE the initial charter petition for Whitmore Charter School for a five-year term (July 1, 2027 – June 30, 2032).

Superintendent Moebes further recommends that the Governing Board adopt the factual findings contained within this report and execute Board Resolution No. 2026/27-04 approving the initial conversion charter petition.

Petition Specification	Proposal Details
School Name	Whitmore Charter School
Petition Type	Initial Public Conversion Charter Petition (EC § 47605(a)(2))
Authorizer & Operator	Governing Board of Mountain Grove Elementary School District
Lead Petitioner	Rebecca Lewis, Executive Director/Principal
School Site Campus	Existing Whitmore Elementary Campus, 30611 Whitmore Road, Whitmore, CA 96096

Instructional Design	Dual Pathway: Onsite TK–8 multi-grade classroom instruction & TK–12 homeschool independent study with optional hybrid attendance
Initial Grade Span	TK–8 in 2027–28
Phased Grade Expansion	Grade 9 in 2028–29; Grade 10 in 2029–30; expanding one grade annually to Grade 12 in 2031–32
Fiscal Administration	Shasta County Office of Education (SCOE) Business Services Department

2. Statutory Framework and Initial Conversion Review

Under the Charter Schools Act of 1992 (Education Code section 47600 *et seq.*), school district governing boards serve as authorizers for conversion charter petitions submitted within their jurisdictional boundaries. The review of an initial charter petition is governed strictly by Education Code section 47605(c).

Statutory Standard for Initial Petitions

Pursuant to Education Code section 47605(c), a governing board **shall grant** a petition for the establishment of a charter school unless it makes written factual findings, specific to the particular petition, setting forth facts to support one or more of the following eight statutory grounds for denial:

1. The charter school presents an unsound educational program for the pupils to be enrolled.
2. The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition.
3. The petition does not contain the required number of signatures specified in subdivision (a) of Education Code section 47605.
4. The petition does not contain an affirmation of each of the conditions described in subdivision (e) of Education Code section 47605.
5. The petition does not contain reasonably comprehensive descriptions of all required charter elements specified in paragraph (5) of subdivision (c) of Education Code section 47605.
6. The petition does not contain a declaration of whether or not the charter school shall be deemed the exclusive public school employer of the employees of the charter school under EERA.
7. The charter school is demonstrably unlikely to serve the interests of the entire community in which the school is proposing to locate.

8. The school district is not positioned to absorb the fiscal impact of the proposed charter school.

Conversion Teacher Signature Compliance

For a public school conversion petition under Education Code section 47605(a)(2), the law requires that the petition carry signatures from at least 50 percent of the permanent-status teachers currently employed at the public school proposed for conversion, expressing meaningful interest in teaching at the charter school.

As verified by Superintendent Tony Moebes on October 22, 2026:

- **Total Eligible Permanent-Status Teachers at Whitmore Elementary** : 2 (Connor Jackson and Madalyn Balakhani).
- **Minimum Statutory Signatures Required (50%)** : 1 teacher signature.
- **Verified Signatures Collected** : 2 teacher signatures (100% participation).

The petition fully satisfies the statutory signature threshold for conversion charter establishment.

3. Comprehensive Evaluation of Required Charter Elements

District staff, in consultation with legal counsel and subject-matter specialists, conducted an exhaustive review of the 15 required charter elements under Education Code section 47605(c)(5) and the statutory assurances under section 47605(e).

Element 1: Educational Philosophy and Program

The petition establishes a robust educational philosophy centered on personalized instruction, mastery learning, and strong family partnerships. Whitmore Charter School will offer two complementary instructional pathways:

1. **Onsite TK–8 Classroom Program** : Daily attendance in multi-grade classrooms at the Whitmore campus, featuring differentiated instruction, explicit literacy and mathematics teaching, and cross-age collaboration.
2. **TK–12 Homeschool / Independent Study Program** : A flexible option where each pupil is paired with a credentialed Teacher of Record who develops a Personalized Learning Plan. Optional hybrid attendance enables students to attend scheduled campus classes, science labs, group projects, and enrichment partner activities.

