



Monarch River Academy

2293 East Crabtree Avenue, Porterville, CA 93257
Ph (559) 754-1442 | Fax (559) 335-4089

**Regular Scheduled Board Meeting
Monarch River Academy
March 2, 2020 – 5:00 pm
337 N Plaza Drive
Visalia CA, 93291**

AGENDA

1. Call to Order
2. Flag Salute
3. Approval of the Agenda
4. Public Comments
5. Principal's Report
 1. Student Achievement
6. Discussion and Potential Action on the February Board Meeting Minutes
7. Discussion and Potential Action on the Second Interim Report
8. Discussion and Potential Action on the Auditor Selection
9. Discussion and Potential Action on the MOU with other Schools
10. Discussion and Potential Action on the Local Control Accountability Plan
11. Discussion and Potential Action on the Growth Projections and Enrollment Windows
12. Discussion and Potential Action on the Instructional Funds Depreciation Chart
13. Discussion and Potential Action on the 2020-2021 School Calendars
14. Discussion and Potential Action on the Principal Evaluation
15. Discussion and Potential Action the Lottery Policy
16. Discussion and Potential Action on the Comprehensive School Safety
17. Board of Directors Requests
18. Announcement of Next Regular Scheduled Board Meeting
19. Adjournment



Monarch River Academy

2293 East Crabtree Avenue, Porterville, CA 93257

Ph (559) 754-1442 | Fax (559) 335-4089

Public comment rules: Members of the public may address the Board on agenda or non-agenda items. Please fill out a yellow card available at the entrance. Speakers may be called in the order that requests are received, or grouped by subject area. We ask that comments are limited to 2 minutes each, with no more than 15 minutes per single topic so that as many people as possible may be heard. By law, the Board is allowed to take action only on items on the agenda. The Board may, at its discretion, refer a matter to district staff or calendar the issue for future discussion.

Note: Monarch River Academy Governing Board encourages those with disabilities to participate fully in the public meeting process. If you need a disability-related modification or accommodation, including auxiliary aids or services, to participate in the public meeting, please contact the Governing Board Office at 818-207-3837 at least 48 hours before the scheduled board meeting so that we may make every reasonable effort to accommodate you. (Government Code § 54954.2; Americans with Disabilities Act of 1990, § 202 (42 U.S.C. § 12132)).



Monarch River Academy

2293 East Crabtree Avenue, Porterville, CA 93257
Ph (559) 754-1442 | Fax (559) 335-4089

Regular Scheduled Board Meeting - Monarch River Academy

February 13, 2020 – 5:00 pm

337 N Plaza Drive, Visalia CA, 93291

Attendance: Sam Nofziger, Craig Wheaton, Monique Ouwinga, Sarah Sanchez, Ashley Wiens

Absent: None

Also Present: Dr. Laurie Goodman, Mariah Jordan

Call to Order:

Sam Nofziger called the meeting to order at 5:11 pm.

Flag Salute:

The flag salute was conducted.

Approval of the Agenda:

Craig Wheaton motioned to approve the agenda. Sarah Sanchez seconded.

-Unanimous.

Public Comments:

None.

Principal's Report:

The Principal reported on:

- Student Achievement
- WASC Accreditation Visit

Discussion and Potential Action on the Regular Scheduled January Board Meeting Minutes and the Special February Board Meeting Minutes:

Sarah Sanchez motioned to approve the Regular Scheduled January Board Meeting Minutes and the Special February Board Meeting Minutes. Ashley Wiens seconded.

-Unanimous.



Monarch River Academy

2293 East Crabtree Avenue, Porterville, CA 93257
Ph (559) 754-1442 | Fax (559) 335-4089

Discussion and Potential Action on the Homeless Education Policy:

Sarah Sanchez motioned to approve the Homeless Education Policy. Ashley Wiens seconded.
-Unanimous.

Discussion and Potential Action on the Work Sample Policy:

Sarah Sanchez motioned to approve the Work Sample Policy. Monique Ouwinga seconded.
-Unanimous.

Discussion and Potential Action on the Local Control Accountability Plan:

No Action Taken.

Discussion and Potential Action on the Comprehensive School Safety Plan:

Sarah Sanchez motioned to approve the Comprehensive School Safety Plan. Ashley Wiens seconded.
-Unanimous.

Board of Directors Requests:

None.

Announcement of Next Regular Scheduled Board Meeting:

The next Regular Scheduled Board Meeting is March 2, 2020.

Adjournment:

Sarah Sanchez motioned to adjourn the meeting at 5:52 pm. Monique Ouwinga seconded.
-Unanimous.

Prepared by:
Bryanna Brossman

Noted by:

Board Secretary

Monarch River Academy

Monthly Financial Presentation – January 2020

2nd Interim Report

MONARCH RIVER – Highlights

■ Annual Projected Revenue: ↓ 120K

■ Annual Project Expenses: ↑ 190K

■ Annual Projected Surplus: \$582K

■ SB740 Requirements:

Out of Compliance(X)

Cert.	Instr.
38.8%	84.2%
(104,440)	364,277

*Must exceed
40% / 80%*

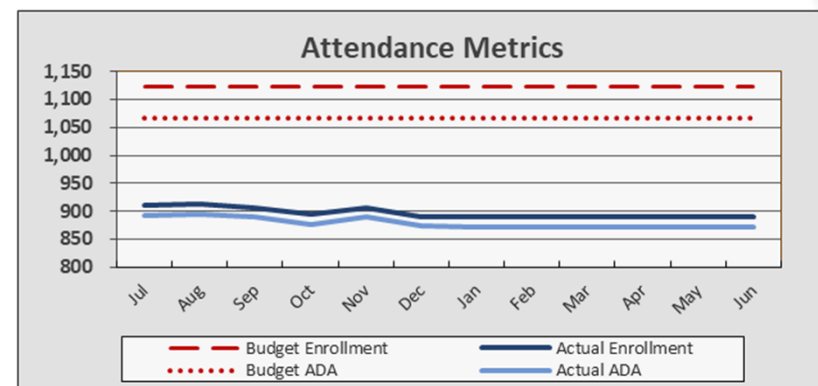
Out of Compliance (X)

Pupil:Teacher Ratio
25.11 :1

*Must be equal to or less than
25:1*

MONARCH RIVER – Attendance

Enrollment & Per Pupil Data			
	Actual	Forecast	Budget
Average Enrollment	897	897	1123
ADA	879	879	1067
Attendance Rate	98.0%	98.0%	95.0%
Unduplicated %	39.4%	39.4%	25.0%
Revenue per ADA		\$9,818	\$9,690
Expenses per ADA		\$9,156	\$9,291



- Forecasted Annual Daily Attendance (ADA) – ↓ by 6 since Dec.
- Unduplicated Pupil % - Unchanged

MONARCH RIVER – Revenue

- Year-to-date federal revenue due to timing.
- Annual (-) variance due to lower forecasted ADA vs budget.
- -120k decrease between December and January due to ADA adjustment

Revenue

<i>Year-to-Date</i>		
Actual	Budget	Fav/(Unf)
State Aid-Rev Limit	\$ 4,527,558	\$ 5,219,465
Federal Revenue	-	64,352
Other State Revenue	-	292,680
Other Local Revenue	1	-
Total Revenue	\$ 4,527,559	\$ 5,576,497

<i>Annual/Full Year</i>		
Forecast	Budget	Fav/(Unf)
\$ 7,940,896	\$ 9,505,986	\$ (1,565,091)
91,411	110,952	(19,541)
597,689	722,257	(124,568)
1	-	1
\$ 8,629,997	\$ 10,339,196	\$ (1,709,200)

MONARCH RIVER – Expenses

- Overall expenses are favorable year-to-date.
- Salary forecast based on payroll through 1/31.
- Staffing adjusted and MOU adjustments reflected in actuals
 - Sub agreement services accounted for most of the difference from December to January.
 - SPED moves are still being evaluated by ICS.

	Year-to-Date			Annual/Full Year		
	Actual	Budget	Fav/(Unf)	Forecast	Budget	Fav/(Unf)
Expenses						
Certificated Salaries	\$ 1,564,051	\$ 1,855,671	\$ 291,620	\$ 2,700,736	\$ 3,181,150	\$ 480,414
Classified Salaries	21,818	-	(21,818)	40,556	-	(40,556)
Benefits	454,835	590,364	135,529	799,959	1,013,425	213,466
Books and Supplies	603,424	722,410	118,986	1,073,881	1,461,139	387,258
Subagreement Services	1,210,056	1,507,709	297,653	2,535,655	2,952,687	417,032
Operations	13,172	38,430	25,257	29,363	78,392	49,029
Facilities	600	22,895	22,295	600	39,249	38,649
Professional Services	251,277	562,485	311,208	708,554	1,067,330	358,776
Depreciation	-	-	-	-	-	-
Interest	130,411	19,600	(110,811)	158,026	120,400	(37,626)
Total Expenses	\$ 4,249,645	\$ 5,319,564	\$ 1,069,919	\$ 8,047,330	\$ 9,913,772	\$ 1,866,442

MONARCH RIVER – Fund Balance

- Ending fund balance exceeds State requirements.
- Annual surplus is 7% of total revenue

	Year-to-Date			Annual/Full Year		
	Actual	Budget	Fav/(Unf)	Forecast	Budget	Fav/(Unf)
Total Surplus(Deficit)	\$ 277,914	\$ 256,933	\$ 20,981	\$ 582,667	\$ 425,424	\$ 157,243
Beginning Fund Balance	-	-		-	-	
Ending Fund Balance	<u>\$ 277,914</u>	<u>\$ 256,933</u>		<u>\$ 582,667</u>	<u>\$ 425,424</u>	
As a % of Annual Expenses	3.5%	2.6%		7.2%	4.3%	

MONARCH RIVER – Multi-Year Forecast

- FY 19-20 through FY21-22 (3 Years) will be reported for 2nd Interims.
- Future years projected with positive cash balances and surpluses.

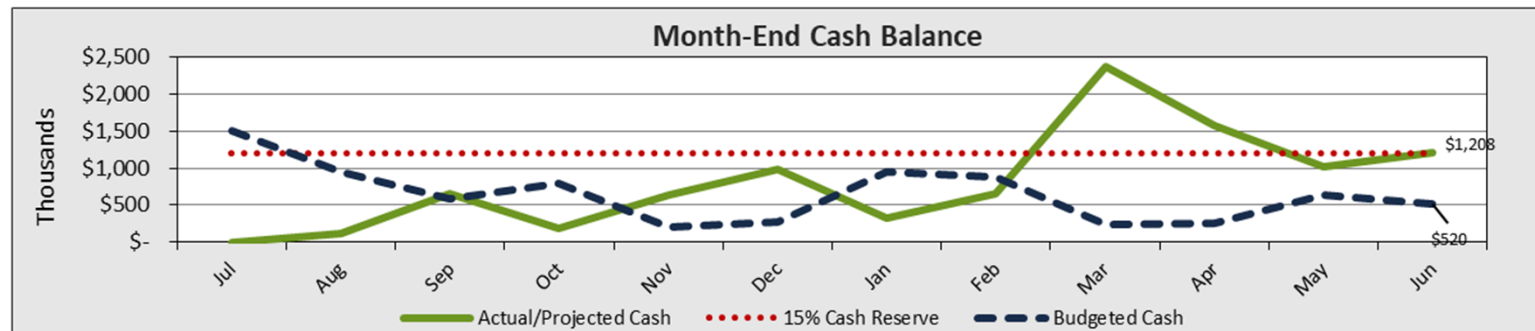
Future Year Assumptions Include:

- 2% COLA on overall expense
- 8% Employee Benefit Increase
- Minimum Wage Increases

	2019-20	2020-21	2021-22
Total Revenue	\$ 8,629,997	\$ 9,059,747	\$ 9,760,055
Total Expenses	8,047,330	8,398,472	9,017,395
Annual Surplus	582,667	661,275	742,660
Beginning Fund Balance	-	582,667	1,243,942
Ending Fund Balance	\$ 582,667	\$ 1,243,942	\$ 1,986,602
<i>As a % of Annual Expenses</i>	7.2%	14.8%	22.0%
Ending Cash Balance	\$ 1,150,685	\$ 1,780,795	\$ 2,339,767

MONARCH RIVER – Cash Balance

- Cash balance remains positive at year end
- Payback from schools and District Office included in projections
- Large cash spike in March due to error in State P-1 reporting



MONARCH RIVER – Compliance Reporting

Area	Due Date	Description	Completed By	Board Must Approve	Signature Required
FINANCE	Feb-28	CSFA Charter School Revolving Loan Application - The CA School Finance Authority's Charter School Revolving Loan Fund provides low-interest loans of up to \$250,000 to new charter schools in their first charter term to assist them with meeting the purposes of the school's approved charter. The program is available to any charter school that is not a conversion of an existing public school, and that has not yet completed the full term of its initial charter. Applications are due February 28, 2020.	Monarch Riverwith Charter Impact support	Yes	Yes
FINANCE	Feb-28	Every Student Succeeds Act Per-Pupil Expenditure Application -The Elementary and Secondary Education Act of 1965 (ESEA), as reauthorized by the Every Student Succeeds Act (ESSA), requires state educational agencies (SEAs) and their local educational agencies (LEAs) to prepare and publish annual report cards that contain specified data elements, including LEA and school-level per-pupil expenditures (PPE).	Charter Impact	No	No
FINANCE	Mar-15	2nd Interim Financial Report - Local educational agencies (LEAs) are required to file two reports during a fiscal year (interim reports) on the status of the LEA's financial health. The first interim report is due December 15 for the period ending October 31. The second is due March 15 for the period ending January 31	Charter Impact	Yes	Yes
DATA	Mar-20	CALPADS - Fall 2 amendment deadline - Please be mindful that Level-2 certification within CALPADS means that these data have been reviewed and approved by your superintendent or IRC administrator. Failure to properly review and amend these data in CALPADS within the allotted amendment window will result in the improper certification of official Fall 2 data within CALPADS, which can impact a number of things, including LCFF funding, student course enrollments, staff assignments and English learner education services.	Charter Impact submits with data provided by Monarch River	No	No
FINANCE	Mar-20	El Dorado SELPA Pre-Test for Year-End Maintenance of Effort (Special Education) - Report due to Charter school's SELPA. Maintenance of Effort (MOE) is a requirement that you spend each year at least what you spent last year in the area of special education (with some exceptions). If you reduce your special education budget (or expenditures) in a given year, you need to be careful to ensure that you have met the MOE requirement. This does not mean you can't reduce costs, but you must do so within the guidelines of federal MOE.	Charter Impact	No	No

MONARCH RIVER – Appendix

- Monthly Cash Flow / Forecast 19-20
- Budget vs. Actual
- Statement of Financial Position
- Statement of Cash Flows
- Due (To)/From All Inspire School Locations
- AP Aging

Monarch River Academy

Monthly Cash Flow/Forecast FY19-20

Revised 2/27/20

ADA = 878.95



Revenues

State Aid - Revenue Limit

8011	LCFF State Aid	-	-	-	4,439,668	-	-	-	865,585	2,607,461	-	-	-	(266,857)	7,645,857	9,169,545	(1,523,687)
8012	Education Protection Account	-	-	-	53,800	-	-	34,090	-	-	34,734	-	-	53,167	175,791	213,370	(37,579)
8096	In Lieu of Property Taxes	-	-	-	-	-	-	-	104,443	52,221	52,221	52,221	52,221	(194,081)	119,248	123,072	(3,824)
		-	-	-	4,493,468	-	-	34,090	970,028	2,659,682	86,955	52,221	52,221	(407,771)	7,940,896	9,505,986	(1,565,091)

Federal Revenue

8181	Special Education - Entitlement	-	-	-	-	-	-	-	18,282	18,282	18,282	18,282	18,282	-	91,411	110,952	(19,541)
		-	-	-	-	-	-	-	18,282	18,282	18,282	18,282	18,282	-	91,411	110,952	(19,541)

Other State Revenue

8311	State Special Education	-	-	-	-	-	-	-	83,149	83,149	83,149	83,149	83,149	0	415,745	504,620	(88,875)
8560	State Lottery	-	-	-	-	-	-	-	-	-	-	-	-	181,944	181,944	217,637	(35,694)
		-	-	-	-	-	-	-	83,149	83,149	83,149	83,149	83,149	181,944	597,689	722,257	(124,568)

Other Local Revenue

8660	Interest Revenue	-	-	-	1	-	-	-	-	-	-	-	-	-	1	-	1
		-	-	-	1	-	-	-	-	-	-	-	-	-	1	-	1

Total Revenue

		-	-	-	4,493,469	-	-	34,090	1,071,459	2,761,114	188,387	153,653	153,653	(225,827)	8,629,997	10,339,196	(1,709,200)
--	--	---	---	---	-----------	---	---	--------	-----------	-----------	---------	---------	---------	-----------	-----------	------------	-------------

Expenses

Certificated Salaries

1100	Teachers' Salaries	121,783	183,007	177,711	175,737	138,753	189,866	168,978	168,336	168,336	168,336	168,336	168,336	-	1,997,513	2,746,500	748,987
1175	Teachers' Extra Duty/Stipends	5,958	15,131	29,331	25,802	23,363	24,413	22,270	23,567	23,567	23,567	23,567	23,567	-	264,103	274,650	10,547
1200	Pupil Support Salaries	1,875	9,601	7,726	7,726	7,726	7,726	7,726	7,726	7,726	7,726	7,726	7,726	-	88,733	35,000	(53,733)
1300	Administrators' Salaries	27,208	27,775	33,344	26,658	50,492	18,659	27,708	27,708	27,708	27,708	27,708	27,708	-	350,386	125,000	(225,386)
		156,824	235,514	248,111	235,923	220,333	240,664	226,682	227,337	227,337	227,337	227,337	227,337	-	2,700,736	3,181,150	480,414

Classified Salaries

2100	Instructional Salaries	-	4,001	3,905	4,054	3,088	3,215	3,555	3,748	3,748	3,748	3,748	3,748	-	40,556	-	(40,556)
		-	4,001	3,905	4,054	3,088	3,215	3,555	3,748	3,748	3,748	3,748	3,748	-	40,556	-	(40,556)

Benefits

3101	STRS	26,561	39,808	41,542	39,915	39,078	38,407	38,313	39,268	39,268	39,268	39,268	39,268	-	459,963	531,252	71,289
3301	OASDI	-	248	242	251	191	199	220	258	258	258	258	258	-	2,641	-	(2,641)
3311	Medicare	2,179	3,376	3,495	3,329	3,106	3,378	3,200	3,389	3,389	3,389	3,389	3,389	-	39,009	46,127	7,117
3401	Health and Welfare	(6,686)	29,163	19,611	23,171	16,770	31,450	21,834	21,000	21,000	21,000	21,000	21,000	-	240,312	367,500	127,188
3501	State Unemployment	5,109	4,135	1,174	567	(237)	17	7,396	4,083	2,041	1,021	1,021	1,021	-	27,347	24,010	(3,337)
3601	Workers' Compensation	-	4,080	2,040	2,040	2,040	2,040	2,082	3,273	3,273	3,273	3,273	3,273	-	30,686	44,536	13,850
		27,162	80,810	68,104	69,274	60,949	75,491	73,046	71,270	69,229	68,208	68,208	68,208	-	799,959	1,013,425	213,466

Books and Supplies

4302	School Supplies	61,889	71,927	93,699	90,905	69,247	62,879	76,465	58,778	58,778	58,778	58,778	58,778	-	820,901	1,003,069	182,168
4305	Software	5,455	1,418	4,435	1,830	6,003	46,287	6,976	9,998	9,998	9,998	9,998	9,998	-	122,394	291,250	168,856
4310	Office Expense	-	1,614	257	236	393	229	1,227	1,538	1,538	1,538	1,538	1,538	-	11,648	22,404	10,756
4311	Business Meals	-	-	-	(481)	481	-	-	333	333	333	333	333	-	1,667	1,120	(546)
4400	Noncapitalized Equipment	-	-	-	-	-	-	54	23,443	23,443	23,443	23,443	23,443	-	117,272	143,296	26,024
		67,343	74,959	98,391	92,490	76,124	109,394	84,722	94,091	94,091	94,091	94,091	94,091	-	1,073,881	1,461,139	387,258

Subagreement Services

5102	Special Education	-	1,237	14,833	9,912	40,546	36,414	43,727	29,373	29,373	29,373	29,373	29,373	-	293,534	330,724	37,189
5106	Other Educational Consultants	10,121	74,059	44,593	92,637	51,994	91,060	118,292	169,232	169,232	169,232	169,232	169,232	-	1,328,918	1,432,956	104,039
5107	Instructional Services	-	-	248,841	82,947	82,947	82,947	82,947	66,515	66,515	66,515	66,515	66,515	-	913,203	1,189,008	275,805
		10,121	75,295	308,268	185,496	175,487	210,421	244,966	265,120	265,120	265,120	265,120	265,120	-	2,535,655	2,952,687	417,032

Operations and Housekeeping

5201	Auto and Travel	-	133	979	877	1,191	-	759	1,233	1,233	1,233	1,233	1,233	-	10,106	17,966	7,860
5300	Dues & Memberships	-	-	160	-	-	-	-	-	-	-	-	-	-	160	6,742	6,582
5400	Insurance	-	2,592	1,296	1,296	1,296	1,296	1,296	2,005	2,005	2,005	2,005	2,005	-	19,097	29,200	10,102
		-	2,725	2,435	2,173	2,487	1,296	2,055	3,238	3,238	3,238	3,238	3,238	-	29,363	78,392	49,029

Facilities, Repairs and Other Leases

5601	Rent	-	-	-	-	-	-	-	-	-	-	-	-	-	-	33,691	33,691
5602	Additional Rent	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1,067	1,067
5604	Other Leases	-	-	-	-	-	-	600	-	-	-	-	-	-	600	-	(600)
		-	-	-	-	-	-	600	-	-	-	-	-	-	600	39,249	38,649

Professional/Consulting Services

5801	IT	-	-	663	-	-	-	-	-	-	-	-	-	-	663	-	(663)
5803	Legal	3,101	2,451	3,500	2,232	-	-	652	1,542	1,542	1,542	1,542	1,542	-	19,644	22,457	2,813
5804	Professional Development	55	-	-	-	-	-	-	-	-	-	-	-	-	55	22,681	22,626
5805	General Consulting	750	750	-	750	2,050	1,000	-	1,318	1,318	1,318	1,318	1,318	-	11,892	16,003	4,111
5806	Special Activities/Field Trips	12,930	14,067	12,837	10,763	3,623	425	838	12,358	12,358	12,358	12,358	12,358	-	117,272	286,591	169,320
5807	Bank Charges	-	-	352	148	103	236	234	234	234	234	234	234	-	2,243	896	(1,347)
5808	Printing	-	-	-	-	10	-	-	-	-	-	-	-	-	10	1,344	1,334
5809	Other taxes and fees	-	-	-	21	-	23	-	-	-	-	-	-	-	44	5,334	5,290
5811	Management Fee	-	-	75,734	25,245	25,245	25,245	25,245	20,244	20,244	20,244	20,244	20,244	-	277,931	361,872	83,941
5812	District Oversight Fee	-	-	-	-	-	-	-	29,101	79,790	2,609	1,567	1,567	123,594	238,227	285,180	46,953
5814	SPED Encroachment	-	-	-	-	-	-	-	8,115	8,115	8,115	8,115	8,115	0	40,573	49,246	8,673
5815	Public Relations/Recruitment	-	-	-	-	-	-	-	-	-	-	-	-	-	-	8,983	8,983
		16,837	17,268	93,086	39,158	31,031	26,929	26,969	72,911	123,600	46,419	45,377	45,377	123,594	708,554	1,067,330	358,776

Monarch River Academy
Monthly Cash Flow/Forecast FY19-20

Revised 2/27/20

ADA = 878.95



Interest

7438 Interest Expense

Total Expenses

Monthly Surplus (Deficit)

Cash Flow Adjustments

Monthly Surplus (Deficit)

Cash flows from operating activities

Depreciation/Amortization

Public Funding Receivables

Grants and Contributions Rec.

