



THE

September 2016, Volume 3, Issue 1

Welcome Back to School

HIGHMARK QUARTERLY

Ethics & Integrity

Discipline

Empowerment & Accountability

Quality

Teamwork

Agility

Director's Message



Author Jim Collins noted that "Greatness is not a function of circumstance. Greatness, it turns out, is largely a matter of conscious choice, and discipline."

At Highmark we are drawn to schools that show a propensity towards greatness. Our Business Development team has a long list (seemingly endless) of information that is gathered when deciding which new school projects we take on. Sometimes greatness in schools is immediately evident. Other schools take time and experience to emerge as great. And like everything else in life, there are other times when greatness is not to be found.

To our remarkable existing school partners I would say please keep pushing for greatness. Even if a school feels they are great (indeed we have many in the Highmark family), greatness is only temporary if it is not constantly nurtured.

To those schools that are considering teaming up with Highmark I would say that we are constantly working on improving our company and our processes. We truly strive for greatness, and we will always align ourselves with extraordinary partners.

If the Jim Collins quote above is correct, then we would each be best served by measuring all of our choices by asking "Is this thing moving me towards greatness?" After all, if we are moving towards greatness, surely we will do amazing things.

Jeremy Miller
Director of Accounting



Parker Performing Arts
Under Construction

Conference Notes

As Highmark expands its footprint, the list of state and national charter school conferences we sponsor and attend grows. At many of these events, we present workshops on best practices for facility planning.

As of this newsletter publication, Highmark attended the Georgia and Colorado conferences in February. March found us in California where we were part of a panel discussing the iLead project as a case study. Also in March, we presented a workshop on facility planning at the first of two North Carolina conferences in the year. This same workshop was hosted in May in New Jersey, where it was offered to educators and administrators for continuing education credits. In New Jersey, we sponsored a VIP event and enjoyed Governor Christie's closing speech. We also spent some quality time getting to know the new executive director of the New Jersey Association and its general counsel.

The summer months of June, July, and August brought us to the Utah state charter conference; the National Alliance of Public Charter Schools' annual conference in Memphis where we hosted our signature cocktail reception; an authorizer conference in Ohio where we sponsored the opening reception, and finally at the second North Carolina conference where we sat on a panel with Bouma Construction and Andrus Architecture. Also at the most recent North Carolina conference, we sponsored the opening reception and met with Governor Pat McCrory.

On the near horizon, we have Texas, Michigan, and the National Association of Charter School Authorizers' conferences all in October. Our popular presentation topic titled, "12 Facility Planning Mistakes Every Charter School Makes (and how to avoid them)" will be the focus of our workshop at the Texas conference.

Rounding out the year in November and December, you'll find Highmark at the Florida, Illinois, South Carolina, Ohio, New Mexico, and Louisiana state conferences. Like Texas, the Ohio and New Mexico charter school association has accepted our "12 Mistakes" workshop, and we will be presenting them in those conferences.

I often say, "You can't have too many friends in this industry." Regular attendance, sponsorship of, and presenting at these events are some of the many ways we stay close to our industry friends and make new ones.

- Patrick Beausoleil, Vice President of Business Development

Highmark 2016-'17 Development Activity by State

The 2016-'17 school year brings exciting new development, including new partners and expansions on previously completed facilities.

CALIFORNIA

- BASIS Independent Silicon Valley
San Jose -- Expansion
- College Prep Middle School
La Mesa-- New Build

NEW JERSEY

- International Academy of Atlantic City
Atlantic City -- Adaptive Reuse
- International Academy of Trenton
Trenton -- Adaptive Reuse
- Millville Public Charter School
Millville -- Adaptive Reuse
- Vineland Public Charter School
Vineland -- New Build

NEW YORK

- BASIS Independent Brooklyn
Brooklyn -- Expansion

NORTH CAROLINA

- Pine Springs Preparatory Academy
Holly Springs -- New Build
- Wilson Preparatory Academy
Wilson -- Expansion

OHIO

- iLEAD Spring Meadows
Holland -- Adaptive Reuse

SOUTH CAROLINA

- Bradford Preparatory Academy High School
Charlotte -- New Build



College Preparatory Middle School
California



International Academy of Trenton
New Jersey



Parker Performing Arts School
Colorado

Check out our new website
www.highmarkschools.com



Kindergarten Class Room at Cirrus Academy



Epicenter is a powerful, web-based system that leading authorizers, boards, schools, and management organizations are using to improve their performance and productivity. Epicenter enables Highmark to view and share information instantly, make key documents readily available, and automate workflow and reporting. And with Epicenter, Highmark can determine who has access to which documents.