As secondary grades open, the school will institute a comprehensive 230-credit high school diploma framework designed for college and career readiness:

Subject Area	Proposed Credits	Curriculum & Progression Highlights
English Language Arts	40	English 9–12 (10 credits per year); literature, composition, research, and media literacy

Mathematics	30	Algebra I, Geometry, Algebra II, or an adopted Integrated Math I–III sequence
Science	20	Biology with Laboratory (10 credits) and Chemistry with Laboratory (10 credits)
History & Social Science	30	World History (10), U.S. History (10), Government/Civics (5), and Economics (5)
Physical Education	20	PE I and PE II (10 credits each)
Visual/Performing Arts, World Language, or CTE	10	Board-approved Visual Arts I, Spanish I–II, or CTE alternatives aligned with UC A–G
Ethnic Studies	5	Stand-alone 5-credit semester requirement fulfilling California state mandates
Personal Finance	5	Stand-alone 5-credit practical financial literacy course offered annually starting in 2028–29
Health & Career Readiness	10	Health Education (5 credits) and College & Career Readiness portfolio (5 credits)
Electives & College Prep	60	Advanced academic electives, CTE pathways, or college dual-enrollment coursework
Total Required Credits	230	Complete secondary sequence supporting both general diploma and UC/CSU A–G tracks

Elements 2 & 3: Measurable Pupil Outcomes and Progress Measurement

The petition outlines measurable annual targets mapped across all Eight State Priorities under California's Local Control Funding Formula (LCFF). Student achievement will be evaluated using standardized measures (CAASPP, CAST, ELPAC, Physical Fitness Testing) alongside local diagnostic instruments (Renaissance STAR Reading and Mathematics) administered in fall, winter, and spring windows. Common four-level rubrics (Extends, Meets, Developing, Beginning) will evaluate writing samples and student work portfolios across grade spans.

Element 4: Governance and Administrative Structure

Whitmore Charter School will operate as a dependent charter school governed directly by the Governing Board of the Mountain Grove Elementary School District. The Board retains exclusive decision-making authority over policies, budgets, curriculum, staffing allocations, contracts, and charter oversight.

- **Superintendent Oversight** : Superintendent Tony Moebes supervises the Executive Director/Principal and oversees administrative functions, delegating duties as appropriate.
- **Fiscal Administration** : The Shasta County Office of Education (SCOE) Business Services Department performs all financial accounting, LCFF calculations, payroll, accounts payable, and state reporting on behalf of the District.

Element 5: Employee Qualifications and Staffing

All certificated teachers will hold appropriate California Commission on Teacher Credentialing (CTC) certificates or authorizations matching their assignments. In independent study, teachers of record will maintain compliant pupil-to-certificated-staff ratios.

Element 6: Health and Safety Procedures

The petition incorporates comprehensive safety protocols, including mandatory employee background checks, tuberculosis screening, immunizations, and annual updating of the Whitmore campus Safety Plan by March 1. Protocols address rural emergency readiness, including wildfire, power outages, and emergency communications.

Element 7: Racial and Ethnic Balance

Outreach strategies will utilize district communications, community partnerships, and early childhood networks to attract a student body reflective of the District's geographic population, including English learners, socioeconomically disadvantaged pupils, and students with disabilities.

Element 8: Admission Policies and Preferences

Admissions will be open to all California residents subject to facility capacity. In accordance with Education Code section 47605(e), if applications exceed capacity, seats will be allocated via a public random drawing applying the following authorizer-approved preference tiers:

1. Pupils residing within Whitmore Elementary School's former attendance area.
2. Pupils residing within Mountain Grove Elementary School District boundaries.
3. All other eligible California applicants. *Note: Siblings of currently admitted students receive priority within each geographic tier.*

Elements 9–15: Operational Procedures, Employee Rights, and Closure

- **Suspension & Expulsion (Element 9)** : Incorporates constitutionally adequate due process, written notice, neutral hearing panels, and mandatory disability safeguards under IDEA and Section 504. Out-of-school suspensions for willful defiance are prohibited in TK–12.
- **Retirement Systems (Element 10)** : Staff remain District employees participating in CalSTRS, CalPERS, or Social Security.
- **Attendance Alternatives (Element 11)** : District pupils declining charter attendance may attend Montgomery Creek School, the designated noncharter TK–8 alternative, with district-arranged transportation or mileage reimbursement.
- **Employee Rights (Element 12)** : Employees remain Mountain Grove District employees with retained seniority, leave, and bargaining representation under EERA.
- **Dispute Resolution & Closure (Elements 13 & 14)** : Formal dispute resolution procedures protect authorizer oversight rights. Detailed closure provisions govern asset disposition, audit completion, and student record transfers.
- **Exclusive Employer Declaration (Element 15)** : Declares Mountain Grove Elementary School District as the exclusive public employer under EERA.

4. Multi-Year Financial Analysis and Operational Viability

A critical component of charter authorizer review is evaluating the operational and fiscal soundness of the proposed charter school. Financial projections for Whitmore Charter School were developed by the **Shasta County Office of Education (SCOE) Business Services Department** , which handles all business and financial administration for the merger of the former Whitmore and Mountain Union school districts into Mountain Grove, as well as the charter school.