Due To/From Related Parties

Prepaid Expenses

Accounts Payable

Accrued Expenses

Cash flows from financing activities

Proceeds from Factoring

Payments on Factoring

Total Change in Cash

Cash, Beginning of Month

Cash, End of Month

	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Year-End Accruals	Annual Forecast	Annual Budget	Favorable / (Unfav.)
Interest																
7438 Interest Expense	-	-	60,762	-	34,492	33,956	1,201	-	-	-	-	27,615	-	158,026	120,400	(37,626)
	-	-	60,762	-	34,492	33,956	1,201	-	-	-	-	27,615	-	158,026	120,400	(37,626)
Total Expenses	278,288	490,571	883,062	628,569	603,992	701,368	663,796	737,715	786,363	708,161	707,119	734,733	123,594	8,047,330	9,913,772	1,866,442
Monthly Surplus (Deficit)	(278,288)	(490,571)	(883,062)	3,864,900	(603,992)	(701,368)	(629,706)	333,744	1,974,750	(519,774)	(553,466)	(581,081)	(349,421)	582,667	425,424	157,243
														7.2%		
Cash Flow Adjustments																
Monthly Surplus (Deficit)	(278,288)	(490,571)	(883,062)	3,864,900	(603,992)	(701,368)	(629,706)	333,744	1,974,750	(519,774)	(553,466)	(581,081)	(349,421)	582,667		
Cash flows from operating activities																
Depreciation/Amortization	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Public Funding Receivables	-	-	-	-	-	-	-	-	-	-	-	-	225,827	225,827		
Grants and Contributions Rec.	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Due To/From Related Parties	155,962	564,234	(2,332,360)	(508,849)	277,081	452,121	(264,176)	-	500,000	501,239	-	(216,607)	-	(871,355)		
Prepaid Expenses	-	(6,673)	-	(16,415)	16,415	(108,192)	108,192	-	-	-	-	-	-	(6,673)		
Accounts Payable	3,681	27,150	29,795	(19,941)	(3,840)	(33,225)	76,171	-	-	-	-	-	123,594	203,384		
Accrued Expenses	123,645	18,521	(50,129)	(6,346)	2,321	(19,563)	19,844	-	-	-	-	-	-	88,293		
Cash flows from financing activities																
Proceeds from Factoring	-	-	3,773,700	-	757,900	749,500	29,500	-	-	-	-	986,240	-	6,296,840		
Payments on Factoring	-	-	-	(3,773,700)	-	-	-	-	(757,900)	(779,000)	-	-	-	(5,310,600)		
Total Change in Cash	5,000	112,662	537,943	(460,352)	445,885	339,273	(660,175)	333,744	1,716,850	(797,535)	(553,466)	188,552				
Cash, Beginning of Month	-	5,000	117,662	655,605	195,253	641,138	980,411	320,236	653,981	2,370,831	1,573,296	1,019,830				
Cash, End of Month	5,000	117,662	655,605	195,253	641,138	980,411	320,236	653,981	2,370,831	1,573,296	1,019,830	1,208,382				

Cert.	Instr.
38.8%	84.2%
(104,440)	364,277

Pupil:Teacher Ratio
25.11 :1

Monarch River Academy

Budget vs Actual

For the period ended January 31, 2020

	Current Period Actual	Current Period Budget	Current Period Variance	Current Year Actual	YTD Budget	YTD Budget Variance	Total Budget
Revenues							
State Aid - Revenue Limit							
LCFF State Aid	\$ -	\$ 1,649,912	\$ (1,649,912)	\$ 4,439,668	\$ 5,041,398	\$ (601,730)	\$ 9,169,545
Education Protection Account	34,090	-	34,090	87,890	106,685	(18,795)	213,370
In Lieu of Property Taxes	-	9,846	(9,846)	-	71,382	(71,382)	123,072
Total State Aid - Revenue Limit	34,090	1,659,758	(1,625,668)	4,527,558	5,219,465	(691,907)	9,505,986
Federal Revenue							
Special Education - Entitlement	-	8,876	(8,876)	-	64,352	(64,352)	110,952
Total Federal Revenue	-	8,876	(8,876)	-	64,352	(64,352)	110,952
Other State Revenue							
State Special Education	-	40,370	(40,370)	-	292,680	(292,680)	504,620
State Lottery	-	-	-	-	-	-	217,637
Total Other State Revenue	-	40,370	(40,370)	-	292,680	(292,680)	722,257
Other Local Revenue							
Interest Revenue	-	-	-	1	-	1	-
Total Other Local Revenue	-	-	-	1	-	1	-
Total Revenues	34,090	1,709,004	(1,674,914)	4,527,559	5,576,497	(1,048,938)	10,339,196
Expenses							
Certificated Salaries							
Teachers' Salaries	168,978	228,875	59,897	1,155,834	1,602,125	446,291	2,746,500
Teachers' Extra Duty/Stipends	22,270	22,888	618	146,268	160,213	13,945	274,650
Pupil Support Salaries	7,726	2,917	(4,809)	50,105	20,417	(29,688)	35,000
Administrators' Salaries	27,708	10,417	(17,292)	211,845	72,917	(138,928)	125,000
Total Certificated Salaries	226,682	265,096	38,414	1,564,051	1,855,671	291,620	3,181,150
Classified Salaries							
Instructional Salaries	3,555	-	(3,555)	21,818	-	(21,818)	-
Total Classified Salaries	3,555	-	(3,555)	21,818	-	(21,818)	-
Benefits							
State Teachers' Retirement System, certificated posit	38,313	44,271	5,958	263,624	309,897	46,273	531,252
OASDI/Medicare/Alternative, certificated positions	220	-	(220)	1,353	-	(1,353)	-
Medicare/Alternative, certificated positions	3,200	3,844	644	22,062	26,907	4,846	46,127
Health and Welfare Benefits, certificated positions	21,834	30,625	8,791	135,312	214,375	79,063	367,500
State Unemployment Insurance, certificated position	7,396	6,003	(1,394)	18,161	13,206	(4,955)	24,010
Workers' Compensation Insurance, certificated posit	2,082	3,711	1,629	14,323	25,979	11,656	44,536
Total Benefits	73,046	88,454	15,408	454,835	590,364	135,529	1,013,425
Books & Supplies							
School Supplies	76,465	100,307	23,842	527,010	471,443	(55,567)	1,003,069
Software	6,976	24,271	17,295	72,403	169,896	97,493	291,250
Office Expense	1,227	1,867	640	3,957	13,069	9,112	22,404
Business Meals	-	93	93	-	653	653	1,120
Noncapitalized Equipment	54	14,330	14,275	54	67,349	67,295	143,296
Total Books & Supplies	84,722	140,868	56,145	603,424	722,410	118,986	1,461,139
Subagreement Services							
Special Education	43,727	27,560	(16,166)	146,670	192,922	46,252	330,723
Other Educational Consultants	118,292	143,296	25,003	482,756	673,489	190,733	1,432,956
Instructional Services	82,947	196,535	113,588	580,630	641,297	60,667	1,189,008
Total Subagreement Services	244,966	367,391	122,425	1,210,056	1,507,709	297,653	2,952,687
Operations & Housekeeping							
Auto and Travel	759	4,491	3,732	3,939	4,491	553	17,966
Dues & Memberships	-	562	562	160	3,933	3,773	6,742
Insurance	1,296	2,433	1,137	9,074	17,033	7,960	29,200
Utilities	-	131	131	-	915	915	1,568
Janitorial Services	-	37	37	-	261	261	448
Communications	-	562	562	-	3,933	3,933	6,742
Postage and Shipping	-	1,573	1,573	-	7,863	7,863	15,725
Total Operations & Housekeeping	2,055	9,789	7,734	13,172	38,430	25,257	78,392

Monarch River Academy

Budget vs Actual

For the period ended January 31, 2020

	Current Period Actual	Current Period Budget	Current Period Variance	Current Year Actual	YTD Budget	YTD Budget Variance	Total Budget
Facilities, Repairs & Other Leases							
Rent	-	2,808	2,808	-	19,653	19,653	33,691
Additional Rent	-	89	89	-	622	622	1,067
Other Leases	600	-	(600)	600	-	(600)	-
Repairs and Maintenance	-	374	374	-	2,620	2,620	4,491
Total Facilities, Repairs & Other Leases	600	3,271	2,671	600	22,895	22,295	39,249
Professional/Consulting Services							
IT	-	-	-	663	-	(663)	-
Audit & Taxes	-	-	-	-	6,743	6,743	6,743
Legal	652	1,871	1,220	11,935	13,100	1,165	22,457
Professional Development	-	2,268	2,268	55	11,341	11,286	22,681
General Consulting	-	1,600	1,600	5,300	8,001	2,701	16,003
Special Activities/Field Trips	838	28,659	27,821	55,483	134,698	79,215	286,591
Bank Charges	234	90	(145)	1,074	448	(626)	896
Printing	-	134	134	10	672	662	1,344
Other Taxes and Fees	-	533	533	44	2,667	2,623	5,334
Management Fee	25,245	59,815	34,570	176,713	195,177	18,464	361,872
District Oversight Fee	-	49,793	49,793	-	156,584	156,584	285,180
SPED Encroachment	-	3,940	3,940	-	28,563	28,563	49,246
Public Relations/Recruitment	-	898	898	-	4,491	4,491	8,983
Total Professional/Consulting Services	26,969	149,602	122,633	251,277	562,485	311,208	1,067,330
Interest							
Interest Expense	1,201	-	(1,201)	130,411	19,600	(110,811)	120,400
Total Interest	1,201	-	(1,201)	130,411	19,600	(110,811)	120,400
Total Expenses	663,796	1,024,471	360,675	4,249,645	5,319,564	1,069,919	9,913,773
Change in Net Assets	(629,706)	684,533	(1,314,239)	277,914	256,933	20,981	425,424
Net Assets, Beginning of Period	907,620			-			
Net Assets, End of Period	\$ 277,914			\$ 277,914			

Monarch River Academy
Statement of Financial Position

January 31, 2020

	Current Balance	Beginning Year Balance	YTD Change	YTD % Change
Assets				
Current Assets				
Cash & Cash Equivalents	\$ 320,236	\$ -	\$ 320,236	0%
Factored Receivable	(1,536,900)	-	(1,536,900)	0%
Due To/From Related Parties	1,655,987	-	1,655,987	0%
Prepaid Expenses	6,673	-	6,673	0%
Total Current Assets	445,996	-	445,996	0%
Total Assets	\$ 445,996	\$ -	\$ 445,996	0%
Liabilities				
Current Liabilities				
Accounts Payable	\$ 79,790	\$ -	\$ 79,790	0%
Accrued Liabilities	88,293	-	88,293	0%
Total Current Liabilities	168,083	-	168,083	0%
Total Liabilities	168,083	-	168,083	0%
Total Net Assets	277,914	-	277,914	0%
Total Liabilities and Net Assets	\$ 445,996	\$ -	\$ 445,996	0%

Monarch River Academy

Statement of Cash Flows

For the period ended January 31, 2020

	Month Ended 01/31/20	YTD Ended 01/31/20
Cash Flows from Operating Activities		
Changes in Net Assets	\$ (629,706)	\$ 277,914
Adjustments to reconcile change in net assets to net cash flows from operating activities:		
Decrease/(Increase) in Operating Assets:		
Grants, Contributions & Pledges Receivable	29,500	1,536,900
Due from Related Parties	(264,176)	(1,655,987)
Prepaid Expenses	108,192	(6,673)
Accounts Payable	76,171	79,790
Accrued Expenses	19,844	88,293
Total Cash Flows from Operating Activities	(660,175)	320,236
Change in Cash & Cash Equivalents	(660,175)	320,236
Cash & Cash Equivalents, Beginning of Period	980,411	-
Cash and Cash Equivalents, End of Period	\$ 320,236	\$ 320,236

Monarch River Academy

Due (To)/From All Inspire Charter School Locations

For the period ended January 31, 2020

	Account Balance
Due (to)/from Inspire LA	\$ (250)
Due (to)/from Feather River Charter School	69
Due (to)/from Blue Ridge Academy	501,239
Due (to)/from Yosemite Valley Charter School	1,371,537
Due (to)/from Inspire Charter Services	(216,607)
Total Due (to)/from Balance	<u>\$ 1,655,987</u>

Monarch River Academy

Accounts Payable Aging

For the period ended January 31, 2020

Vendor Name	Invoice/Credit Number	Invoice Date	Date Due	Current	1 - 30 Days Past Due	31 - 60 Days Past Due	61 - 90 Days Past Due	Over 90 Days Past Due	Total
ABC Piano Studio - Vera Kotenkov	18	1/30/2020	2/29/2020	\$ 865	\$ -	\$ -	\$ -	\$ -	\$ 865
Academy of Creative Education	135MRA	1/13/2020	2/12/2020	1,130	-	-	-	-	1,130
Academy of Creative Education	136MRA	1/14/2020	2/13/2020	2,445	-	-	-	-	2,445
Aikido of Fresno	000F&M-1-20	1/10/2020	2/9/2020	1,230	-	-	-	-	1,230
Alison Weidenheimer	2	1/24/2020	2/23/2020	160	-	-	-	-	160
All About Learning Press, Inc.	901770	1/22/2020	3/22/2020	208	-	-	-	-	208
Amy Spano	10	1/18/2020	2/17/2020	180	-	-	-	-	180
Amy Spano	11	1/18/2020	2/17/2020	1,400	-	-	-	-	1,400
Amy Spano	12	1/18/2020	2/17/2020	1,300	-	-	-	-	1,300
Amy Spano	13	1/18/2020	2/17/2020	1,250	-	-	-	-	1,250
Amy Spano	14	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	15	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	16	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	17	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	19	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	20	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	21	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	22	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	23	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	24	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	25	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	26	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	27	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	28	1/23/2020	2/22/2020	50	-	-	-	-	50
Amy Spano	8	1/18/2020	2/17/2020	687	-	-	-	-	687
Amy Spano	9	1/18/2020	2/17/2020	687	-	-	-	-	687
Aspire Speech & Learning Center	12312019CaP	12/31/2019	1/30/2020	150	-	-	-	-	150
Beautiful Feet Books, Inc.	11484	1/15/2020	3/15/2020	314	-	-	-	-	314
Beautiful Feet Books, Inc.	11487	1/17/2020	3/17/2020	221	-	-	-	-	221
BookShark	30982470	1/8/2020	2/7/2020	360	-	-	-	-	360
BookShark	30982854	1/15/2020	2/14/2020	22	-	-	-	-	22
BookShark	30982992	1/16/2020	2/15/2020	54	-	-	-	-	54

Monarch River Academy

Accounts Payable Aging

For the period ended January 31, 2020

Vendor Name	Invoice/Credit Number	Invoice Date	Date Due	Current	1 - 30 Days Past Due	31 - 60 Days Past Due	61 - 90 Days Past Due	Over 90 Days Past Due	Total
Brave Writer LLC	51542284	1/31/2020	3/1/2020	198	-	-	-	-	198
Break the Barriers, Inc.	11670	1/10/2020	2/9/2020	3,280	-	-	-	-	3,280
Break the Barriers, Inc.	11675	1/24/2020	2/23/2020	2,205	-	-	-	-	2,205
Brenda Myers	9	1/22/2020	2/21/2020	145	-	-	-	-	145
Brian Hammons Piano	326	1/18/2020	2/17/2020	900	-	-	-	-	900
Building Young Leaders, LLC	193	1/21/2020	2/20/2020	49	-	-	-	-	49
Building Young Leaders, LLC	194	1/21/2020	2/20/2020	49	-	-	-	-	49
C'est La Vie Arts	26	1/15/2020	2/14/2020	1,320	-	-	-	-	1,320
California Arts Academy	1677	1/20/2020	2/19/2020	104	-	-	-	-	104
Central California Gymnastics Institute	0014	1/11/2020	2/10/2020	2,238	-	-	-	-	2,238
CheerForce Central Valley	1011	1/21/2020	2/20/2020	149	-	-	-	-	149
Christina Roberts	007	12/16/2019	12/16/2019	-	163	-	-	-	163
Dance Arts	AH-32	1/22/2020	2/21/2020	75	-	-	-	-	75
Dance Arts	CK-30	1/22/2020	2/21/2020	120	-	-	-	-	120
Dance Arts	CK-31	1/22/2020	2/21/2020	180	-	-	-	-	180
Dance Arts	EA-34	1/22/2020	2/21/2020	150	-	-	-	-	150
Dance Arts	ES-29	1/22/2020	2/21/2020	180	-	-	-	-	180
Dance Arts	FH-33	1/22/2020	2/21/2020	75	-	-	-	-	75
Dance Arts	HR-35	1/22/2020	2/21/2020	100	-	-	-	-	100
Denise Voth	VOTH092919	9/29/2019	9/29/2019	-	-	-	-	684	684
Discount School Supply	D55562530101	1/17/2020	2/16/2020	190	-	-	-	-	190
Discount School Supply	P39184830101	1/17/2020	2/16/2020	25	-	-	-	-	25
Discount School Supply	P39186680101	1/17/2020	2/16/2020	32	-	-	-	-	32
E-Therapy, LLC	11177	1/15/2020	2/14/2020	187	-	-	-	-	187
Educational Development Corporation	DIR5404901	1/9/2020	3/10/2020	17	-	-	-	-	17
Educational Development Corporation	DIR5436259	1/22/2020	3/23/2020	23	-	-	-	-	23
Educational Development Corporation	DIR5443284	1/24/2020	3/25/2020	35	-	-	-	-	35
eDynamic Learning	19-1009 CREDIT	1/23/2020	2/22/2020	(170)	-	-	-	-	(170)
Erin Titone	17	1/22/2020	2/21/2020	63	-	-	-	-	63
Fresno Fencing Academy	2290	1/14/2020	1/14/2020	75	-	-	-	-	75
Frieda Yang	202002-Ruminson	1/22/2020	1/22/2020	344	-	-	-	-	344
Global Teletherapy	2957	12/31/2019	1/30/2020	8,498	-	-	-	-	8,498
Grace Note Music Studio	12-62-B	1/16/2020	2/15/2020	1,800	-	-	-	-	1,800
Growing Healthy Children Therapy Serv	IMRA_1912 A1	1/16/2020	2/15/2020	420	-	-	-	-	420