Highmark saw the power of Epicenter firsthand in how it simplifies, brings consistency to, and streamlines board management, compliance, and tasks. Highmark uses Epicenter to manage the process of vetting schools, streamlining required reporting, managing documents, and maintaining data and historical information.

Among Epicenter's unique features are dashboards, which allow teams to see the success of a single school or an entire portfolio. The Demographics Dashboard displays the makeup of a given school or portfolio, including many of the fields measured at the local, state, and national levels to determine academic success. The Finance Dashboard uses the framework developed by the National Association of Charter School Authorizers to assess the financial performance of a portfolio of schools. Highmark utilizes many of these features and is in the process of implementing these options for our partners.

When it comes to school board meetings, planning and preparation are essential for success. Epicenter can simplify board preparations and equip boards with the data and documents needed to govern wisely. Whether working with one board or a portfolio of boards, Epicenter streamlines the necessary preparation for board meetings. The enhanced coordination and communication create more time for the board to align around what truly matters - educating kids. Highmark will be hosting online webinars to share these practices and tools with key school stakeholders.

For more information [click here](#) or call 1-855-889-1623 to learn more about how Epicenter can help you.

For any questions regarding your Epicenter account please contact Sami Denos at samantha@highmarkschools.com

Compliance Reporting

We care about each of our client schools and want to ensure the long-term success of each school. As such we have put into place requirements due to Highmark monthly, quarterly, and annually.

The following list of compliance requirements is typical but may not be comprehensive for every Highmark client school.

Financial

1. Quarterly unaudited financial statements – due within 30 days of the end of quarter
2. Annual audited financial statements – due within 30 days of issuance
3. Annual approved budget – due within 30 days of submittal to state enrollment
4. Monthly enrollment – due on the 5th of the following month
5. Annual state reported enrollment – due as soon as available

Misc.

1. Approved board meeting minutes – due once approved
2. Insurance certificate – due 30 days prior to expiration
3. Quarterly facility maintenance report – due by the end of each quarter
4. Annual inspections – due upon renewal

To find what is required for your school, review your lease with your school's governing board or check with Highmark's portfolio management team at portfolio@highmarkschools.com.

Partner Spotlight



Diversified Insurance Group is a full-service insurance agency, benefits consultant, and risk management consultant. Diversified operates in every state in the U.S. and in a number of countries around the world. We are proud to partner with Highmark School Development in providing Property Insurance protection for Highmark's facilities across the United States.

In the event you suffer property damage at your school, please take immediate action to mitigate any further loss or damage to the facility. All buildings are insured by CNA Insurance and instructions for reporting the claim to CNA are as follows.

Named Insured: Highmark School Development, LLC

Policy Number: 6022950961

- **First notice of Loss:** Losses can be submitted 24/7 using the following options:

Phone: 1-877-262-2727

Fax: 800-953-7389

Email: lossreport@cnaasap.com

Web: www.cna.com, report a claim tab

- **Loss Escalation:** CNA's standard response to a new loss is 24 hours from the time the claim is reported. However, they understand that some loss scenarios require expedited response. Please report the following types of losses via telephone from proper escalation:

- Fire and major water loss
- Claims that disrupt business operations or place students/employees in unsafe conditions

- **New Loss Mitigation:** Please make immediate contact with a local emergency mitigation service provider for water, smoke, and fire losses. CNA will work with the vendor that you've retained.

- **Loss Handling/Damages**

- Initial Contact with your file handler will provide you with a roadmap for resolution of the claim
- Damages are often identified and agreed to through the use of an independent appraiser who will document the damages and work with your contractor of choice to ensure that resulting damages are repaired as needed

- Your assigned file handler makes all decisions around coverage and controls the claim actions. Please direct coverage and claim process questions directly to your assigned adjustor

- **Your Support Team:** We expect that claims will be handled without the need for intervention. However should concerns arise, the following team members are here for any questions or concerns that you may have along the way.

- **Julie Hotz, Sr.** Client Service Manager

P: (505)271-6507 E: julie_hotz@cna.com

- **Kristen Kulesza,** Claim Manager

P: (303)858-5504 E: kristin.kulesza@cna.com