Enrollment and Average Daily Attendance (ADA) Growth

Financial models utilize conservative enrollment growth assumptions matching the planned addition of secondary grades:

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Enrollment & ADA Trajectory (2027–28 to 2029–30)
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2027–28 (TK–8)  :  Enrollment = 67  |  ADA = 63.48  (Current
baseline; ~88% nonclassroom-based)

2028–29 (TK–9)  :  Enrollment = 77  |  ADA = 72.48  (Adds 10
9th-grade students)

2029–30 (TK–10) :  Enrollment = 85  |  ADA = 80.48  (Adds 8 9th-grade
students; 9th advances to 10th)
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Multi-Year Budget Projection Summary

The FCMAT Charter Calculator and SCOE multi-year financial models demonstrate strong long-term solvency following planned initial transition investments:

Financial Metric	FY 2027–28 (TK–8)	FY 2028–29 (TK–9)	FY 2029–30 (TK–10)
Statutory COLA %	**3.42%**	**3.31%**	**3.24%**
Funded LCFF ADA	**63.48**	**72.48**	**80.48**
LCFF Funding per ADA	**$12,542**	**$13,194**	**$13,864**
LCFF Entitlement Revenue	**$796,149**	**$956,276**	**$1,115,764**
Federal Revenues	$25,320	$25,320	$25,320
Other State Revenues	$184,308	$187,833	$191,574
Other Local Revenues	$140,433	$131,293	$139,293
Total Operating Revenues	**$1,146,210**	**$1,300,722**	**$1,471,951**

Certificated Salaries (1000s)	$415,738	$501,047	$500,008
Classified Salaries (2000s)	$101,193	$104,810	$109,384
Employee Benefits (3000s)	$204,922	$237,987	$238,404
Books and Supplies (4000s)	$75,701	$75,701	$75,701
Services & Operating Expenses (5000s)	$413,671	$418,741	$421,341
Capital Outlay & Other Outgo (6000-7000s)	$19,760	$11,760	$11,760
Total Operating Expenditures	**$1,230,985**	**$1,350,046**	**$1,356,598**
Net Operating Surplus/(Deficit)	**$(84,775)**	**$(49,324)**	**+$115,353**
Beginning Fund Balance	**$547,438**	**$462,663**	**$413,339**
Ending Reserve Fund Balance	**$462,663**	**$413,339**	**$528,692**

Fiscal Analysis and Reserve Cushion

1. **Initial Deficit Absorption** : Transition and startup investments—including $2,500 for marketing/advertising, $10,000 for charter campus signage, IT technology upgrades, and curriculum purchases—generate planned operating deficits of $(84,775) in Year 1 and $(49,324) in Year 2.
2. **Reserve Solvency** : Operating deficits are fully absorbed by Whitmore's robust starting fund balance of $547,438. At no point do ending reserves drop below $413,000, far exceeding state-recommended reserve thresholds.
3. **Surplus Realization** : By Year 3 (2029–30), as secondary grade expansion increases LCFF revenue by over $319,000 relative to Year 1, the school achieves a net operational surplus of **+$115,353** , expanding total reserve balances to **$528,692** .
4. **Mandated Statutory Rates** : Budget models incorporate required employer retirement contribution rates (CalSTRS at 19.1% annually; CalPERS at 26.8%, 25.9%, and 25.1%) and include authorizer oversight and SCOE business service administration fees across all years.

5. Staff Findings and Administrative Recommendation

Based on the thorough evaluation conducted by District staff, legal counsel, and the Shasta County Office of Education Business Services Department, staff concludes that:

1. The initial charter petition presents a sound educational program that will deliver substantial educational benefits to rural students in TK–12.
2. The petitioners possess the requisite expertise, administrative capability, and fiscal support from SCOE Business Services to successfully implement the program.
3. The petition contains 100 percent of required permanent-teacher conversion signatures, exceeding the 50 percent statutory minimum under Education Code section 47605(a)(2).
4. The petition includes clear and unequivocal affirmations of all required statutory conditions under Education Code section 47605(e).
5. The petition contains reasonably comprehensive descriptions of all 15 charter elements required by Education Code section 47605(c)(5).
6. The petition explicitly declares Mountain Grove Elementary School District as the exclusive public school employer under EERA.
7. The school district is fully positioned to absorb the operational and fiscal impact of the charter conversion.

Conclusion : There is insufficient factual evidence to support any of the eight statutory grounds for denial under Education Code section 47605(c). Approval of the initial petition is consistent with sound educational practice and state law.