Monarch River Academy

Accounts Payable Aging

For the period ended January 31, 2020

Vendor Name	Invoice/Credit Number	Invoice Date	Date Due	Current	1 - 30 Days Past Due	31 - 60 Days Past Due	61 - 90 Days Past Due	Over 90 Days Past Due	Total
Guido's Martial Arts Academy	Galacia	1/21/2020	2/20/2020	1,134	-	-	-	-	1,134
Guido's Martial Arts Academy	HOPKINS	1/21/2020	2/20/2020	1,134	-	-	-	-	1,134
Guido's Martial Arts Academy	MARQUARDT	1/22/2020	2/21/2020	807	-	-	-	-	807
Hamilton Piano Studio	1350	1/21/2020	2/21/2020	2,160	-	-	-	-	2,160
Hamilton Piano Studio	1351	1/24/2020	2/1/2020	720	-	-	-	-	720
Hamilton Piano Studio	1352	1/24/2020	2/1/2020	900	-	-	-	-	900
Hamilton Piano Studio	1353	1/24/2020	2/1/2020	630	-	-	-	-	630
Home Science Tools	978447A	1/17/2020	3/17/2020	18	-	-	-	-	18
Institute for Excellence in Writing	646835	1/23/2020	2/22/2020	173	-	-	-	-	173
Jenna Hulsey	124	1/18/2020	2/17/2020	600	-	-	-	-	600
Jenna Hulsey	125	1/18/2020	2/17/2020	650	-	-	-	-	650
Jerre Reis	47	1/21/2020	2/20/2020	700	-	-	-	-	700
Jessica Nelson	1139	1/23/2020	2/22/2020	788	-	-	-	-	788
Kevin Freeman	127	1/10/2020	2/9/2020	1,600	-	-	-	-	1,600
Kitchen Kid, LLC	438521502	1/23/2020	2/22/2020	145	-	-	-	-	145
Kitchen Kid, LLC	438521575	1/23/2020	2/22/2020	145	-	-	-	-	145
Kitchen Kid, LLC	438521607	1/23/2020	2/22/2020	145	-	-	-	-	145
Kitchen Kid, LLC	438521644	1/23/2020	2/22/2020	145	-	-	-	-	145
Kitchen Kid, LLC	438521665	1/23/2020	2/22/2020	145	-	-	-	-	145
Laguna Niguel Family YMCA	2020-008119	1/18/2020	2/17/2020	125	-	-	-	-	125
Lakeshore	2316121019	10/11/2019	11/10/2019	-	-	39	-	-	39
Lakeshore	2595931019	10/17/2019	11/16/2019	-	-	105	-	-	105
Lakeshore	2729971019	10/23/2019	11/22/2019	-	-	103	-	-	103
Lakeshore	2729991019	10/23/2019	11/22/2019	-	-	108	-	-	108
Lakeshore	2733861019	10/23/2019	11/22/2019	-	-	30	-	-	30
Learning Without Tears	INV48465	10/9/2019	11/8/2019	-	-	38	-	-	38
Logic of English	INV8496	1/16/2020	2/15/2020	184	-	-	-	-	184
Lotus Educational Services, Inc.	1424	1/20/2020	2/19/2020	225	-	-	-	-	225
Marnie Young	MRA0002	11/30/2019	12/30/2019	380	-	-	-	-	380
Marnie Young	MRA0003	12/31/2019	1/30/2020	420	-	-	-	-	420
Marti Stevens	093	1/23/2020	2/22/2020	245	-	-	-	-	245
Marti Stevens	096	1/23/2020	2/22/2020	735	-	-	-	-	735
Math-U-See Inc.	0592916-IN	1/15/2020	3/15/2020	307	-	-	-	-	307
Math-U-See Inc.	0593063-IN	1/16/2020	3/16/2020	56	-	-	-	-	56
Math-U-See Inc.	0593731-IN	1/22/2020	3/22/2020	258	-	-	-	-	258

Monarch River Academy

Accounts Payable Aging

For the period ended January 31, 2020

Vendor Name	Invoice/Credit Number	Invoice Date	Date Due	Current	1 - 30 Days Past Due	31 - 60 Days Past Due	61 - 90 Days Past Due	Over 90 Days Past Due	Total
Math-U-See Inc.	0593932-IN	1/23/2020	3/23/2020	116	-	-	-	-	116
Math-U-See Inc.	0594030-IN	1/23/2020	3/23/2020	56	-	-	-	-	56
Math-U-See Inc.	0594156-IN	1/24/2020	3/24/2020	82	-	-	-	-	82
Math-U-See Inc.	0594158-IN	1/24/2020	3/24/2020	61	-	-	-	-	61
Mathnasium of North Fresno	6605	1/1/2020	1/31/2020	275	-	-	-	-	275
MEL Science Ltd	AW202001179	1/17/2020	2/16/2020	298	-	-	-	-	298
Moving Beyond the Page	209728	1/16/2020	2/15/2020	560	-	-	-	-	560
Moving Beyond the Page	209954	1/24/2020	2/23/2020	630	-	-	-	-	630
PresenceLearning, Inc.	INV31223	1/8/2020	2/7/2020	1,999	-	-	-	-	1,999
Rainbow Resource Center	2779876	1/2/2020	3/2/2020	161	-	-	-	-	161
Rainbow Resource Center	2825961	12/19/2019	2/17/2020	25	-	-	-	-	25
Rainbow Resource Center	2825968	12/19/2019	2/17/2020	137	-	-	-	-	137
Rainbow Resource Center	2829229	1/2/2020	3/2/2020	74	-	-	-	-	74
Rainbow Resource Center	2829839	1/3/2020	3/3/2020	83	-	-	-	-	83
Rainbow Resource Center	2829840	1/3/2020	3/3/2020	145	-	-	-	-	145
Rainbow Resource Center	2829841	1/3/2020	3/3/2020	208	-	-	-	-	208
Rainbow Resource Center	2829842	1/3/2020	3/3/2020	35	-	-	-	-	35
Rainbow Resource Center	2832931	1/8/2020	3/8/2020	28	-	-	-	-	28
Rainbow Resource Center	2834310	1/10/2020	3/10/2020	31	-	-	-	-	31
Rainbow Resource Center	2834311	1/10/2020	3/10/2020	95	-	-	-	-	95
Rainbow Resource Center	2834884	1/13/2020	3/13/2020	267	-	-	-	-	267
Rainbow Resource Center	2834913	1/13/2020	3/13/2020	246	-	-	-	-	246
Rainbow Resource Center	2835266	1/13/2020	3/13/2020	68	-	-	-	-	68
Rainbow Resource Center	2835271	1/13/2020	3/13/2020	62	-	-	-	-	62
Rainbow Resource Center	2835347	1/13/2020	3/13/2020	53	-	-	-	-	53
Rainbow Resource Center	2835434	1/13/2020	3/13/2020	42	-	-	-	-	42
Rainbow Resource Center	2835435	1/13/2020	3/13/2020	120	-	-	-	-	120
Rainbow Resource Center	2835752	1/14/2020	3/14/2020	35	-	-	-	-	35
Rainbow Resource Center	2837403	1/15/2020	3/15/2020	33	-	-	-	-	33
Rainbow Resource Center	2837411	1/15/2020	3/15/2020	57	-	-	-	-	57
Rainbow Resource Center	2837839	1/16/2020	3/16/2020	154	-	-	-	-	154
Rainbow Resource Center	2838107	1/16/2020	3/16/2020	112	-	-	-	-	112
Rainbow Resource Center	2838189	1/17/2020	3/17/2020	41	-	-	-	-	41
Rainbow Resource Center	2838191	1/17/2020	3/17/2020	158	-	-	-	-	158
Rainbow Resource Center	2838674	1/17/2020	3/17/2020	15	-	-	-	-	15

Monarch River Academy

Accounts Payable Aging

For the period ended January 31, 2020

Vendor Name	Invoice/Credit Number	Invoice Date	Date Due	Current	1 - 30 Days Past Due	31 - 60 Days Past Due	61 - 90 Days Past Due	Over 90 Days Past Due	Total
Rainbow Resource Center	2838690	1/17/2020	3/17/2020	15	-	-	-	-	15
Rainbow Resource Center	2838694	1/17/2020	3/17/2020	15	-	-	-	-	15
Rainbow Resource Center	2838697	1/17/2020	3/17/2020	18	-	-	-	-	18
Rainbow Resource Center	2838698	1/17/2020	3/17/2020	59	-	-	-	-	59
Rainbow Resource Center	2838704	1/17/2020	3/17/2020	109	-	-	-	-	109
Rainbow Resource Center	2838823	1/17/2020	3/17/2020	197	-	-	-	-	197
Rainbow Resource Center	2840888	1/22/2020	3/22/2020	225	-	-	-	-	225
Rainbow Resource Center	2840919	1/22/2020	3/22/2020	51	-	-	-	-	51
Rainbow Resource Center	2841669	1/23/2020	3/23/2020	137	-	-	-	-	137
Rainbow Resource Center	2842096	1/24/2020	3/24/2020	32	-	-	-	-	32
Rainbow Resource Center	2842097	1/24/2020	3/24/2020	31	-	-	-	-	31
Rainbow Resource Center	2842256	1/24/2020	3/24/2020	198	-	-	-	-	198
Rainbow Resource Center	2842328	1/24/2020	3/24/2020	19	-	-	-	-	19
Rainbow Resource Center	2842329	1/24/2020	3/24/2020	112	-	-	-	-	112
Rainbow Resource Center	2842330	1/24/2020	3/24/2020	77	-	-	-	-	77
Rainbow Resource Center	2842331	1/24/2020	3/24/2020	73	-	-	-	-	73
Rainbow Resource Center	2842332	1/24/2020	3/24/2020	77	-	-	-	-	77
Rainbow Resource Center	2842533	1/24/2020	3/24/2020	119	-	-	-	-	119
Reedley School of Music	15	1/3/2020	2/2/2020	518	-	-	-	-	518
Rhonda J Cemo	23	1/23/2020	2/22/2020	80	-	-	-	-	80
Rhonda J Cemo	24	1/23/2020	2/22/2020	360	-	-	-	-	360
Rhonda J Cemo	26	1/23/2020	2/22/2020	80	-	-	-	-	80
Robert Melendez	1079	1/18/2020	2/17/2020	282	-	-	-	-	282
Shirley Winters Ballet	15581	12/18/2019	1/1/2020	159	-	-	-	-	159
Shirley Winters Ballet	15582	12/18/2019	1/1/2020	159	-	-	-	-	159
Shirley Winters Ballet	15584	12/18/2019	1/1/2020	334	-	-	-	-	334
Shirley Winters Ballet	15585	12/18/2019	1/1/2020	230	-	-	-	-	230
Simba School of Music	108	1/26/2020	2/25/2020	420	-	-	-	-	420
Simon Villalobos	21	1/22/2020	2/21/2020	1,200	-	-	-	-	1,200
Singapore Math, Inc.	351026	1/8/2020	2/7/2020	64	-	-	-	-	64
Singapore Math, Inc.	351107	1/14/2020	2/13/2020	66	-	-	-	-	66
SpiritHorse Connections	0304	1/25/2020	1/25/2020	4,905	-	-	-	-	4,905
SpiritHorse Connections	0305	1/25/2020	1/25/2020	230	-	-	-	-	230
Steinway Piano Gallery Of Fresno	65	1/22/2020	2/21/2020	360	-	-	-	-	360
Studies Weekly	288128	1/2/2020	2/1/2020	32	-	-	-	-	32

Monarch River Academy

Accounts Payable Aging

For the period ended January 31, 2020

Vendor Name	Invoice/Credit Number	Invoice Date	Date Due	Current	1 - 30 Days Past Due	31 - 60 Days Past Due	61 - 90 Days Past Due	Over 90 Days Past Due	Total
Studies Weekly	292278	12/18/2019	1/16/2020	33	-	-	-	-	33
Success Learning Center	202-027205	1/27/2020	2/26/2020	600	-	-	-	-	600
Susan Hancock	32	1/24/2020	2/23/2020	780	-	-	-	-	780
Teacher Synergy, LLC	109239749	1/22/2020	2/12/2020	65	-	-	-	-	65
Teacher Synergy, LLC	109264358	1/22/2020	2/12/2020	13	-	-	-	-	13
Teacher Synergy, LLC	109399534	1/23/2020	2/13/2020	29	-	-	-	-	29
Teacher Synergy, LLC	109399964	1/23/2020	2/13/2020	51	-	-	-	-	51
Teacher Synergy, LLC	109497987	1/24/2020	2/14/2020	50	-	-	-	-	50
The Talk Team	62882	1/15/2020	2/14/2020	115	-	-	-	-	115
The Talk Team	62883	1/15/2020	2/14/2020	173	-	-	-	-	173
The Talk Team	62884	1/15/2020	2/14/2020	115	-	-	-	-	115
The Talk Team	62885	1/15/2020	2/14/2020	115	-	-	-	-	115
The Talk Team	62886	1/15/2020	2/14/2020	230	-	-	-	-	230
The Talk Team	62887	1/15/2020	2/14/2020	115	-	-	-	-	115
The Talk Team	62888	1/15/2020	2/14/2020	95	-	-	-	-	95
Timberdoodle.com	310612	12/10/2019	2/8/2020	1,118	-	-	-	-	1,118
Timberdoodle.com	311239	1/6/2020	3/6/2020	898	-	-	-	-	898
Time4Learning	T4W10680	1/10/2020	3/10/2020	119	-	-	-	-	119
Ungers Karate Academy	2944	1/23/2020	2/22/2020	870	-	-	-	-	870
United Conservatory of Music	9835607	1/22/2020	2/21/2020	900	-	-	-	-	900
Wayne Boudreau	4-2019	10/28/2019	11/27/2019	-	-	488	-	-	488
Well Trained Mind Academy	369	1/22/2020	1/22/2020	299	-	-	-	-	299
Wendy DeRaud	160 MRA	1/27/2020	2/26/2020	660	-	-	-	-	660
Yuliya Hess	500	1/25/2020	2/25/2020	900	-	-	-	-	900
Total Outstanding Invoices				<u>\$ 78,032</u>	<u>\$ 163</u>	<u>\$ 911</u>	<u>\$ -</u>	<u>\$ 684</u>	<u>\$ 79,790</u>



Proposal to Provide Audit Services to Monarch River Academy

February 2020

February 26, 2020

Dear Board Members:

We are honored by your request and appreciate the opportunity to submit this proposal to provide audit services for **Monarch River Academy ("Monarch River")**.

We are uniquely qualified to serve your needs and the enclosed proposal will provide more details as to our deep knowledge-base serving independent and charter schools and our commitment to maintain a professional relationship based on proactive and informed services. We strive at all times to do what is in the best interest of our clients.

About Squar Milner

Squar Milner LLP ("Squar Milner") is one of the nation's Top 50 largest accounting firms, as well as one of the largest independent accounting and advisory firms in California. We have locations throughout Northern and Southern California, and an office in the Cayman Islands, which specializes in investment funds. As one of the region's leading professional services firms, our professionals have a broad range of experience. Our full-service concept extends beyond providing a single service and instead delivers extensive comprehensive solutions to a variety of needs.

We are an independent member of Allinial Global, a strong national and international alliance of over 100 independent accounting and consulting firms spanning across over 70 countries. Allinial Global offers international support by connecting member firms to providers and global networks worldwide. Our resources with Allinial Global are comparable to those of any national firm, allowing us to serve and grow with you wherever you do business.

Quality Control

At **Squar Milner**, we are dedicated to professional excellence and working towards the right answer. When presented with an issue, we have the experience to make the most appropriate decision. Our process involves deliberation between the team and senior client management and, when necessary, discussion with our Quality Control Committee. At all times, we are capable of making the decision locally. This not only accelerates the deliberation process, but also provides transparent decision-making.

Our clients appreciate that many of our partners and managers have Big 4 and US national firm experience. This results in a high level of expertise without bureaucratic burdens which often hinder larger firms. **In turn, this means you receive the expertise needed to professionally and efficiently serve your business while avoiding unexpected occurrences or delays often-times associated with larger firms.**

We are committed to quality in everything we do. We are members of the American Institute of Certified Public Accountants ("AICPA") and the California Society of Certified Public Accountants. We are also registered with the Public Company Accounting Oversight Board ("PCAOB").

Our Firm is built upon the fundamentals of providing excellent client service and timely and open communication. **Monarch River** will receive a very experienced high-level team of professionals who are dedicated to the charter schools industry.

Our service approach is predicated on serving **Monarch River** with attention and dedication. Consequently, we will devote the necessary resources to ensure that we exceed your service needs. Your client service team will be comprised of technically proficient and service-oriented individuals committed to meeting your needs on a daily basis.

At **Squar Milner**, *we do not make excuses*. We provide extraordinary client service.

Summary

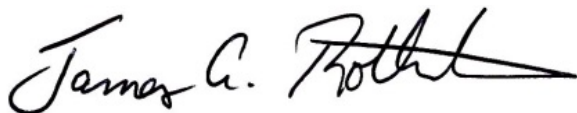
Overall, we pledge that **Monarch River** will be a client of utmost importance to us. At **Squar Milner**, we care about your success and will dedicate the attention and time of experienced, senior-level professionals to serve your specific needs. We stand prepared to continue working with **Monarch River** and delivering exceptional client service. If any additional questions remain, do not hesitate to contact us.

The accompanying proposal contains details regarding our team, references and the credentials of **Squar Milner**. It also describes the recognition we have garnered from our peers, regulatory bodies and the profession at large.

We appreciate the opportunity to submit this proposal and respectfully offer **Squar Milner** for your careful consideration.

Respectfully yours,

SQUAR MILNER LLP



James Rotherham
Partner, Audit Services

Table of Contents

Understanding of Your Needs.....	5
Independent & Charter Schools Industry Expertise.....	6
Our Audit Practice and Process.....	7
The Audit: Five Step Implementation	8
Client Services Team	9
Professional Fees	10
Appendix	11
References	12
Client Services Team	13
AICPA 2016 Peer Review Report.....	16

Understanding of Your Needs

We understand that Monarch River needs a provider with the following qualifications to meet your needs:

- ✓ A full service accounting firm with extensive experience serving independent and charter schools;
- ✓ Timely and decisive feedback on key accounting matters;
- ✓ Consultative with technical developments and emerging issues;
- ✓ Risk-focused;
- ✓ Cost conscious;
- ✓ Exceptional client service.

We have taken these observations into consideration as we believe they are essential to helping achieve **Monarch River's** goals. We know every client is unique and that you need a firm who can identify and respond to your specific needs. Your **Squar Milner** team is committed to proactively addressing your issues and concerns.



Independent & Charter Schools Industry Expertise

Squar Milner has a team of professionals with significant experience in serving independent and charter schools. Our qualifications include tuition payment plans, deferred revenue, scholarships, faculty compensation plans, summer programs, capital campaigns, parent pledge programs and endowment funds. At **Squar Milner**, we also understand the need for sustaining enrollment, the importance of reliable data to plan for the future, changing demographics, increased competition, and fluctuation in enrollment that can have an adverse impact if not planned for in advance. Our dedicated professionals have extensive backgrounds serving on school boards which helps provide additional perspective to offer observations and recommendations most beneficial to you.

You can expect to be served by a team of qualified professionals who:

- Have significant experience servicing not-for-profit organizations, charter schools and independent schools
- Meet with you frequently and are available when needed
- Meet your specific audit and tax needs through our consultative approach to communicating technical developments and issues as they arise
- Commit to developing long-term relationships
- Have a thorough understanding of your business

The following are a sample of independent and charter schools that **Squar Milner** has served:

- | | |
|-----------------------------------|---------------------------------------|
| ▪ Bay Area Educational Institute | ▪ Plumas Charter School |
| ▪ Charles Armstrong School | ▪ Presidio Preschool |
| ▪ Discovery Charter School | ▪ REACH Leadership Academy |
| ▪ Escuela Popular | ▪ RePublic Schools Nashville |
| ▪ KEY Academy | ▪ Ronald C. Wornick Jewish Day School |
| ▪ Memphis Delta | ▪ Seven Hills School |
| ▪ Montclair Community Play Center | ▪ Strive Collegiate |
| ▪ Nashville Classical | ▪ Town School for Boys |



Our Audit Practice and Process

We go beyond a simple audit of financial statements. We believe a well-planned and properly conducted audit engagement can provide valuable insight into operational efficiencies, internal control weaknesses and business opportunities. To that end, our audits are designed to be a springboard for improved internal controls and procedures, as well as sound and proactive business and tax insight.

Audit Approach

Squar Milner performs audits quickly and thoroughly, while providing meaningful comments regarding your business and controls. We aim to complete the audit in a timely manner with minimal disruption to your business operations.

Squar Milner employs a risk-based audit approach, focused on the areas of greatest concern in your business. We will meet with you to discuss our understanding of the critical audit areas and develop a mutually agreed-upon timeline and audit plan to ensure that your needs are addressed.

Strategy for Initial Audit

Our approach is to dedicate a liberal amount of partner and manager time up front to properly identify issues, understand history and plan the engagement. It is imperative for partners and managers to gain this knowledge personally. Transition is where experience counts. With a focused and experienced team, we can get up-to-speed quickly.

Technology

We will maximize the functionality of computerized technology and audit software. Our audit workpapers are prepared and maintained in digital formats, thereby allowing us to achieve greater efficiency and utilize state-of-the-art electronic audit tools. We will work closely with your personnel in order to obtain the necessary documentation in electronic form.

Pre-Audit Planning

Our approach emphasizes planning and taking proactive action in order to anticipate issues and prevent surprises. Each year, as part of the audit planning process, we will meet with your key financial and executive managers to understand your strategic goals and objectives, business plan and critical areas of focus and risk that we believe to be important. These sessions are vital and will:

- Facilitate team building and co-development of expectations;
- Validate our understanding of key strengths and weaknesses of your organization and current systems;
- Refine the timeline and audit plan to ensure key objectives are met in a timely fashion;
- Define risk areas and specific issues; and
- Leverage internal resources to minimize audit costs and optimize efficiencies.

Audit Practice

Please refer to the Audit Five Step Implementation on the following page.

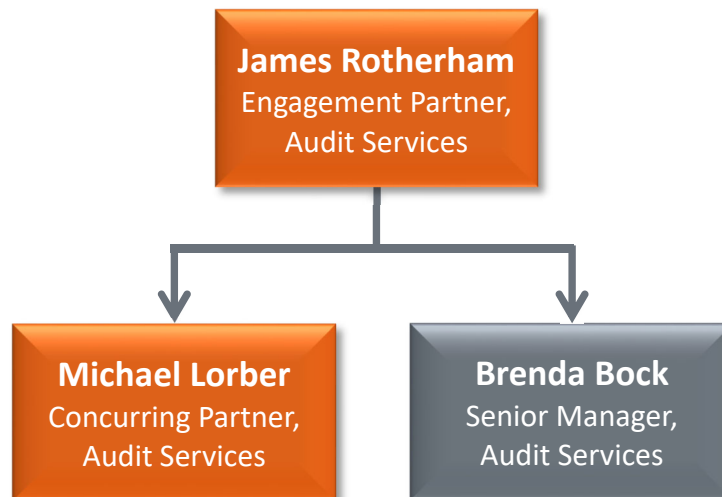
Management Letter

When preparing our management letters, we identify methods of strengthening internal control and operating efficiency. We may include new or pending accounting, audit or tax developments that would be of significance. We will review all potential comments with management and permit sufficient time to review our comments to ensure that the context is appropriate and accurate. This collaborative effort will result in a letter focused on opportunities rather than deficiencies.

The Audit: Five Step Implementation



Client Services Team



Our Firm is built upon the fundamentals of providing extraordinary client service and timely and open communication with your management team. **Monarch River** will receive a very experienced high-level team of professionals.

Our engagement plans incorporate a significant amount of partner and manager time. This structure is intentional – not a coincidence. Our goal is to provide the technical expertise demanded of a national CPA firm, combined with the high level of personal service and reasonable rates offered by a regional accounting firm.

At **Squar Milner**, we believe our biggest investments are our client relationships and our people. The two investments are interrelated. We invest significantly in our people, as we believe they are our biggest asset and the key to our success. We do our best to retain our professionals by making sure they have a work-life balance. We are very proud of the group of professionals we have today. We take pride and ownership in our work. Excellence in servicing our clients is one of the top job requirements for each of our professionals; frequent interaction with our clients is a top priority.

For more detailed information on your client service team, please see their full bios in the Appendix.

Professional Fees

Based on the information we were provided, we estimate our professional fees, excluding out-of-pocket costs and our standard administrative fee of 8%, to be as follows:

Services	Estimated Fees
Audit of the financial statements for Monarch River Academy for the year ending June 30, 2020.	\$17,995

Assumptions:

- Complete cooperation and access to books and records. **Monarch River's** management prepares all requested schedules and obtains all information requested in a timely manner.
- Scope of business and existing reporting requirements under current rules and regulations set forth by regulatory bodies will not significantly change.
- Full access to predecessor workpapers will be granted.
- Internal controls are designed effectively and are functioning properly.

Our fee estimate is based on standard hourly rates of our professional staff and assume a normal level of client assistance and the assumptions above. If these assumptions are incorrect, the scope of our work could increase resulting in higher fees. Additionally, if we encounter a situation that may result in additional work, we will obtain your advanced approval before undertaking any work. Our fees will be billed as our work progresses and all fees must be paid in full prior to the release of our report.

We understand that you are operating in a rapidly changing environment and the accounting rules are changing as fast as your business. We work closely with our clients to address the accounting impact of changes to their business. We do not charge clients for routine calls to discuss accounting related matters. For questions involving research or other services, we will provide a fee estimate in advance before undertaking special assignments. The discussions that we have throughout the year result in a better understanding of your business and help us to perform our work more efficiently.

This proposal is being submitted in advance of our completion of certain engagement acceptance procedures including background checks for directors and officers and our acceptance of your appointment of **Squar Milner** is conditional upon the satisfactory completion of these procedures.





Appendix



References

Amethod Public Schools	Partnerships to Uplift Communities Schools	ROADS Education Organization dba Pivot Charter Schools
Jorge Lopez CEO 510.436.0172	Lisa Tover CFO 818.559.7699	Jayna Gaskell Executive Director 707.843.4676



Client Services Team



Jim Rotherham **Partner-in-Charge, Education Services**

Area of Focus

Jim Rotherham is an Audit Partner at Squar Milner and has over 32 years of experience in public accounting and private industry. Jim heads up the Education Services practice at Squar Milner and specializes in audits of charter schools, school districts, local governments, Native American tribal governments and casinos, and not-for-profit organizations. He has extensive experience working with companies ranging from start-up stage to established public companies.

Business Experience

Jim's background includes over 12 years at Ernst & Young in San Diego servicing clients in the technology and life sciences sector as well as governmental and nonprofit organizations. He co-founded and served as Chief Financial Officer of several privately owned and venture backed tech companies, including one which he took public in 2003. Jim returned to public accounting in 2007 and built one of the most successful San Diego based full service CPA firms which merged with Squar Milner in 2016.

Professional License and Accreditation

- Certified Public Accountant – California, Florida, and New York
- Member, American Institute of Certified Public Accountants
- Member, California Society of Certified Public Accountants

Education

- Bachelor of Science – The Wharton School, University of Pennsylvania (Honors)





Michael H. Lorber

Partner, Audit Services

Area of Focus

Michael H. Lorber is a Partner in Squar Milner's Audit and Assurance Services Department. He joined the firm in January 2005. Michael serves as engagement or concurring partner on a wide variety of public company and private sector audit clients. His clients include companies in a number of industries including manufacturing and distribution, technology, life science, renewable energy, medical devices and not-for-profit. He has extensive experience working with companies ranging from development or early-stage entities to established SEC registrants. In addition, Michael is one of the firm's Employee Benefit Plan audit specialists, where he serves as engagement or concurring partner for a number of 401k Plan, or other Benefit Plans, with audit requirements from the Department of Labor.

Michael's blend of public accounting and private sector financial management experience establishes the foundation for his valuable perspective and ability to provide quality audit services with a focus and priority on clear and open communication and customer service.

Business Experience

Michael has over 35 years of diversified business and financial management experience that includes both Big 4 public accounting and private industry. He started his career as an auditor with Deloitte, and has served as chief financial officer or controller for several public and private sector companies in a variety of industries including life sciences, medical devices, financial services, defense contracting and manufacturing/distribution, prior to his return to the public accounting profession in 2005.

Professional License and Accreditation

- Certified Public Accountant, California
- Member, American Institute of Certified Public Accountants
- Member, California Society of Certified Public Accountants

Education

- Bachelor of Science, Accounting – University of Illinois

Civic Activities

- Board Member, Day for Change
- Audit Committee Member, San Diego Humane Society
- Board Member, Business Executives Council
- Member, CFO Roundtable, San Diego





Brenda Bock

Senior Manager, Audit Services

Area of Focus

Brenda Bock is an Audit Senior Manager at Squar Milner and has over 13 years of experience in public accounting and private industry. Brenda specializes in audits of charter schools, school districts, local governments, Native American tribal governments and casinos, and not-for-profit organizations.

Business Experience

Prior to joining Squar Milner, Brenda worked for nine years at Rothstein Kass servicing clients in the hedge fund and financial services industries. Brenda also worked at Bank of New York Mellon as an internal auditor for over 20 asset managers. Brenda returned to public accounting in 2014 helping to develop the audit department at Hosaka, Rotherham & Company, which merged with Squar Milner in 2016.

Professional License and Accreditation

- Certified Public Accountant, California and New Jersey
- Member, American Institute of Certified Public Accountants
- Member, California Society of Certified Public Accountants
- Member, New Jersey Society of Certified Public Accountants

Education

- Bachelor of Arts, Economics and Spanish – Rutgers University
- Master of Business Administration, Accounting – Montclair State University





AICPA 2016 Peer Review Report





Peer Review Program

Administered by the National Peer Review Committee

American Institute of CPAs
220 Leigh Farm Road
Durham, NC 27707-8110

June 01, 2017

Stephen Milner
Squar Milner, LLP
1661 Alton Pkwy
Irvine, CA 92606 4801

Dear Stephen Milner:

It is my pleasure to notify you that on May 24, 2017, the National Peer Review Committee accepted the report on the most recent System peer review of your firm. The due date for your next review is December 31, 2019. This is the date by which all review documents should be completed and submitted to the administering entity.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Thank you for your cooperation and support of the profession's practice-monitoring programs.

Sincerely,

Michael Fawley
Chair - National PRC
nprc@aicpa.org 919-402-4503
National Peer Review Committee

CC: Candace Wright, Ernest Miranda

Firm Number: 900010080880

Review Number: 462500





Report on the Firm's System of Quality Control

To the Partners of
Squar Milner LLP
and the National Peer Review Committee

We have reviewed the system of quality control for the accounting and auditing practice of Squar Milner, LLP (the firm) applicable to engagements not subject to PCAOB permanent inspection in effect for the year ended June 30, 2016. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at www.aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of the system of quality control and the firm's compliance therewith based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including compliance audits under Uniform Guidance; audits of employee benefit plans, and examinations of service organizations [SOC 1 and SOC 2 engagements].

As part of our peer review, we considered reviews by regulatory entities as communicated to the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Squar Milner, LLP applicable to engagements not subject to PCAOB permanent inspection in effect for the year ended June 30, 2016, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)* or *fail*. Squar Milner, LLP has received a peer review rating of *pass*.

Postlethwaite & Nettville

Baton Rouge, Louisiana
January 13, 2017



**CONTRACT FOR ANNUAL AUDIT
OF K-12 CHARTER SCHOOLS
(Three Year Contract)**

MONARCH RIVER ACADEMY

This contract entered into this 19th day of February, 2020, between MONARCH RIVER ACADEMY of San Diego County, California, hereinafter called the School and Wilkinson Hadley King & Co. LLP hereinafter called the Accountant, witnesses that the parties hereto do mutually agree as follows:

Article 1. EMPLOYMENT OF ACCOUNTANT: The School, pursuant to Chapter 3 (commencing with Section 14500), Part 9, Division 1, Title 1, and Article 2 (commencing with Section 41020), Chapter 1, Part 24, Division 3, Title 2 of the Education Code of the State of California, hereby employs the Accountant to perform the necessary professional services, including but not limited to, those hereinafter set forth in connection with an audit of the books and accounts of the School.

Article 2. SCOPE OF AUDIT: The audit shall include all financial information of the School including the student body accounts, and any other funds under the control or jurisdiction of the School.

Article 3. AUDIT PERIOD: The audit shall cover the period of the 2019-20 through 2021-22 school years, to wit, the period commencing July 1, 2019, and ending June 30, 2022.

Article 4. VERIFICATION OF PRIOR YEAR'S FUNDS BALANCES: The audit shall include a verification of fund balances at the beginning of the audit period, provided there has been a responsible audit for the year prior to commencement of the audit period, from which such verification can be made; otherwise such verification may be excluded at the discretion of the School.

Article 5. AUDIT PROCEDURES: The audit shall be performed in accordance with general accounting office standards for financial and compliance audits, and shall include, to the extent applicable, the audit procedures recommended by the Education Audit Appeals Panel, as detailed in the most recent publication entitled Standards and Procedures for Audits of California Local Educational Agencies (Audit Guide). The Accountant shall provide the State Controller access to audit working papers to permit the Controller to complete a review upon request pursuant to Education Code Section 14504.

Article 6. FORM AND CONTENTS OF REPORT: The form and contents of the audit report shall be in conformity, to the extent practicable, with such form and content as may be prescribed by the State Controller under Section 41020 of the Education Code.

Article 7. EXTRA WORK AND SERVICES: In the event that circumstances disclosed by the audit indicate that more detailed verification is required in addition to that which would be sufficient under ordinary circumstances, the Accountant shall at once notify the School in writing of the fact, together with a written estimate of the additional work and services required and the estimated cost thereof. In the event the School authorizes and approves the performance of such extra work and services, it shall so notify the Accountant in writing. No claims of the Accountant for extra work or services shall be allowed or paid without such written consent and approval of the School first having been so obtained before such extra work and services are entered upon or undertaken.

Article 8. COMMENCEMENT OF WORK: Work by the Accountant under this contract shall commence April 20, 2020, or as soon thereafter as the School may deem practicable and feasible.

Article 9. COMPLETION AND DELIVERY OF REPORT: The audit report shall be completed and delivered to the School not later than December 15 annually. The Accountant will furnish the charter school copies of the audit in sufficient number for distribution to each member of the governing board plus 10 copies for the School's chief administrative officer and shall mail one copy to each of the following: County Superintendent of Schools, State Department of Education, State Controller's office.

Article 10. THE ACCOUNTANT FEES: The School agrees to pay and the Accountant agrees to accept for performance of all services rendered herein, exclusive of extra work and services, a fee in the sum of, not to exceed amounts notated below. It is understood and agreed that said fee is a maximum fee and is subject to corresponding reduction in the event that the actual cost of making the audit proves to be less than is now estimated at the time of entering into this contract. The cost estimates, which include a reasonable profit and constitute the basis upon which the maximum fee has been determined.

	SCHOOL AUDIT	INFORMATION RETURNS	TOTAL FEES
2019-20	\$8,500	\$1,200	\$9,700
2020-21	\$8,750	\$1,200	\$9,950
2021-22	\$9,000	\$1,200	\$10,200

Extra work and services duly ordered and approved as herein above provided and duly performed shall be computed and paid for at the rates below.

<u>Classification</u>	<u>Rate</u>
Senior Partner	\$ 175
Partner	\$ 150
Senior Manager	\$ 125
Manager	\$ 100
Senior Accountant	\$ 85
Staff Accountant	\$ 70
Clerical	\$ 45

Article 11. PAYMENT: Payment of ninety percent of the fee, including extra work and services, shall be made in progress payments as work is completed. The Accountant shall furnish the School on demand an itemized statement of the audit costs, if requested. The final ten percent of the value of work done under this contract shall be made after certification by the State Controller that the audit report conforms to the reporting provisions of the Audit Guide. Provision is hereby made to withhold fifty percent of the audit fee for any subsequent year of a multi-year contract if the prior year's audit report by the same firm or individual failed to be certified as conforming to reporting requirements of the State Controller's Audit Guide.

Article 12. TERMINATION: The School hereby reserves the right to terminate this contract at any time. In the event of such termination, the Accountant shall be paid the reasonable value of all services rendered up to the date of such termination as may be determined by the School, and the Accountant hereby expressly waives any and all claims for damages or compensation arising under this contract, except as set forth herein, in the event of such termination. Additionally, this contract shall become null and void if the audit firm or individual is declared ineligible to perform LEA audits pursuant to Education Code Section 41020.5.

Article 13. ASSOCIATES: The Accountant shall have the option, with the written consent of the School, to associate with them and at their expense accountants or other qualified persons to render services in connection with the work, and to delegate to them such duties as they may delegate without relieving themselves from administrative or other responsibility under this contract.

Article 14. SUCCESSORS AND ASSIGNS: All terms, conditions, and provisions hereof shall inure to and shall bind the parties hereto, their, and each of their respective heirs, executors, administrators, successors, and assigns.

Except as provided above, the Accountant shall not sublet, assign, or transfer their interest in this contract without the written consent of the School.

Article 15. Workers' Compensation: We are aware of the provisions of Section 3700 of the Labor Code that requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that Code, and we will comply with such provisions before commencing the performance of the work of the contract.

Article 15. INSTRUCTIONS TO PROCEED: The Accountant is not to proceed with performance of any services under this contract without first securing written authorization from the School to do so.

IN WITNESS WHEREOF, we have hereunto set our hands the day and year first above written.

Wilkinson Hadley King & Co. LLP MONARCH RIVER ACADEMY
of Tulare County, California

Accountant

By 
Kevin Sproul, Partner

By _____

Dated: February 19, 2020

Approved by the Governing Board

On _____

MEMORANDUM OF UNDERSTANDING FOR PERSONNEL SERVICES

This Memorandum of Understanding for Personnel Services (“**MOU**”) is entered into as of July 1, 2019 (“**Effective Date**”) by and between the following California nonprofit public benefit corporations, which may each be referred to herein as a “**Party**” or collectively as the “**Parties**” to this MOU: **Blue Ridge Academy, Mission Vista Academy, Granite Mountain Charter School, Triumph Academy, Heartland Charter School, Clarksville Charter School, Feather River Charter School, Cabrillo Point Charter School, The Cottonwood School, Lake View Charter School, Winship Community School, Pacific Coast Academy, Yosemite Valley Charter School and Monarch River Academy.**

WHEREAS, Triumph Academy operates Triumph Academy, Heartland Charter School operates Heartland Charter School, Clarksville Charter School operates Clarksville Charter School, Feather River Charter School operates Feather River Charter School, Cabrillo Point Charter School operates Cabrillo Point Charter School, The Cottonwood School operates The Cottonwood School, Lake View Charter School operates Lake View Charter School, Winship Community School operates Winship Community School, Yosemite Valley Charter School operates Yosemite Valley Charter School, Granite Mountain Charter School operates Granite Mountain Charter School, Blue Ridge Academy operates Blue Ridge Academy, Pacific Coast Academy operates Pacific Coast Academy, Mission Vista Academy operates Mission Vista Academy, Monarch River Academy operates Monarch River Academy, and Granite Mountain Charter School operates Granite Mountain Charter School (each a “School**” or collectively the “**Schools**”);**

WHEREAS, Schools are nonclassroom-based public charter schools using the same educational model dedicated to providing students with a flexible personalized learning experience that empowers families to tailor a program designed around the specific needs of each student.

WHEREAS, each School employs certificated teachers designated as having the responsibility for the general supervision of their students’ independent study pursuant to Education Code § 51747.5(a).

WHEREAS, Education Code § 51749.5(a)(3) authorizes nonclassroom-based charter schools, like the Schools, to enter into a memorandum of understanding for personnel services with other charter schools, school districts, or county offices of education whereby one charter school can lease its certificated teachers to provide instructional services to another charter school.

WHEREAS, the Schools’ respective education programs are geared towards sharing instructional staff because they have similar curricula and allow staff to instruct and supervise students from remote locations.

WHEREAS, the Schools desire to use the flexibility afforded under Education Code § 51749.5(a)(3) to share instructional personnel because this will further the Schools’ shared goal to successfully implement their education programs in an efficient and cost effective manner.

WHEREAS, it is the intent of the Parties to lease personnel amongst each other according to the terms and conditions set forth in this MOU.

NOW, THEREFORE, in consideration of their mutual promises set forth in this MOU, the Parties desire to, and hereby agree as follows:

1. Leased Employees. During the term of this MOU, the Parties may lease credentialed general education teachers and other instructional support staff, such as special education staff, to perform

the Services (“Services”) set forth in Attachments A and B. The term “**Leased Employee**” shall refer to any employee leased between the Parties pursuant to this MOU.

2. Lessor and Lessee Schools. The Parties acknowledge each School may both (i) employ an individual who will provide educational services to another School; and (ii) receive educational services from an individual employed by another School. The term “**Lessor School**” refers to a School leasing its employee(s) to another School pursuant to the terms of the MOU. The term “**Lessee School**” refers to a School receiving instructional services from another School’s employee(s) pursuant to the terms of the MOU. Each Party may serve as a Lessor School and Lessee School under this MOU, and shall meet the obligations set forth in this MOU dependent on their role as a Lessor School and/or Lessee School.

a. **Assignment of Leased Employees.** Lessee School and Lessor School shall collaborate on determining which Leased Employees will be assigned to Lessee School. As Lessor School is the employer of its Leased Employees, Lessor School retains sole discretion in the assignment of Leased Employees. Lessee School is responsible for assigning its students to Leased Employees. Lessor School and Lessee School shall work together to appropriately memorialize Leased Employees under this MOU, including dates of service and numbers of students served.

3. Fees. The fees to be paid by Lessee School to Lessor School for the services provided by Leased Employees are calculated based on the specific services provided the staff:

a. **Attachment A: Personnel Leasing Calculated by Number of Students Served.** Lessor School shall lease credentialed teachers performing the functions described in Attachment A for a Lessee School. Lessee Schools shall be charged based on the number of students served by each Leased Employee. The amount charged per student is **\$291**.

b. **Attachment B: Personnel Leasing at a Flat Rate.** Instructional support staff performing the functions described in Attachment B shall be charged at a hourly rate. The costs for leasing these employees do not fluctuate based on the numbers of students served. The cost-per-personnel is equal to: **Attachment B**.

4. Monthly Invoices. Lessor School will provide an invoice to a Lessee School for the fees set forth in Section 3 of this MOU on a monthly basis. Lessee School shall pay invoices within thirty (30) days of receipt. Lessee School shall be provided access to reasonable backup documentation for such costs upon request.

5. Lessor School Responsibilities:

- a. Comply with all applicable federal and state statutes, laws and regulations.
- b. Lessor School shall ensure Leased Employees who serve as supervising teachers retain the credentials necessary to comply with Education Code §§ 47605(l) and 51747.5(a) and the Lessee School’s charter petition (“Charter Petition”). Lessor School shall also ensure Leased Employees have undergone a tuberculosis risk assessment and/or testing prior to commencing services to Lessee School to the extent required by the Charter Petition and applicable law.
- c. Lessor School shall ensure that all Leased Employees providing Services to the Lessee School under this MOU receive required training, including, but not limited to initial and annual training on mandated child abuse or neglect reporting.

d. Lessor School shall ensure that (i) all Leased Employees providing Services under this MOU have been cleared for employment through the Department of Justice in compliance with the Charter Petition and applicable law; and (ii) no Leased Employee has been convicted of a serious or violent felony (as defined by Penal Code § 667.5 and § 1192.7)

e. Lessor School agrees that it is the sole and exclusive employer of Leased Employees performing Services at a Lessee School under this MOU. Lessor School shall supervise and make all employment decisions with respect to its employees in its sole discretion, including all hiring, evaluation, termination, compensation and benefits decisions. Lessor School will be responsible for the supervision of its employees, subject to input from the Lessee School.

f. Lessor School may terminate the assignment of a Leased Employee from a Lessee School in its sole discretion. Lessor School shall endeavor to provide as much notice as practicable to the Lessee School before terminating the assignment of a Leased Employee.

6. Lessee School Responsibilities:

a. Comply with all applicable federal and state statutes, laws and regulations, including laws applicable to charter schools offering independent study.

b. Lessee School is responsible for ensuring the education program and curriculum complies with the Charter Petition. Lessee School shall provide technical assistance and other support to Leased Employees to help ensure the Services align with the Charter Petition.

c. Lessee School shall have the right to supervise Leased Employees' activities while they are on assignment to Lessee School to ensure they are meeting their performance obligations. In addition to any obligations set forth by Lessor School as their employer, while performing Services to support Lessee School, Leased Employees shall abide by and be subject to applicable policies and procedures adopted by Lessee School.

d. With Lessor School's permission, Lessee School may participate with Lessor School in the hiring, evaluation, compensation, and discipline decisions concerning Leased Employees. Lessee School may unilaterally, upon providing written notice to Lessor School, remove a Leased Employee assigned to Lessee School. Upon providing such notice, Lessee School may collaborate with Lessor School (or another School) to assign a different Leased Employee to support the Lessee School as necessary.

e. Lessee School shall make available to Lessor School, in a timely manner, all data, files, documentation, or other information necessary or appropriate for the performance of the Services. Lessee School will be responsible for, and Lessor School shall be entitled to rely upon, the content, accuracy, completeness, and consistency of all such data, materials, and information.

f. Provide to Lessor School, in writing, copies of any school-specific rules and or regulations applicable to Lessor School while providing services to Lessee School.

g. Lessee School shall provide a safe working area for Leased Employees when necessary for Leased Employees to be on a Lessee School location.

h. Provide feedback to Lessor School regarding Leased Employees' performance.

7. Relationship Between Lessor and Lessee Schools.

a. Leased Employees are, and shall remain, the employees of the Lessor School, and shall be subject to the ultimate direction and control of Lessor School and its governing board, officers, and other representatives. The termination of this MOU shall not terminate the employment relationship of any Leased Employee with Lessor School. Nothing in this MOU shall confer upon any Party any rights or remedies, including any right to employment, as an employee of any other Party.

b. Lessor School shall have full and sole legal control over and responsibility for payment of all compensation and benefits to Leased Employees, including retirement benefit system contributions (e.g., STRS, as applicable), as well as the full and sole responsibility for ensuring compliance with any and all applicable state and federal income tax withholding, state and federal unemployment and disability insurance withholding and contributions, wage and hour obligations, social security tax withholding and contributions, and other applicable employment law requirements. Assuming Lessor School participates in CalSTRS, the Parties acknowledge Leased Employees are employees of the Lessor School for CalSTRS purposes.

c. Lessor School shall each be responsible for its compliance with workers' compensation coverage obligations, wage and hour obligations, and any other applicable federal or state employment laws. Pursuant to Labor Code section 3602, Lessor School agrees to retain workers' compensation coverage for all Leased Employees for the duration of their support to as Lessee School. Lessor School shall ensure the Leased Employees have proper and necessary insurance coverage when working for Lessee School and shall provide evidence of such coverage to the Lessee School upon request.

8. Term and Termination. The term of this MOU commences on July 1, 2019 and continues through June 30, 2020, and shall then automatically renew for consecutive one (1) year terms, unless and until earlier terminated as set forth in subsection (a) herein and subject to any amendments pursuant to Section 9 herein.

a. ***Termination Without Cause.*** Any Party may terminate its participation in this MOU for any reason upon sixty (60) days' written notice to all Parties. Termination of participation by any Party(ies) shall not terminate the MOU as to any other Party, nor relieve the terminating Party(ies) of any obligations incurred prior to the effective date of such termination. Following termination of a Party's participation in the MOU, (i) the terminating Party shall pay Lessor School(s) any unpaid portion of fees owed through the effective date of termination; and (ii) the other Party(ies) shall pay the terminating Party (if it served as a Lessor School) for Services provided before the effective termination.

9. Amendments. This MOU may be amended as follows:

a. ***Changes in the Law.*** In the event that any new enactment, repeal, or change of any federal, state, or local law, regulation, interpretation of law or regulation by an authorizer or regulator, or court or administrative decision or order materially affects the performance of any of the Parties in conformity with this MOU, the Parties shall promptly commence negotiations in good faith regarding a mutually agreeable approach (including without limitation, an amendment to the MOU) to address the changes. If, despite such good faith negotiations, the Parties are unable to agree upon an acceptable approach, the MOU shall terminate for all Parties without further obligation or liability among the Parties, upon any Party's sixty (60) days' written notice to the other Parties, or in such lesser time as is reasonable under the circumstances. If termination occurs for reasons set forth in this subsection, Parties are responsible for paying fees as set forth in Section 8(a).

a. ***Mutual Agreement.*** The Parties may amend this MOU with mutual written consent of all Parties.

10. Work Product; Intellectual Property. Any work product that is created by Lessor School, including by any Leased Employee, in the context of providing Services shall be the property of that Lessor School. Any intellectual property owned by a Lessee School and used by a Lessor School related to the Services shall remain the property of that Lessee School. Similarly, any intellectual property owned or created by a Lessor School, including by any of the Leased Employees, that is utilized as part of providing the Services shall remain the property of Lessor School. No Party shall have the right to grant a license, sublicense, or any other use or rights to the property of another Party. Upon termination or expiration of this MOU, the property of each Party in the possession of any other Party shall be returned and/or destroyed.

11. Confidentiality. Each Party acknowledges that during the term of this MOU, it may have access to certain Confidential Information of the other Party(ies), as defined below. Each Party shall maintain and enforce reasonable administrative, technical, and physical safeguards to reasonably protect the confidentiality of the other Parties' Confidential Information.

a. **"Confidential Information"** means non-public information marked either "confidential" or "proprietary," or that otherwise should be understood by a reasonable person to be confidential in nature. Confidential Information may include but is not limited to trade secrets, policies, procedures, student education records, intellectual property, business or strategic plans, contractual arrangements or negotiations, financial information and employee information. Confidential Information does not include any information which (i) is rightfully known to the recipient prior to its disclosure; (ii) is released to any other person or entity (including governmental agencies) without restriction; (iii) is independently developed by the recipient without use of or reliance on Confidential Information; (iv) is or later becomes publicly available without violation of this MOU or may be lawfully obtained by a Party from a non-party; or (v) which is a public record under California law.

b. If disclosure of Confidential Information is requested pursuant to law, statute, rule or regulation (including a subpoena, a request made to a School under the California Public Records Act, or other similar form of process), the Party to which the request for disclosure is made shall (other than in connection with routine supervisory examinations by regulatory authorities with jurisdiction and without breaching any legal or regulatory requirement) provide the applicable Party(ies) with prior prompt written notice thereof to the extent practicable, and if practicable under the circumstances, shall allow the applicable Party(ies) to seek a restraining order or other appropriate relief.

c. Upon the termination or expiration of this MOU, Confidential Information of each Party in the possession of the other Party shall be returned and/or destroyed.

12. Student Information. Each Party is responsible for its compliance with the federal Family Educational Rights and Privacy Act (20 U.S.C. § 1232g) ("**FERPA**") and other applicable state and federal laws pertaining to student information and privacy.

a. To the extent necessary, the Lessor School shall be designated as having a legitimate educational interest in accessing a Lessee School's student education records, as that term is defined by and for purposes of FERPA, thereby allowing Lessor School to access personally identifiable information from student education records from the Lessee School as part of its performance of the Services. For purposes of this MOU, the term "personally identifiable information" ("**PII**") means any information that can be used on its own or with other information to (i) distinguish one person from another, (ii) identify, contact, or locate a single person, or (iii) de-anonymize anonymous data.

b. Lessor School shall not use or disclose pupil records, including PII, received from or on behalf of another School except as necessary with respect to the performance of the Services, as

required by law, or as otherwise authorized in writing by the applicable Lessee School. Lessor School shall protect the student education records it receives from or on behalf of another School no less rigorously than it protects its own student education records. In the event of an unauthorized disclosure of PII, Lessor School shall notify the affected Lessee School(s) as soon as practicable, and shall, upon the affected Lessee School(s)'s request, notify affected parents, legal guardians and eligible pupils using reasonably available technological means such as electronic mail.

13. Insurance. Each Party shall maintain customary and reasonable insurance coverage necessary for performance of the Services, including professional liability for errors or omissions and/or directors and officers coverages, comprehensive general liability coverage, and automobile liability coverage. Each Party shall be responsible for obtaining and maintaining workers' compensation coverage and unemployment insurance for its employees.

14. Liability. Each Party shall be and remain responsible for its own debts and obligations. Nothing in this MOU shall be construed as imposing on a Party any liability arising out of the operations of any other Party, except as such liability may result from the performance of the first Party's obligations under this MOU.

15. Indemnification. Each Party shall defend, indemnify, and hold the other Parties, and their employees, officers, directors, and agents, free and harmless against any liability, loss, claims, demands, damages, expenses, and costs (including attorneys' fees, expert witness fees, and other costs of litigation or other proceedings) of every kind or nature arising in any manner out of the performance of its obligations under this MOU, except for such loss or damage caused solely by the negligence or willful misconduct of another Party. Each Leased Employee shall be under the immediate supervision and control of the Lessee School when providing Services for that Lessee School. Therefore, the Lessee School shall defend, indemnify, and hold the other Parties, and their employees, officers, directors, and agents, free and harmless against any liability, loss, claims, demands, damages, expenses, and costs (including attorneys' fees, expert witness fees, and other costs of litigation or other proceedings) of every kind or nature arising in any manner out of the performance of a Leased Employee providing Services to a Lessee School, except for such loss or damage caused solely by the negligence or willful misconduct of another Party.

16. Assignment. No Party shall assign this MOU, any interest in this MOU, or its rights or obligations under this MOU without the express prior written consent of the other Parties. This MOU shall be binding on, and shall inure to the benefit of, the Parties and their respective successors and assigns.

17. Dispute Resolution. The Parties shall attempt to negotiate in good faith to resolve any dispute arising from or relating to this MOU before resorting to litigation.

18. Notice. All notices, requests, demands, or other communications (collectively "**Notice**") given to or by the Parties under this MOU shall be in writing and shall be deemed to have been duly given on the date of receipt if transmitted by email or personally served on the Party(ies) to whom Notice is to be given, or seventy-two (72) hours after mailing by United States mail first class, registered or certified mail, postage prepaid, addressed to the Party(ies) to whom Notice is to be given, at the applicable address set forth below:

See Attachment C

19. Headings. The descriptive headings of the sections and/or paragraphs of this MOU are inserted for convenience only, are not part of this MOU, and do not in any way limit or amplify the terms or provisions of this MOU.

20. Entire Agreement. This MOU constitutes the entire agreement between the Parties with respect to the subject matter contained herein and supersedes all agreements, representations and understandings of the Parties with respect to such subject matter made or entered into prior to the date of this MOU.

21. No Waiver. No waiver of any provision of this MOU shall constitute, or be deemed to constitute, a waiver of any other provision, nor shall any waiver constitute a continuing waiver. No waiver shall be binding unless executed in writing by the Party making the waiver.

22. Severability. If any provision of this MOU is invalid or contravenes California law, such provision shall be deemed not to be a part of this MOU and shall not affect the validity or enforceability of its remaining provisions, unless such invalidity or unenforceability would defeat an essential purpose of this MOU.

23. Governing Law. This MOU shall be governed by and interpreted under California law.

24. Authority to Contract. Each Party warrants to the others that it has the authority to enter into this MOU, that it is a binding and enforceable obligation of said Party, and that the undersigned has been duly authorized to execute this MOU.

25. Counterparts. This MOU may be executed in counterparts, each of which shall be deemed an original and all of which together shall constitute one instrument. A faxed, .pdf, or other electronic copy of the fully executed original version of this MOU shall have the same legal effect as an executed original for all purposes.

IN WITNESS WHEREOF, the Parties execute this MOU as of the Effective Date above.

Blue Ridge Academy, a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: March ____, 2019

Lake View Charter School, a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: March ____, 2019

Winship Community School, a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: March ____, 2019

Pacific Coast Academy, a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: March ____, 2019

[INSERT]
benefit cor

By: _____
Name: _____
Its: _____
Date: Mar

Monarch River Academy, a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: March ____, 2019

Mission Vista Academy, a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: February ____, 2019

Heartland Charter School, a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: February ____, 2019

Clarksville Charter School, a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: March ____, 2019

Cabrillo Point Academy (South), a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: March ____, 2019

Granite Mountain Charter School, a California nonprofit public benefit corporation

By: _____
Name: _____
By: _____
Date: March ____, 2019
Its: _____
Date: March ____, 2019

Triumph Academy, a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: March ____, 2019

Yosemite Valley Charter School (Central) a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: March ____, 2019

Feather River Charter School (North), a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: March ____, 2019

The Cottonwood School, a California nonprofit public benefit corporation

By: _____
Name: _____
Its: _____
Date: March ____, 2019

[INSERT]
benefit corporation

By: _____
Name: _____
Its: _____
Date: March ____, 2019

ATTACHMENT A
DESCRIPTION OF LEASED EMPLOYEE SERVICES

Position	Teacher
Description of Services	<p>Teachers plan and provide appropriate learning experiences for students at the Lessee School. Duties and responsibilities include, but are not limited, to:</p> <ul style="list-style-type: none"> • Maintaining appropriate teaching credentials. • Providing direct and indirect instruction to Lessee School students. • Ensure that prior to commencing instruction to Lessee School students, such students have an independent study agreement that is complete as to all of its terms, signed by necessary parties and dated. • Long and short-term planning addressing individual needs of students. • Evaluating students' progress. • Support in accessing and obtaining necessary educational items and services. • Teaching an individualized approach per the Charter Petition. • Providing an inviting, exciting, and innovative learning environment to Students. • Preparing written reports (e.g., work product review) accurately and submitting reports in a timely manner. • Serving as advisors to students.

	Salary	Payroll Taxes	STRS	403B	Worker's Comp	Medical	Total	Student Count	Cost per Student	Monthly Student Cost
Teachers	\$ 60,000	\$ 7,050	\$ 6,197	\$ 1,200	\$ 900	\$ 6,000	\$ 81,347	28	\$ 2,905.24	\$ 290.52

ATTACHMENT B **LIST OF LEASED EMPLOYEE SERVICES**

	Salary	Payroll Taxes	STRS	403B	Worker's Comp	Medical	Total	Hourly Rate Charged
504 Coordinators	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
Student Support Coordinator SST	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
Intervention Coordinator/Math	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
Intervention Coordinator/Reading	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
Online Intervention Coordinator	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
Speech Team	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
Program Specialists	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
Support School Nurse	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
Program Specialist	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
Mental Health Psychologist	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
MH/Assessment Team School Psych	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
School Psychologist	\$ 85,000	\$ 9,988	\$ 8,779	\$ 1,700	\$ 1,275	\$ 8,500	\$ 115,241	\$ 93.69
Speech-Language Pathologist	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
Occupational Therapist	\$ 78,000	\$ 9,165	\$ 8,056	\$ 1,560	\$ 1,170	\$ 7,800	\$ 105,751	\$ 85.98
School Nurse	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
Senior Director of Special Education	\$ 195,000	\$ 22,913	\$ 20,140	\$ 3,900	\$ 2,925	\$ 19,500	\$ 264,377	\$ 127.10
Regional Director of Special Education	\$ 135,000	\$ 15,863	\$ 13,943	\$ 2,700	\$ 2,025	\$ 13,500	\$ 183,030	\$ 88.00
Director of Special Education Assessment, Account	\$ 140,000	\$ 16,450	\$ 14,459	\$ 2,800	\$ 2,100	\$ 14,000	\$ 189,809	\$ 91.25
Assistant Director of Special Education	\$ 110,000	\$ 12,925	\$ 11,361	\$ 2,200	\$ 1,650	\$ 11,000	\$ 149,136	\$ 71.70
Education Specialist/Case Manager	\$ 64,800	\$ 7,614	\$ 6,693	\$ 1,296	\$ 972	\$ 6,480	\$ 87,855	\$ 71.43
Speech Pathologist	\$ 82,000	\$ 9,635	\$ 8,469	\$ 1,640	\$ 1,230	\$ 8,200	\$ 111,174	\$ 90.39
Paraprofessional	\$ 42,400	\$ 4,982	\$ 4,379	\$ 848	\$ 636	\$ 4,240	\$ 57,485	\$ 33.16
Assistive Technology Coordinator	\$ 47,000	\$ 5,523	\$ 4,854	\$ 940	\$ 705	\$ 4,700	\$ 63,722	\$ 36.76
Regional Student Records Coordinator	\$ 35,000	\$ 4,113	\$ 3,615	\$ 700	\$ 525	\$ 3,500	\$ 47,452	\$ 22.81
Lead SpEd Student Records Coordinator	\$ 56,000	\$ 6,580	\$ 5,784	\$ 1,120	\$ 840	\$ 5,600	\$ 75,924	\$ 36.50
Lead Services Coordinator	\$ 47,000	\$ 5,523	\$ 4,854	\$ 940	\$ 705	\$ 4,700	\$ 63,722	\$ 30.64
Regional SEIS Coordinator	\$ 50,000	\$ 5,875	\$ 5,164	\$ 1,000	\$ 750	\$ 5,000	\$ 67,789	\$ 32.59
Regional Services Coordinator	\$ 36,500	\$ 4,289	\$ 3,770	\$ 730	\$ 548	\$ 3,650	\$ 49,486	\$ 23.79
Administrative Support Specialist	\$ 36,500	\$ 4,289	\$ 3,770	\$ 730	\$ 548	\$ 3,650	\$ 49,486	\$ 23.79
Lead Assessment Coordinator	\$ 63,250	\$ 7,432	\$ 6,532	\$ 1,265	\$ 949	\$ 6,325	\$ 85,753	\$ 41.23
Assessment Team Coordinator	\$ 59,750	\$ 7,021	\$ 6,171	\$ 1,195	\$ 896	\$ 5,975	\$ 81,008	\$ 38.95
Regional Assessment Team Coordinator	\$ 40,600	\$ 4,771	\$ 4,193	\$ 812	\$ 609	\$ 4,060	\$ 55,045	\$ 26.46
Transition Job Coach	\$ 38,500	\$ 4,524	\$ 3,976	\$ 770	\$ 578	\$ 3,850	\$ 52,198	\$ 30.11
HQT's	\$ 60,000	\$ 7,050	\$ 6,197	\$ 1,200	\$ 900	\$ 6,000	\$ 81,347	\$ 46.93
EL Support Coordinators	\$ 67,975	\$ 7,987	\$ 7,020	\$ 1,360	\$ 1,020	\$ 6,798	\$ 92,159	\$ 74.93
High School Content Specialists	\$ 75,000	\$ 8,813	\$ 7,746	\$ 1,500	\$ 1,125	\$ 7,500	\$ 101,684	\$ 82.67
Director of Student Achievement	\$ 205,000	\$ 24,088	\$ 21,172	\$ 4,100	\$ 3,075	\$ 20,500	\$ 277,935	\$ 133.62
Director of Secondary Services	\$ 175,000	\$ 20,563	\$ 18,074	\$ 3,500	\$ 2,625	\$ 17,500	\$ 237,262	\$ 114.07
Director of Curriculum	\$ 165,000	\$ 19,388	\$ 17,041	\$ 3,300	\$ 2,475	\$ 16,500	\$ 223,704	\$ 107.55
Senior Director of Student Support	\$ 145,000	\$ 17,038	\$ 14,976	\$ 2,900	\$ 2,175	\$ 14,500	\$ 196,588	\$ 94.51
Director of Intervention	\$ 110,000	\$ 12,925	\$ 11,361	\$ 2,200	\$ 1,650	\$ 11,000	\$ 149,136	\$ 71.70
Assistant Director of SPED Transition	\$ 110,000	\$ 12,925	\$ 11,361	\$ 2,200	\$ 1,650	\$ 11,000	\$ 149,136	\$ 71.70
High School Counselors	\$ 64,362	\$ 7,562	\$ 6,647	\$ 1,287	\$ 965	\$ 6,436	\$ 87,260	\$ 70.94
Assessment Intake Specialist	\$ 40,300	\$ 4,735	\$ 4,162	\$ 806	\$ 605	\$ 4,030	\$ 54,638	\$ 26.27

ATTACHMENT C
ADDRESSES OF NOTICE

Party #1	Blue Ridge Academy (Kern) 955 Stanislaus St., Maricopa, CA 93252-9779
Party #2	Granite Mountain Charter School 8560 Aliento Rd., Lucerne Valley, CA 92356-8133
Party #3	Triumph Academy 8560 Aliento Rd., Lucerne Valley, CA 92356-8133
Party #4	Heartland Charter School 955 Stanislaus St., Maricopa, CA 93252-9779
Party #5	Clarksville Charter School 5049 Robert J. Mathews Pkwy, El Dorado Hills, CA 95762-5752
Party #6	Feather River Charter School (North) 17451 Pepper St, Robbins, CA 95676
Party #7	Cabrillo Point Academy (South) 4612 Dehesa Rd., El Cajon, CA 92019-2922
Party #8	The Cottonwood School 7006 Rossmore Lane, El Dorado Hills, CA 95762
Party #9	Lake View Charter School 4672 County Road North, Orland, CA 95963-8103
Party #10	Winship Community School 4305 South Meridian Rd., Meridian, CA 95957-9647
Party #11	Pacific Coast Academy 4612 Dehesa Rd., El Cajon, CA 92019-2922
Party #12	Yosemite Valley Charter School (Central) 1781 East Fir Ave., Ste. #101, Fresno, CA 93720-3840
Party #13	Monarch River Academy 2293 East Crabtree Ave., Porterville, CA 93257-5225
Party #14	Mission Vista Academy 1440 Beaumont Avenue, Suite A2 #412, Beaumont, CA 92223

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Monarch Charter School

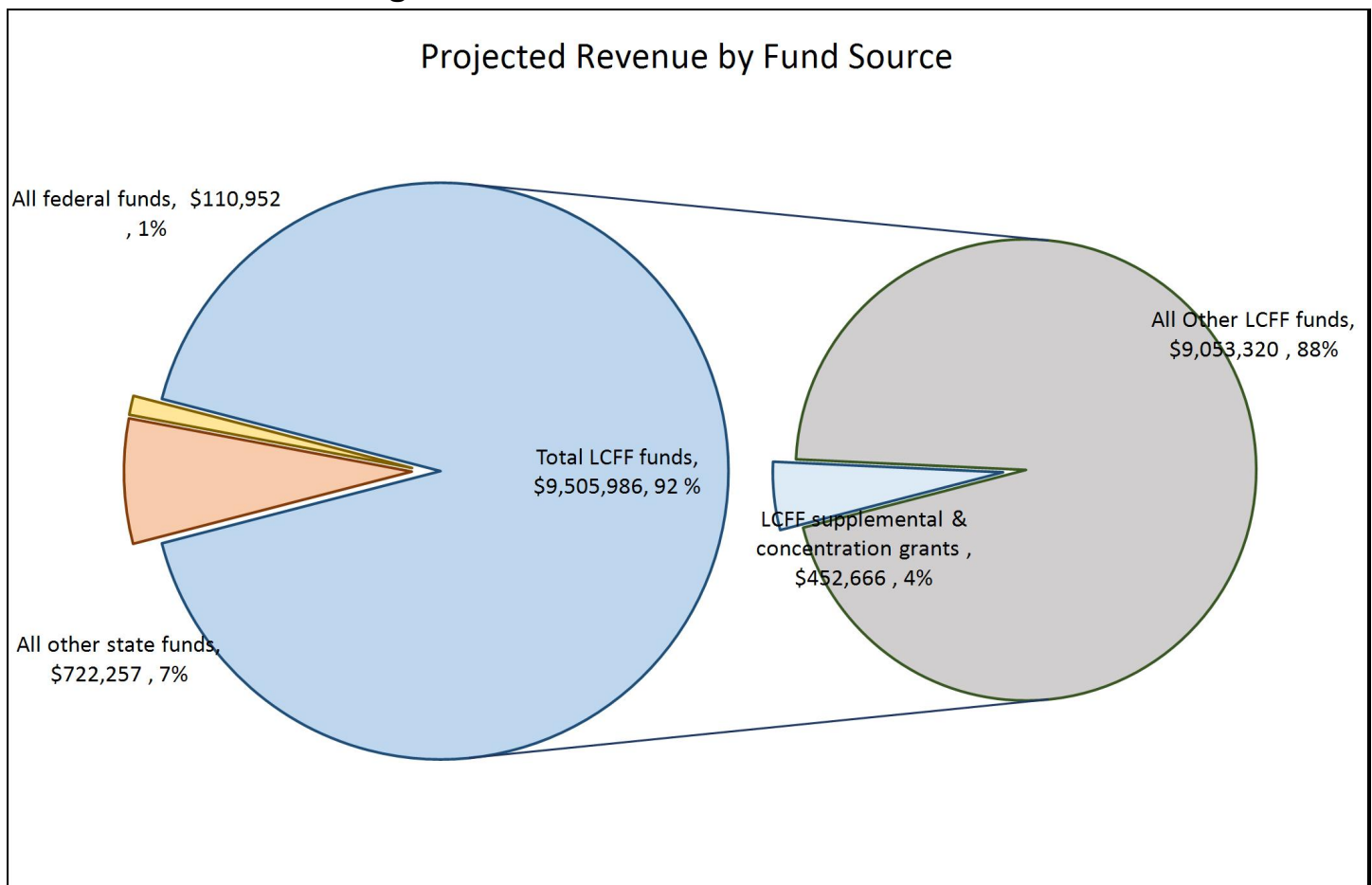
CDS Code:

Local Control and Accountability Plan (LCAP) Year: 2019-20

LEA contact information: Amy Davis, Senior Director

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2019-20 LCAP Year

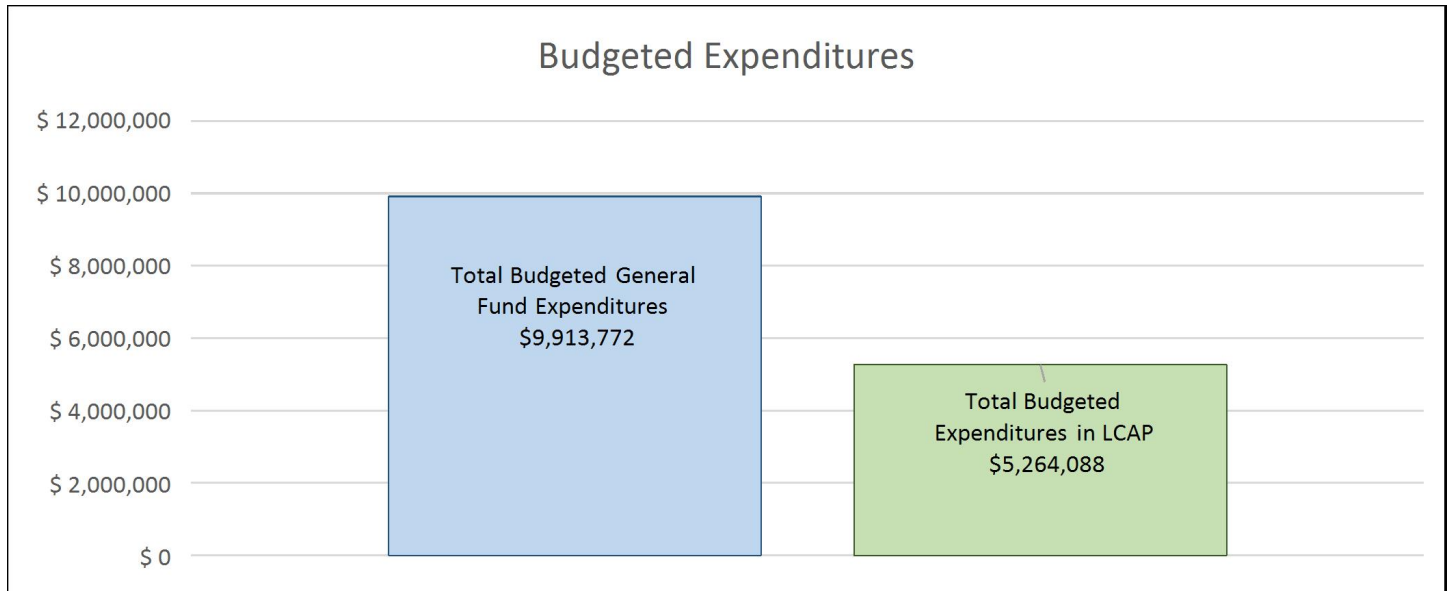


This chart shows the total general purpose revenue Monarch Charter School expects to receive in the coming year from all sources.

The total revenue projected for Monarch Charter School is \$10,339,196, of which \$9,505,986 is Local Control Funding Formula (LCFF), \$722,257 is other state funds, \$0 is local funds, and \$110,952 is federal funds. Of the \$9,505,986 in LCFF Funds, \$452,666 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Monarch Charter School plans to spend for 2019-20. It shows how much of the total is tied to planned actions and services in the LCAP.

Monarch Charter School plans to spend \$9,913,772 for the 2019-20 school year. Of that amount, \$5,264,088 is tied to actions/services in the LCAP and \$4,649,684 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

Classified salaries/benefits, administrator salaries/benefits, instructional materials, operations, professional services, and facility-related costs. The cost of our instructional materials is significant because we offer a variety of educational platforms including online courses, blended models of online course work, educational enrichment opportunities, and individual tutoring services.

Increased or Improved Services for High Needs Students in 2019-20

In 2019-20, Monarch Charter School is projecting it will receive \$452,666 based on the enrollment of foster youth, English learner, and low-income students. Monarch Charter School must demonstrate the planned actions and services will increase or improve services for high needs students compared to the services all students receive in proportion to the increased funding it receives for high needs students. In the LCAP, Monarch Charter School plans to spend \$452,666 on actions to meet this requirement.

Local Control Accountability Plan and Annual Update (LCAP) Template

[Addendum](#): General instructions & regulatory requirements.

[Appendix A](#): Priorities 5 and 6 Rate Calculations

[Appendix B](#): Guiding Questions: Use as prompts (not limits)

LEA Name

Monarch Charter School

Contact Name and Title

Amy Davis
Senior Director

Email and Phone

amy@inspireschools.org
951-456-1981

2017-20 Plan Summary

The Story

Describe the students and community and how the LEA serves them.

Monarch Charter School is a tuition-free public charter school offering personalized student learning in grades TK through 12 . We offer multiple educational programs and encourages parents to customize their child's learning experience to help address individual learning needs. Under the direction of caring, appropriately credentialed teachers, students complete an independent study and small group instruction online programs. Students can choose to complete their educational experience completely online, participate in a blended model of online coursework with some direct instruction, complete some offline textbook work, participate in homeschool curriculum, enroll in project-based courses, and enjoy enrichment opportunities.

LCAP Highlights

Identify and briefly summarize the key features of this year's LCAP.

Although this is our first year of operation, we will focus on our four-year graduation rate and performance on state assessments through the following actions:

- Implement four-year graduation rate needs assessment and root cause analysis including related professional development (Goal 4, Action1)
- Implement Project Recovery for students, particularly for unduplicated students including those who are English Learners, Foster Youth, or have a low socio-economic background. (Goal 4, Action 4); and
- Targeted Professional Development for teachers to support students who are performing below grade level standard on the Smarter Balance Assessment or district diagnostic assessments (Goal 2, Action 4)

Review of Performance

Based on a review of performance on the state indicators and local performance indicators included in the California School Dashboard, progress toward LCAP goals, local self-assessment tools, stakeholder input, or other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying any specific examples of how past increases or improvements in services for low-income students, English learners, and foster youth have led to improved performance for these students.

Greatest Progress

Because Monarch is in its initial year, we do not have California School Dashboard results to measure our performance. We look forward to analyzing our Dashboard results next year.

Referring to the California School Dashboard, identify any state indicator or local performance indicator for which overall performance was in the “Red” or “Orange” performance category or where the LEA received a “Not Met” or “Not Met for Two or More Years” rating. Additionally, identify any areas that the LEA has determined need significant improvement based on review of local performance indicators or other local indicators. What steps is the LEA planning to take to address these areas with the greatest need for improvement?

Greatest Needs

We are expecting to receive our initial California School Dashboard results in December 2020 and will assess our greatest needs at that point.

Referring to the California School Dashboard, identify any state indicator for which performance for any student group was two or more performance levels below the “all student” performance. What steps is the LEA planning to take to address these performance gaps?

Performance Gaps

This is our first year and thus do not expect to receive any California Dashboard results until 2020. When released, we will review Dashboard results to discern whether we are experiencing any performance gaps among student groups.

Comprehensive Support and Improvement

An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts.

Schools Identified

Identify the schools within the LEA that have been identified for CSI.

N/A

Support for Identified Schools

Describe how the LEA supported the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

N/A

Monitoring and Evaluating Effectiveness

Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

N/A

Goals, Actions, & Services

Strategic Planning Details and Accountability

Complete a copy of the following table for each of the LEA's goals. Duplicate the table as needed.

(Select from New Goal, Modified Goal, or Unchanged Goal)

New Goal

Goal 1

Provide high-quality teaching and learning that promotes opportunity for applying knowledge within an independent study/online curriculum structure.

State and/or Local Priorities addressed by this goal:

State Priorities: Priority 1: Basic (Conditions of Learning)
Priority 7: Course Access (Conditions of Learning)
Local Priorities: Basic Conditions

Identified Need:

As an independent study school, students need a variety of ways to engage with the school community to positively impact their educational experience. Focused professional development for parents/learning coaches continues to be a need because they provide daily instructional support to students.

Expected Annual Measurable Outcomes

Metrics/Indicators	Baseline	2017-18	2018-19	2019-20
Percent of teachers appropriately credentialed and assigned.	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Percent of facilities considered safe as demonstrated in the Facilities Inventory (FIT) Report.	Baseline will be based on 19- 20 results	N/A	N/A	TBD

Metrics/Indicators	Baseline	2017-18	2018-19	2019-20
Percent of student with access to CA state standards-aligned instructional materials (text and e-text) for all core subject areas.	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Percent of students who have access to a computer.	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Percent of students who have a broad course of study through vendor lobby electives and enrichment opportunities.	Baseline will be based on 19- 20 results	N/A	N/A	TBD

Planned Actions / Services

Complete a copy of the following table for each of the LEA's Actions/Services. Duplicate the table, including Budgeted Expenditures, as needed.

Action 1

All	All Schools Specific Grade Spans: K-12
-----	---

OR

[Add Students to be Served selection here]	[Add Scope of Services selection here]	[Add Location(s) selection here]
--	--	----------------------------------

Actions/Services

		New Action
		Ensure teachers are appropriate credentialed and assigned.

Budgeted Expenditures

Amount			\$2,746,500
Source			LCFF Base
Budget Reference			1000-1999: Certificated Personnel Salaries Certificated Teachers

Action 2

For Actions/Services not included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from All, Students with Disabilities, or Specific Student Groups)

All

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

All Schools

OR

For Actions/Services included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from English Learners, Foster Youth, and/or Low Income)

[Add Students to be Served selection here]

Scope of Services:

(Select from LEA-wide, Schoolwide, or Limited to Unduplicated Student Group(s))

[Add Scope of Services selection here]

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

[Add Location(s) selection here]

Actions/Services

Select from New, Modified, or Unchanged for 2017-18

Select from New, Modified, or Unchanged for 2018-19

Select from New, Modified, or Unchanged for 2019-20

New Action

2017-18 Actions/Services

2018-19 Actions/Services

2019-20 Actions/Services

Staff will meet in monthly PLNs to share and discuss best practices and resources for supporting learning in a virtual environment.

Budgeted Expenditures

Year	2017-18	2018-19	2019-20
Amount			\$22,681
Source			LCFF Base
Budget Reference			5800: Professional/Consulting Services And Operating Expenditures Professional Development

Action 3

All	All Schools
-----	-------------

OR

[Add Students to be Served selection here]	[Add Scope of Services selection here]	[Add Location(s) selection here]
--	--	----------------------------------

Actions/Services

		New Action
		Provide access to broad course of study such as VAPA courses and enrichment opportunities

Budgeted Expenditures

Amount			\$1,432,956
Source			LCFF Base
Budget Reference			5000-5999: Services And Other Operating Expenditures Reference new account 5106 Other Educational Consultants

Action 4

For Actions/Services not included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from All, Students with Disabilities, or Specific Student Groups)

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

OR

For Actions/Services included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from English Learners, Foster Youth, and/or Low Income)

Scope of Services:

(Select from LEA-wide, Schoolwide, or Limited to Unduplicated Student Group(s))

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

Actions/Services

Select from New, Modified, or Unchanged for 2017-18

2017-18 Actions/Services

Select from New, Modified, or Unchanged for 2018-19

2018-19 Actions/Services

Select from New, Modified, or Unchanged for 2019-20

2019-20 Actions/Services

Budgeted Expenditures

Year	2017-18	2018-19	2019-20
------	---------	---------	---------

Goals, Actions, & Services

Strategic Planning Details and Accountability

Complete a copy of the following table for each of the LEA's goals. Duplicate the table as needed.

(Select from New Goal, Modified Goal, or Unchanged Goal)

New Goal

Goal 2

Provide appropriate tiered supports that promote and sustain positive social/emotional development as well increased academic achievement for all students.

State and/or Local Priorities addressed by this goal:

State Priorities: Priority 2: State Standards (Conditions of Learning)
 Priority 4: Pupil Achievement (Pupil Outcomes)
 Priority 7: Course Access (Conditions of Learning)

Local Priorities: Implementation of Academic Standards

Identified Need:

In our initial year, this goal is focused on our performance on the California School Dashboard.

Expected Annual Measurable Outcomes

Metrics/Indicators	Baseline	2017-18	2018-19	2019-20
CAASPP participation rate will be at least 95%	Baseline will be based on 19- 20 results	N/A	N/A	TBD
The percentage of Inspire students meeting or exceeding standards on CAASPP ELA assessments, including all subgroups	Baseline will be based on 19- 20 results	N/A	N/A	TBD
The percentage of Inspire students meeting	Baseline will be based on 19- 20 results	N/A	N/A	TBD

Metrics/Indicators	Baseline	2017-18	2018-19	2019-20
or exceeding standards on CAASPP Mathematics assessments, including all subgroups				
10% of English Learners will increase one level of proficiency on the English Learner Progress Indicator annually	Baseline will be based on 19- 20 results	N/A	N/A	TBD
At least 10% of EL students will reclassify	Baseline will be based on 19- 20 results	N/A	N/A	TBD
100% of teachers will engage in >15 hours of curriculum training and CCSS PD during the school year	Baseline will be based on 19- 20 results	N/A	N/A	TBD
95% of all students will participate in quarterly interim benchmark assessments to show mastery of standards taught	Baseline will be based on 19- 20 results	N/A	N/A	TBD

Planned Actions / Services

Complete a copy of the following table for each of the LEA's Actions/Services. Duplicate the table, including Budgeted Expenditures, as needed.

Action 1

All	All Schools
-----	-------------

OR

[Add Students to be Served selection here]	[Add Scope of Services selection here]	[Add Location(s) selection here]
--	--	----------------------------------

Actions/Services

		New Action
		Administer interim benchmark assessments to identify the standards not yet mastered and prepare for state testing in ELA and Math.

Budgeted Expenditures

Amount			\$31,444
Source			LCFF Base
Budget Reference			4000-4999: Books And Supplies

Action 2

For Actions/Services not included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from All, Students with Disabilities, or Specific Student Groups)

All
Students with Disabilities

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

All Schools

OR

For Actions/Services included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from English Learners, Foster Youth, and/or Low Income)

[Add Students to be Served selection here]
--

Scope of Services:

(Select from LEA-wide, Schoolwide, or Limited to Unduplicated Student Group(s))

[Add Scope of Services selection here]
--

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

[Add Location(s) selection here]

Actions/Services

Select from New, Modified, or Unchanged for 2017-18

--

Select from New, Modified, or Unchanged for 2018-19

--

Select from New, Modified, or Unchanged for 2019-20

New Action

2017-18 Actions/Services

2018-19 Actions/Services

2019-20 Actions/Services

Continue Multi-Tiered Systems of Supports to identify student attendance and academic/social needs, or exceptional needs and to individualize support including online virtual instruction license assignments, and enrichment tutoring services

Budgeted Expenditures

Year	2017-18	2018-19	2019-20
Amount			\$291,250
Source			LCFF Base
Budget Reference			4000-4999: Books And Supplies See software costs listed in goal 1 action 4

Action 3

For Actions/Services not included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from All, Students with Disabilities, or Specific Student Groups)

[Add Students to be Served selection here]

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

[Add Location(s) selection here]

OR

For Actions/Services included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from English Learners, Foster Youth, and/or Low Income)

English Learners

Scope of Services:

(Select from LEA-wide, Schoolwide, or Limited to Unduplicated Student Group(s))

Limited to Unduplicated Student Group(s)

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

All Schools

Actions/Services

Select from New, Modified, or Unchanged for 2017-18

Select from New, Modified, or Unchanged for 2018-19

Select from New, Modified, or Unchanged for 2019-20

		New Action
--	--	------------

2017-18 Actions/Services

--

2018-19 Actions/Services

--

2019-20 Actions/Services

Provide professional development to help guide and support administrators, counselors, and teachers in addressing the academic needs of ELs and their families including administering ELPAC, identifying ELs, administering language surveys, and coordinating ELD instruction.
--

Budgeted Expenditures

Year	2017-18	2018-19	2019-20
Amount			\$100,000
Source			LCFF SC
Budget Reference			1000-1999: Certificated Personnel Salaries

Action 4

For Actions/Services not included as contributing to meeting the Increased or Improved Services Requirement:
--

Students to be Served:

(Select from All, Students with Disabilities, or Specific Student Groups)

All

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

All Schools

OR

For Actions/Services included as contributing to meeting the Increased or Improved Services Requirement:
--

Students to be Served:

(Select from English Learners, Foster Youth, and/or Low Income)

[Add Students to be Served selection here]
--

Scope of Services:

(Select from LEA-wide, Schoolwide, or Limited to Unduplicated Student Group(s))

[Add Scope of Services selection here]
--

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

[Add Location(s) selection here]

Actions/Services

Select from New, Modified, or Unchanged
for 2017-18

Select from New, Modified, or Unchanged
for 2018-19

Select from New, Modified, or Unchanged
for 2019-20

2017-18 Actions/Services

2018-19 Actions/Services

2019-20 Actions/Services

Budgeted Expenditures

Year	2017-18	2018-19	2019-20
Amount	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>
Source	<input type="text"/>	<input type="text"/>	<input type="text" value="LCFF Base"/>
Budget Reference	<input type="text"/>	<input type="text"/>	<input type="text" value="5000-5999: Services And Other Operating Expenditures Included in 5104 PD costs listed in Goal 1, Action 2"/>

Action 5

For Actions/Services not included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from All, Students with Disabilities, or Specific Student Groups)

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

OR

For Actions/Services included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from English Learners, Foster Youth, and/or Low Income)

Scope of Services:

(Select from LEA-wide, Schoolwide, or Limited to Unduplicated Student Group(s))

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

Actions/Services

Select from New, Modified, or Unchanged
for 2017-18

Select from New, Modified, or Unchanged
for 2018-19

Select from New, Modified, or Unchanged
for 2019-20

2017-18 Actions/Services

2018-19 Actions/Services

2019-20 Actions/Services

Budgeted Expenditures

Year	2017-18	2018-19	2019-20
------	---------	---------	---------

Goals, Actions, & Services

Strategic Planning Details and Accountability

Complete a copy of the following table for each of the LEA's goals. Duplicate the table as needed.

(Select from New Goal, Modified Goal, or Unchanged Goal)

New Goal

Goal 3

Create systems and structures that provide multiple personalized learning paths to increase cohort graduation rate and College and Career Readiness of students to close the achievement gap

State and/or Local Priorities addressed by this goal:

State Priorities: Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

Local Priorities:

Identified Need:

In our initial year, the purpose of this goal to increase our students' college and career readiness including the implementation of vertically aligned CTE pathways, college-level courses, and completion of A-G course sequences.

Expected Annual Measurable Outcomes

Metrics/Indicators	Baseline	2017-18	2018-19	2019-20
The number of students taking college level courses (concurrent enrollment or within community colleges)	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Counselors and HST teachers will meet with each student and family to a create personalized learning plan	Baseline will be based on 19- 20 results	N/A	N/A	TBD

Metrics/Indicators	Baseline	2017-18	2018-19	2019-20
Increase the number of Career Technical Pathways	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Increase the percentage of students scoring at Prepared and Approaching Prepared on the College Career Indicator	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Percent of students that pass AP examination with a score of 3 or higher	Baseline will be based on 19- 20 results	N/A	N/A	TBD

Planned Actions / Services

Complete a copy of the following table for each of the LEA's Actions/Services. Duplicate the table, including Budgeted Expenditures, as needed.

Action 1

All	All Schools
-----	-------------

OR

[Add Students to be Served selection here]	[Add Scope of Services selection here]	[Add Location(s) selection here]
--	--	----------------------------------

Actions/Services

		New Action
		Increase number of vertically aligned CTE Pathways

Budgeted Expenditures

Amount			0
Source			LCFF Base
Budget Reference			1000-1999: Certificated Personnel Salaries No additional expenses

Action 2

All	All Schools
-----	-------------

OR

[Add Students to be Served selection here]	[Add Scope of Services selection here]	[Add Location(s) selection here]
--	--	----------------------------------

Actions/Services

		New Action Unchanged Action
		Continue to support and provide professional development to administrators and teachers to ensure students demonstrate preparedness as measured by the College Career Indicator.

Budgeted Expenditures

Amount			0
Source			LCFF Base
Budget Reference			5800: Professional/Consulting Services And Operating Expenditures Professional/consulting and operating expenditures/costs included in Goal 1, Action 2

Action 3

All	All Schools
-----	-------------

OR

[Add Students to be Served selection here]	[Add Scope of Services selection here]	[Add Location(s) selection here]
--	--	----------------------------------

Actions/Services

		New Action
		The school will establish an IGPS review/adjustment procedure that includes reviewing individual student grades after every grading period. Counselors and HSTs will identify, create a plan and monitor for students at risk.

Budgeted Expenditures

Amount			0
Source			LCFF Base
Budget Reference			1000-1999: Certificated Personnel Salaries Costs included in Goal 1, Action 1

Action 4

For Actions/Services not included as contributing to meeting the Increased or Improved Services Requirement:
--

Students to be Served:

(Select from All, Students with Disabilities, or Specific Student Groups)

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

OR

For Actions/Services included as contributing to meeting the Increased or Improved Services Requirement:
--

Students to be Served:

(Select from English Learners, Foster Youth, and/or Low Income)

Scope of Services:

(Select from LEA-wide, Schoolwide, or Limited to Unduplicated Student Group(s))

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

Actions/Services

Select from New, Modified, or Unchanged for 2017-18	Select from New, Modified, or Unchanged for 2018-19	Select from New, Modified, or Unchanged for 2019-20
2017-18 Actions/Services	2018-19 Actions/Services	2019-20 Actions/Services

Budgeted Expenditures

Year	<u>2017-18</u>	<u>2018-19</u>	<u>2019-20</u>
------	----------------	----------------	----------------

Goals, Actions, & Services

Strategic Planning Details and Accountability

Complete a copy of the following table for each of the LEA's goals. Duplicate the table as needed.

(Select from New Goal, Modified Goal, or Unchanged Goal)

New Goal

Goal 4

Increase student, parent, staff, and community engagement through collaboration, transparency, and communication and provide broad course of study.

State and/or Local Priorities addressed by this goal:

State Priorities: Priority 3: Parental Involvement (Engagement)
 Priority 5: Pupil Engagement (Engagement)
 Priority 6: School Climate (Engagement)

Local Priorities: • Parent Involvement and Engagement • School Climate Survey

Identified Need:

The focus of this Goal in our initial year is on our four-year cohort high school graduation rate and engagement of stakeholders.

Expected Annual Measurable Outcomes

Metrics/Indicators	Baseline	2017-18	2018-19	2019-20
Increase number of students participating in Enrichment opportunities as measured by student enrollment	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Increased student participation academic and leadership opportunities such as Yearbook Committee,	Baseline will be based on 19- 20 results	N/A	N/A	TBD

Metrics/Indicators	Baseline	2017-18	2018-19	2019-20
Student Council, Meet the Masters based on student sign in				
Increase use of school website and provide parents with updated FAQs, policies, and program descriptions as monitored by Google Analytics	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Maintain chronic absenteeism rate at 0%.	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Maintain the rate of pupil suspension and expulsions rates.	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Increase high school cohort graduation rate	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Decrease the high school cohort dropout rate	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Decrease the middle school dropout rate	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Increase parent participation rate for the school climate survey by 10%	Baseline will be based on 19- 20 results	N/A	N/A	TBD
Maintain current attendance rates of 95% or higher by ensuring the timely completion of assignments	Baseline will be based on 19- 20 results	N/A	N/A	TBD

Planned Actions / Services

Complete a copy of the following table for each of the LEA's Actions/Services. Duplicate the table, including Budgeted Expenditures, as needed.

Action 1

All

All Schools

OR

[Add Students to be Served selection here]

[Add Scope of Services selection here]

[Add Location(s) selection here]

Actions/Services

New Action

Implement four-year graduation rate needs assessment and root cause analysis including related professional development

Budgeted Expenditures

Amount

0

Source

LCFF Base

Budget
Reference

1000-1999: Certificated Personnel
Salaries
No additional costs

Action 2

For Actions/Services not included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from All, Students with Disabilities, or Specific Student Groups)

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

[Add Students to be Served selection here]

[Add Location(s) selection here]

OR

For Actions/Services included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from English Learners, Foster Youth, and/or Low Income)

English Learners
Foster Youth
Low Income

Scope of Services:

(Select from LEA-wide, Schoolwide, or Limited to Unduplicated Student Group(s))

Schoolwide

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

All Schools
Specific Grade Spans: K-12

Actions/Services

Select from New, Modified, or Unchanged for 2017-18

Select from New, Modified, or Unchanged for 2018-19

Select from New, Modified, or Unchanged for 2019-20

New Action

2017-18 Actions/Services**2018-19 Actions/Services****2019-20 Actions/Services**

Fund parent liaison position to address specific needs of unduplicated students including augmented communication with their families

Budgeted Expenditures

Year	2017-18	2018-19	2019-20
Amount			\$100,000
Source			LCFF SC
Budget Reference			1000-1999: Certificated Personnel Salaries

Action 3

[Add Students to be Served selection here]

All Schools
[Add Location(s) selection here]

OR

Foster Youth Low Income [Add Students to be Served selection here]	Schoolwide [Add Scope of Services selection here]	All Schools Specific Grade Spans: K-12 [Add Location(s) selection here]
--	--	---

Actions/Services

		New Action
		Fund Foster/homeless youth liaison position to address the specific needs of foster/homeless youth including proactive monitoring of socio-emotional needs

Budgeted Expenditures

Amount			\$150,000
Source			LCFF SC
Budget Reference			1000-1999: Certificated Personnel Salaries

Action 4

For Actions/Services not included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from All, Students with Disabilities, or Specific Student Groups)

[Add Students to be Served selection here]

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

[Add Location(s) selection here]

OR

For Actions/Services included as contributing to meeting the Increased or Improved Services Requirement:

Students to be Served:

(Select from English Learners, Foster Youth, and/or Low Income)

English Learners
Foster Youth
Low Income

Scope of Services:

(Select from LEA-wide, Schoolwide, or Limited to Unduplicated Student Group(s))

Schoolwide

Location(s):

(Select from All Schools, Specific Schools, and/or Specific Grade Spans)

All Schools
Specific Grade Spans: K-12

Actions/Services

Select from New, Modified, or Unchanged
for 2017-18

Select from New, Modified, or Unchanged
for 2018-19

Select from New, Modified, or Unchanged
for 2019-20

New Action

2017-18 Actions/Services

2018-19 Actions/Services

2019-20 Actions/Services

Implement Project Recovery for students, particularly those with an EL, FY, or SED background, who did not re-enroll with Inspire the following school year as well as those that leave during a school year to decrease the dropout rates in middle and high school.

Budgeted Expenditures

Year	2017-18	2018-19	2019-20
Amount	<input type="text"/>	<input type="text"/>	\$102,666
Source	<input type="text"/>	<input type="text"/>	LCFF SC
Budget Reference	<input type="text"/>	<input type="text"/>	1000-1999: Certificated Personnel Salaries

Action 5

All

All Schools

OR

[Add Students to be Served selection here]

[Add Scope of Services selection here]

[Add Location(s) selection here]

Actions/Services

New Action

Increase opportunities for students to participate in leadership and academic

		events to development confidence and leadership skills.
--	--	---

Budgeted Expenditures

Amount			\$286,591
Source			LCFF Base
Budget Reference			5800: Professional/Consulting Services And Operating Expenditures

Action 6

All	All Schools
-----	-------------

OR

[Add Students to be Served selection here]	[Add Scope of Services selection here]	[Add Location(s) selection here]
--	--	----------------------------------

Actions/Services

		New Action
		Maintain updated FAQs, policies, and program descriptions on school website

Budgeted Expenditures

Amount			0
Source			LCFF Base
Budget Reference			1000-1999: Certificated Personnel Salaries No additional costs

Demonstration of Increased or Improved Services for Unduplicated Pupils

LCAP Year: **2019-20**

Estimated Supplemental and Concentration Grant Funds

\$\$452,666

Percentage to Increase or Improve Services

5%

Describe how services provided for unduplicated pupils are increased or improved by at least the percentage identified above, either qualitatively or quantitatively, as compared to services provided for all students in the LCAP year.

Identify each action/service being funded and provided on a schoolwide or LEA-wide basis. Include the required descriptions supporting each schoolwide or LEA-wide use of funds (see instructions).

We will use supplemental and concentration funds to augment supports and services to principally benefit targeted unduplicated groups including English learners (EL), foster youth (FY), and socioeconomically disadvantaged (SED) students in a school-wide manner.

We have made a concerted effort to analyze the unique academic, social, and emotional needs of students with an EL, FY, or SED background. The supplemental and concentration funds identified in our LCAP effectively support the needs of our unduplicated students by supporting/augmenting the following actions/services:

- Parent liaison position-this position addresses specific needs of unduplicated students including augmented communication with their families (Goal 4,

Action 2)

- Foster/homeless youth liaison position- this position addresses the specific needs of foster/homeless youth including proactive monitoring of socio-

emotional needs (Goal 4, Action 3)

- Provide professional development to help guide and support administrators, counselors, and teachers in addressing the academic needs of ELs and their families including administering ELPAC, identifying ELs, administering language surveys, and coordinating ELD instruction (Goal 2, Action 3)

- Implement Project Recovery for students, particularly those with an EL, FY, or SED background, who did not re-enroll with Inspire the following school year to decrease the dropout rates in middle and high school (Goal 4, Action 4)

LCAP Year: **2018-19**

Estimated Supplemental and Concentration Grant Funds

\$

Percentage to Increase or Improve Services

%

Describe how services provided for unduplicated pupils are increased or improved by at least the percentage identified above, either qualitatively or quantitatively, as compared to services provided for all students in the LCAP year.

Identify each action/service being funded and provided on a schoolwide or LEA-wide basis. Include the required descriptions supporting each schoolwide or LEA-wide use of funds (see instructions).

LCAP Year: **2017-18**

Estimated Supplemental and Concentration Grant Funds

Percentage to Increase or Improve Services

\$

%

Describe how services provided for unduplicated pupils are increased or improved by at least the percentage identified above, either qualitatively or quantitatively, as compared to services provided for all students in the LCAP year.

Identify each action/service being funded and provided on a schoolwide or LEA-wide basis. Include the required descriptions supporting each schoolwide or LEA-wide use of funds (see instructions).

Addendum

The Local Control and Accountability Plan (LCAP) and Annual Update Template documents and communicates local educational agencies' (LEAs) actions and expenditures to support student outcomes and overall performance. The LCAP is a three-year plan, which is reviewed and updated annually, as required. Charter schools may complete the LCAP to align with the term of the charter school's budget, typically one year, which is submitted to the school's authorizer. The LCAP and Annual Update Template must be completed by all LEAs each year.

For school districts, the LCAP must describe, for the school district and each school within the district, goals and specific actions to achieve those goals for all students and each student group identified by the Local Control Funding Formula (LCFF) (ethnic, socioeconomically disadvantaged, English learners, foster youth, pupils with disabilities, and homeless youth), for each of the state priorities and any locally identified priorities.

For county offices of education, the LCAP must describe, for each county office of education-operated school and program, goals and specific actions to achieve those goals for all students and each LCFF student group funded through the county office of education (students attending juvenile court schools, on probation or parole, or expelled under certain conditions) for each of the state priorities and any locally identified priorities. School districts and county offices of education may additionally coordinate and describe in their LCAPs services funded by a school district that are provided to students attending county-operated schools and programs, including special education programs.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in Education Code (EC) sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

Charter schools must describe goals and specific actions to achieve those goals for all students and each LCFF subgroup of students including students with disabilities and homeless youth, for each of the state priorities that apply for the grade levels served or the nature of the program operated by the charter school, and any locally identified priorities. For charter schools, the inclusion and description of goals for state priorities in the LCAP may be modified to meet the grade levels served and the nature of the programs provided, including modifications to reflect only the statutory requirements explicitly applicable to charter schools in the EC. Changes in LCAP goals and actions/services for charter schools that result from the annual update process do not necessarily constitute a material revision to the school's charter petition.

For questions related to specific sections of the template, please see instructions below:

Instructions: Linked Table of Contents

[Plan Summary](#)

[Annual Update](#)

[Stakeholder Engagement](#)

[Goals, Actions, and Services](#)

[Planned Actions/Services](#)

[Demonstration of Increased or Improved Services for Unduplicated Students](#)

For additional questions or technical assistance related to completion of the LCAP template, please contact the local county office of education, or the CDE's Local Agency Systems Support Office at: 916-319-0809 or by email at: lcff@cde.ca.gov.

Plan Summary

The LCAP is intended to reflect an LEA's annual goals, actions, services and expenditures within a fixed three-year planning cycle. LEAs must include a plan summary for the LCAP each year.

When developing the LCAP, enter the appropriate LCAP year, and address the prompts provided in these sections. When developing the LCAP in year 2 or year 3, enter the appropriate LCAP year and replace the previous summary information with information relevant to the current year LCAP.

In this section, briefly address the prompts provided. These prompts are not limits. LEAs may include information regarding local program(s), community demographics, and the overall vision of the LEA. LEAs may also attach documents (e.g., the California School Dashboard data reports) if desired and/or include charts illustrating goals, planned outcomes, actual outcomes, or related planned and actual expenditures.

An LEA may use an alternative format for the plan summary as long as it includes the information specified in each prompt and the budget summary table.

The reference to California School Dashboard means the California School Dashboard adopted by the State Board of Education under EC Section 52064.5.

Comprehensive Support and Improvement

An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified:** Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools:** Describe how the LEA supported the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness:** Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Annual Update

The planned goals, expected outcomes, actions/services, and budgeted expenditures must be copied verbatim from the previous year's* approved LCAP; in addition, list the state and/or local priorities addressed by the planned goals. Minor typographical errors may be corrected.

* For example, for LCAP year 2017/18 of the 2017/18 – 2019/20 LCAP, review the goals in the 2016/17 LCAP. Moving forward, review the goals from the most recent LCAP year. For example, LCAP year 2020/21 will review goals from the 2019/20 LCAP year, which is the last year of the 2017/18 – 2019/20 LCAP.

Annual Measurable Outcomes

For each goal in the prior year, identify and review the actual measurable outcomes as compared to the expected annual measurable outcomes identified in the prior year for the goal.

Actions/Services

Identify the planned Actions/Services and the budgeted expenditures to implement these actions toward achieving the described goal. Identify the actual actions/services implemented to meet the described goal and the estimated actual annual expenditures to implement the actions/services. As applicable, identify any changes to the students or student groups served, or to the planned location of the actions/services provided.

Analysis

Using actual annual measurable outcome data, including data from the California School Dashboard, analyze whether the planned actions/services were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions/services to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process.
- Describe the overall effectiveness of the actions/services to achieve the articulated goal as measured by the LEA.
- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures. Minor variances in expenditures or a dollar-for-dollar accounting is not required.
- Describe any changes made to this goal, expected outcomes, metrics, or actions and services to achieve this goal as a result of this analysis and analysis of the data provided in the California School Dashboard, as applicable. Identify where those changes can be found in the LCAP.

Stakeholder Engagement

Meaningful engagement of parents, students, and other stakeholders, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. EC identifies the minimum consultation requirements for school districts and county offices of education as consulting with teachers, principals, administrators, other school personnel, local bargaining units of the school district, parents, and pupils in developing the LCAP. EC requires

charter schools to consult with teachers, principals, administrators, other school personnel, parents, and pupils in developing the LCAP. In addition, EC Section 48985 specifies the requirements for the translation of notices, reports, statements, or records sent to a parent or guardian.

The LCAP should be shared with, and LEAs should request input from, school site-level advisory groups, as applicable (e.g., school site councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between school-site and district-level goals and actions. An LEA may incorporate or reference actions described in other plans that are being undertaken to meet specific goals.

Instructions: The stakeholder engagement process is an ongoing, annual process. The requirements for this section are the same for each year of a three-year LCAP. When developing the LCAP, enter the appropriate LCAP year, and describe the stakeholder engagement process used to develop the LCAP and Annual Update. When developing the LCAP in year 2 or year 3, enter the appropriate LCAP year and replace the previous stakeholder narrative(s) and describe the stakeholder engagement process used to develop the current year LCAP and Annual Update.

School districts and county offices of education: Describe the process used to consult with the Parent Advisory Committee, the English Learner Parent Advisory Committee, parents, students, school personnel, the LEA's local bargaining units, and the community to inform the development of the LCAP and the annual review and analysis for the indicated LCAP year.

Charter schools: Describe the process used to consult with teachers, principals, administrators, other school personnel, parents, and students to inform the development of the LCAP and the annual review and analysis for the indicated LCAP year.

Describe how the consultation process impacted the development of the LCAP and annual update for the indicated LCAP year, including the goals, actions, services, and expenditures.

Goals, Actions, and Services

LEAs must include a description of the annual goals, for all students and each LCFF identified group of students, to be achieved for each state priority as applicable to type of LEA. An LEA may also include additional local priorities. This section shall also include a description of the specific planned actions an LEA will take to meet the identified goals, and a description of the expenditures required to implement the specific actions.

School districts and county offices of education: The LCAP is a three-year plan, which is reviewed and updated annually, as required.

Charter schools: The number of years addressed in the LCAP may align with the term of the charter schools budget, typically one year, which is submitted to the school's authorizer. If year 2 and/or year 3 is not applicable, charter schools must specify as such.

New, Modified, Unchanged

As part of the LCAP development process, which includes the annual update and stakeholder engagement, indicate if the goal, identified need, related state and/or local priorities, and/or expected annual measurable outcomes for the current LCAP year or future LCAP years are modified or unchanged from the previous year's LCAP; or, specify if the goal is new.

Goal

State the goal. LEAs may number the goals using the “Goal #” box for ease of reference. A goal is a broad statement that describes the desired result to which all actions/services are directed. A goal answers the question: What is the LEA seeking to achieve?

Related State and/or Local Priorities

List the state and/or local priorities addressed by the goal. The LCAP must include goals that address each of the state priorities, as applicable to the type of LEA, and any additional local priorities; however, one goal may address multiple priorities. ([Link to State Priorities](#))

Identified Need

Describe the needs that led to establishing the goal. The identified needs may be based on quantitative or qualitative information, including, but not limited to, results of the annual update process or performance data from the California School Dashboard, as applicable.

Expected Annual Measurable Outcomes

For each LCAP year, identify the metric(s) or indicator(s) that the LEA will use to track progress toward the expected outcomes. LEAs may identify metrics for specific student groups. Include in the baseline column the most recent data associated with this metric or indicator available at the time of adoption of the LCAP for the first year of the three-year plan. The most recent data associated with a metric or indicator includes data as reported in the annual update of the LCAP year immediately preceding the three-year plan, as applicable. The baseline data shall remain unchanged throughout the three-year LCAP. In the subsequent year columns, identify the progress to be made in each year of the three-year cycle of the LCAP. Consider how expected outcomes in any given year are related to the expected outcomes for subsequent years.

The metrics may be quantitative or qualitative, but at minimum an LEA must use the applicable required metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. For the student engagement priority metrics, as applicable, LEAs must calculate the rates as described in the [LCAP Template Appendix, sections \(a\) through \(d\)](#).

Planned Actions/Services

For each action/service, the LEA must complete either the section “For Actions/Services not included as contributing to meeting Increased or Improved Services Requirement” or the section “For Actions/Services included as contributing to meeting the Increased or Improved Services Requirement.” The LEA shall not complete both sections for a single action.

For Actions/Services Not Contributing to Meeting the Increased or Improved Services Requirement

Students to be Served

The “Students to be Served” box is to be completed for all actions/services except for those which are included by the LEA as contributing to meeting the requirement to increase or improve services for unduplicated students. Indicate in this box which students will benefit from the actions/services by entering “All”, “Students with Disabilities”, or “Specific Student Group(s)”. If “Specific Student Group(s)” is entered, identify the specific student group(s) as appropriate.

Location(s)

Identify the location where the action/services will be provided. If the services are provided to all schools within the LEA, the LEA must identify "All Schools". If the services are provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans". Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades K-5), as appropriate.

Charter schools operating more than one site, authorized within the same charter petition, may choose to distinguish between sites by entering "Specific Schools" and identifying the site(s) where the actions/services will be provided. For charter schools operating only one site, "All Schools" and "Specific Schools" may be synonymous and, therefore, either would be appropriate. Charter schools may use either term provided they are used in a consistent manner through the LCAP.

For Actions/Services Contributing to Meeting the Increased or Improved Services Requirement:

Students to be Served

For any action/service contributing to the LEA's overall demonstration that it has increased or improved services for unduplicated students above what is provided to all students (see Demonstration of Increased or Improved Services for Unduplicated Students section, below), the LEA must identify the unduplicated student group(s) being served.

Scope of Service

For each action/service contributing to meeting the increased or improved services requirement, identify the scope of service by indicating "LEA-wide", "Schoolwide", or "Limited to Unduplicated Student Group(s)". The LEA must identify one of the following three options:

- If the action/service is being funded and provided to upgrade the entire educational program of the LEA, enter "LEA-wide."
- If the action/service is being funded and provided to upgrade the entire educational program of a particular school or schools, enter "schoolwide".
- If the action/service being funded and provided is limited to the unduplicated students identified in "Students to be Served", enter "Limited to Unduplicated Student Group(s)".

For charter schools and single-school school districts, "LEA-wide" and "Schoolwide" may be synonymous and, therefore, either would be appropriate. For charter schools operating multiple schools (determined by a unique CDS code) under a single charter, use "LEA-wide" to refer to all schools under the charter and use "Schoolwide" to refer to a single school authorized within the same charter petition. Charter schools operating a single school may use "LEA-wide" or "Schoolwide" provided these terms are used in a consistent manner through the LCAP.

Location(s)

Identify the location where the action/services will be provided. If the services are provided to all schools within the LEA, the LEA must indicate "All Schools". If the services are provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans". Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades K-5), as appropriate.

Charter schools operating more than one site, authorized within the same charter petition, may choose to distinguish between sites by entering “Specific Schools” and identify the site(s) where the actions/services will be provided. For charter schools operating only one site, “All Schools” and “Specific Schools” may be synonymous and, therefore, either would be appropriate. Charter schools may use either term provided they are used in a consistent manner through the LCAP.

Actions/Services

For each LCAP year, identify the actions to be performed and services provided to meet the described goal. Actions and services that are implemented to achieve the identified goal may be grouped together. LEAs may number the action/service using the “Action #” box for ease of reference.

New/Modified/Unchanged:

- Enter “New Action” if the action/service is being added in any of the three years of the LCAP to meet the articulated goal.
- Enter “Modified Action” if the action/service was included to meet an articulated goal and has been changed or modified in any way from the prior year description.
- Enter “Unchanged Action” if the action/service was included to meet an articulated goal and has not been changed or modified in any way from the prior year description.
 - If a planned action/service is anticipated to remain unchanged for the duration of the plan, an LEA may enter “Unchanged Action” and leave the subsequent year columns blank rather than having to copy/paste the action/service into the subsequent year columns. Budgeted expenditures may be treated in the same way as applicable.

Note: The goal from the prior year may or may not be included in the current three-year LCAP. For example, when developing year 1 of the LCAP, the goals articulated in year 3 of the preceding three-year LCAP will be from the prior year.

Charter schools may complete the LCAP to align with the term of the charter school’s budget that is submitted to the school’s authorizer. Accordingly, a charter school submitting a one-year budget to its authorizer may choose not to complete the year 2 and year 3 portions of the “Goals, Actions, and Services” section of the template. If year 2 and/or year 3 is not applicable, charter schools must specify as such.

Budgeted Expenditures

For each action/service, list and describe budgeted expenditures for each school year to implement these actions, including where those expenditures can be found in the LEA’s budget. The LEA must reference all fund sources for each proposed expenditure. Expenditures must be classified using the California School Accounting Manual as required by EC sections 52061, 52067, and 47606.5.

Expenditures that are included more than once in an LCAP must be indicated as a duplicated expenditure and include a reference to the goal and action/service where the expenditure first appears in the LCAP.

If a county superintendent of schools has jurisdiction over a single school district, and chooses to complete a single LCAP, the LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted expenditures are aligned.

Demonstration of Increased or Improved Services for Unduplicated Students

This section must be completed for each LCAP year. When developing the LCAP in year 2 or year 3, copy the "Demonstration of Increased or Improved Services for Unduplicated Students" table and enter the appropriate LCAP year. Using the copy of the section, complete the section as required for the current year LCAP. Retain all prior year sections for each of the three years within the LCAP.

Estimated Supplemental and Concentration Grant Funds

Identify the amount of funds in the LCAP year calculated on the basis of the number and concentration of low income, foster youth, and English learner students as determined pursuant to California Code of Regulations, Title 5 (5 CCR) Section 15496(a)(5).

Percentage to Increase or Improve Services

Identify the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 CCR Section 15496(a)(7).

Consistent with the requirements of 5 CCR Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. This description must address how the action(s)/service(s) limited for one or more unduplicated student group(s), and any schoolwide or districtwide action(s)/service(s) supported by the appropriate description, taken together, result in the required proportional increase or improvement in services for unduplicated pupils.

If the overall increased or improved services include any actions/services being funded and provided on a schoolwide or districtwide basis, identify each action/service and include the required descriptions supporting each action/service as follows.

For those services being provided on an LEA-wide basis:

- For school districts with an unduplicated pupil percentage of 55% or more, and for charter schools and county offices of education: Describe how these services are **principally directed to** and **effective in** meeting its goals for unduplicated pupils in the state and any local priorities.
- For school districts with an unduplicated pupil percentage of less than 55%: Describe how these services are **principally directed to** and **effective in** meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the services are **the most effective use of the funds to** meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience or educational theory.

For school districts only, identify in the description those services being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis:

- For schools with 40% or more enrollment of unduplicated pupils: Describe how these services are **principally directed to** and **effective in** meeting its goals for its unduplicated pupils in the state and any local priorities.
- For school districts expending funds on a schoolwide basis at a school with less than 40% enrollment of unduplicated pupils: Describe how these services are **principally directed to** and how the services are **the most effective use of the funds to** meet its goals for English learners, low income students and foster youth, in the state and any local priorities.

State Priorities

Priority 1: Basic Services addresses the degree to which:

- A. Teachers in the LEA are appropriately assigned and fully credentialed in the subject area and for the pupils they are teaching;
- B. Pupils in the school district have sufficient access to the standards-aligned instructional materials; and
- C. School facilities are maintained in good repair.

Priority 2: Implementation of State Standards addresses:

- A. The implementation of state board adopted academic content and performance standards for all students, which are:
 - a. English Language Arts – Common Core State Standards (CCSS) for English Language Arts
 - b. Mathematics – CCSS for Mathematics
 - c. English Language Development (ELD)
 - d. Career Technical Education
 - e. Health Education Content Standards
 - f. History-Social Science
 - g. Model School Library Standards
 - h. Physical Education Model Content Standards
 - i. Next Generation Science Standards
 - j. Visual and Performing Arts
 - k. World Language; and
- B. How the programs and services will enable English learners to access the CCSS and the ELD standards for purposes of gaining academic content knowledge and English language proficiency.

Priority 3: Parental Involvement addresses:

- A. The efforts the school district makes to seek parent input in making decisions for the school district and each individual school site;
- B. How the school district will promote parental participation in programs for unduplicated pupils; and
- C. How the school district will promote parental participation in programs for individuals with exceptional needs.

Priority 4: Pupil Achievement as measured by all of the following, as applicable:

- A. Statewide assessments;
- B. The Academic Performance Index;
- C. The percentage of pupils who have successfully completed courses that satisfy University of California (UC) or California State University (CSU) entrance requirements, or programs of study that align with state board approved career technical educational standards and framework;
- D. The percentage of English learner pupils who make progress toward English proficiency as measured by the California English Language Development Test (CELDT);
- E. The English learner reclassification rate;
- F. The percentage of pupils who have passed an advanced placement examination with a score of 3 or higher; and
- G. The percentage of pupils who participate in, and demonstrate college preparedness pursuant to, the Early Assessment Program, or any subsequent assessment of college preparedness.

Priority 5: Pupil Engagement as measured by all of the following, as applicable:

- A. School attendance rates;
- B. Chronic absenteeism rates;
- C. Middle school dropout rates;
- D. High school dropout rates; and
- E. High school graduation rates;

Priority 6: School Climate as measured by all of the following, as applicable:

- A. Pupil suspension rates;
- B. Pupil expulsion rates; and
- C. Other local measures, including surveys of pupils, parents, and teachers on the sense of safety and school connectedness.

Priority 7: Course Access addresses the extent to which pupils have access to and are enrolled in:

- A. S broad course of study including courses described under *EC* sections 51210 and 51220(a)-(i), as applicable;
- B. Programs and services developed and provided to unduplicated pupils; and
- C. Programs and services developed and provided to individuals with exceptional needs.

Priority 8: Pupil Outcomes addresses pupil outcomes, if available, for courses described under *EC* sections 51210 and 51220(a)-(i), as applicable.

Priority 9: Coordination of Instruction of Expelled Pupils (COE Only) addresses how the county superintendent of schools will coordinate instruction of expelled pupils.

Priority 10. Coordination of Services for Foster Youth (COE Only) addresses how the county superintendent of schools will coordinate services for foster children, including:

- A. Working with the county child welfare agency to minimize changes in school placement
- B. Providing education-related information to the county child welfare agency to assist in the delivery of services to foster children, including educational status and progress information that is required to be included in court reports;
- C. Responding to requests from the juvenile court for information and working with the juvenile court to ensure the delivery and coordination of necessary educational services; and
- D. Establishing a mechanism for the efficient expeditious transfer of health and education records and the health and education passport.

Local Priorities address:

- A. Local priority goals; and
- B. Methods for measuring progress toward local goals.

APPENDIX A: PRIORITIES 5 AND 6 RATE CALCULATION INSTRUCTIONS

For the purposes of completing the LCAP in reference to the state priorities under *EC* sections 52060 and 52066, as applicable to type of LEA, the following shall apply:

(a) “Chronic absenteeism rate” shall be calculated as follows:

- (1) The number of K-8 students who were absent 10 percent or more of the school days excluding students who were:
 - (A) enrolled less than 31 days
 - (B) enrolled at least 31 days but did not attend at least one day
 - (C) flagged as exempt in the district attendance submission. K-8 students are considered to be exempt if they:
 - (i) are enrolled in a Non-Public School
 - (ii) receive instruction through a home or hospital instructional setting
 - (iii) are attending a community college full-time.
- (2) The number of students who meet the enrollment requirements.
- (3) Divide (1) by (2).

(b) “High school dropout rate” shall be calculated as follows:

- (1) The number of cohort members who dropout by the end of year 4 in the cohort where “cohort” is defined as the number of first-time grade 9 pupils in year 1 (starting cohort) plus pupils who transfer in, minus pupils who transfer out, emigrate, or die during school years 1, 2, 3, and 4.
- (2) The total number of cohort members.
- (3) Divide (1) by (2).

(c) “High school graduation rate” shall be calculated as follows:

(1) For a 4-Year Cohort Graduation Rate:

- (A) The number of students in the cohort who earned a regular high school diploma by the end of year 4 in the cohort.
- (B) The total number of students in the cohort.
- (C) Divide (1) by (2).

(2) For a Dashboard Alternative Schools Status (DASS) Graduation Rate:

- (A) The number of students who either graduated as grade 11 students or who earned any of the following:
 - (i) a regular high school diploma
 - (ii) a High School Equivalency Certificate
 - (iii) an adult education diploma
 - (iv) a Certificate of Completion and was eligible for the California Alternative Assessment if under the age of 20.
- (B) The number of students in the DASS graduation cohort.
- (C) Divide (1) by (2).

(d) “Suspension rate” shall be calculated as follows:

- (1) The unduplicated count of pupils involved in one or more incidents for which the pupil was suspended during the academic year (July 1 – June 30).
- (2) The unduplicated count of pupils with a primary, secondary, or short-term enrollment during the academic year (July 1 – June 30).
- (3) Divide (1) by (2).

(e) “Expulsion rate” shall be calculated as follows:

- (1) The unduplicated count of pupils involved in one or more incidents for which the pupil was expelled during the academic year (July 1 – June 30).
- (2) The unduplicated count of pupils with a primary, secondary, or short-term enrollment during the academic year (July 1 – June 30).

(3) Divide (1) by (2).

NOTE: Authority cited: Sections 42238.07 and 52064, *Education Code*. Reference: Sections 2574, 2575, 42238.01, 42238.02, 42238.03, 42238.07, 47605, 47605.6, 47606.5, 48926, 52052, 52060, 52061, 52062, 52063, 52064, 52066, 52067, 52068, 52069, 52070, 52070.5, and 64001,; 20 U.S.C. Sections 6312 and 6314.

APPENDIX B: GUIDING QUESTIONS

Guiding Questions: Annual Review and Analysis

- 1) How have the actions/services addressed the needs of all pupils and did the provisions of those services result in the desired outcomes?
- 2) How have the actions/services addressed the needs of all subgroups of pupils identified pursuant to EC Section 52052, including, but not limited to, English learners, low-income pupils, and foster youth; and did the provision of those actions/services result in the desired outcomes?
- 3) How have the actions/services addressed the identified needs and goals of specific school sites and were these actions/services effective in achieving the desired outcomes?
- 4) What information (e.g., quantitative and qualitative data/metrics) was examined to review progress toward goals in the annual update?
- 5) What progress has been achieved toward the goal and expected measurable outcome(s)? How effective were the actions and services in making progress toward the goal? What changes to goals, actions, services, and expenditures are being made in the LCAP as a result of the review of progress and assessment of the effectiveness of the actions and services?
- 6) What differences are there between budgeted expenditures and estimated actual annual expenditures? What were the reasons for any differences?

Guiding Questions: Stakeholder Engagement

- 1) How have applicable stakeholders (e.g., parents and pupils, including parents of unduplicated pupils and unduplicated pupils identified in *EC* Section 42238.01; community members; local bargaining units; LEA personnel; county child welfare agencies; county office of education foster youth services programs, court-appointed special advocates, and other foster youth stakeholders; community organizations representing English learners; and others as appropriate) been engaged and involved in developing, reviewing, and supporting implementation of the LCAP?
- 2) How have stakeholders been included in the LEA's process in a timely manner to allow for engagement in the development of the LCAP?
- 3) What information (e.g., quantitative and qualitative data/metrics) was made available to stakeholders related to the state priorities and used by the LEA to inform the LCAP goal setting process? How was the information made available?
- 4) What changes, if any, were made in the LCAP prior to adoption as a result of written comments or other feedback received by the LEA through any of the LEA's engagement processes?
- 5) What specific actions were taken to meet statutory requirements for stakeholder engagement pursuant to *EC* sections 52062, 52068, or 47606.5, as applicable, including engagement with representatives of parents and guardians of pupils identified in *EC* Section 42238.01?
- 6) What specific actions were taken to consult with pupils to meet the requirements 5 *CCR* Section 15495(a)?

- 7) How has stakeholder involvement been continued and supported? How has the involvement of these stakeholders supported improved outcomes for pupils, including unduplicated pupils, related to the state priorities?

Guiding Questions: Goals, Actions, and Services

- 1) What are the LEA's goal(s) to address state priorities related to "Conditions of Learning": Basic Services (Priority 1), the Implementation of State Standards (Priority 2), and Course Access (Priority 7)?
- 2) What are the LEA's goal(s) to address state priorities related to "Pupil Outcomes": Pupil Achievement (Priority 4), Pupil Outcomes (Priority 8), Coordination of Instruction of Expelled Pupils (Priority 9 – COE Only), and Coordination of Services for Foster Youth (Priority 10 – COE Only)?
- 3) What are the LEA's goal(s) to address state priorities related to parent and pupil "Engagement": Parental Involvement (Priority 3), Pupil Engagement (Priority 5), and School Climate (Priority 6)?
- 4) What are the LEA's goal(s) to address any locally-identified priorities?
- 5) How have the unique needs of individual school sites been evaluated to inform the development of meaningful district and/or individual school site goals (e.g., input from site level advisory groups, staff, parents, community, pupils; review of school level plans; in-depth school level data analysis, etc.)?
- 6) What are the unique goals for unduplicated pupils as defined in *EC* Section 42238.01 and groups as defined in *EC* Section 52052 that are different from the LEA's goals for all pupils?
- 7) What are the specific expected measurable outcomes associated with each of the goals annually and over the term of the LCAP?
- 8) What information (e.g., quantitative and qualitative data/metrics) was considered/reviewed to develop goals to address each state or local priority?
- 9) What information was considered/reviewed for individual school sites?
- 10) What information was considered/reviewed for subgroups identified in *EC* Section 52052?
- 11) What actions/services will be provided to all pupils, to subgroups of pupils identified pursuant to *EC* Section 52052, to specific school sites, to English learners, to low-income pupils, and/or to foster youth to achieve goals identified in the LCAP?
- 12) How do these actions/services link to identified goals and expected measurable outcomes?
- 13) What expenditures support changes to actions/services as a result of the goal identified? Where can these expenditures be found in the LEA's budget?

Prepared by the California Department of Education, January 2019

LCAP Expenditure Summary

Total Expenditures by Funding Source						
Funding Source	2018-19 Annual Update Budgeted	2018-19 Annual Update Actual	2017-18	2018-19	2019-20	2017-18 through 2019-20 Total
All Funding Sources	0.00	0.00	0.00	0.00	5,264,088.00	5,264,088.00
LCFF Base	0.00	0.00	0.00	0.00	4,811,422.00	4,811,422.00
LCFF SC	0.00	0.00	0.00	0.00	452,666.00	452,666.00

* Totals based on expenditure amounts in goal and annual update sections.

Total Expenditures by Object Type						
Object Type	2018-19 Annual Update Budgeted	2018-19 Annual Update Actual	2017-18	2018-19	2019-20	2017-18 through 2019-20 Total
All Expenditure Types	0.00	0.00	0.00	0.00	5,264,088.00	5,264,088.00
1000-1999: Certificated Personnel Salaries	0.00	0.00	0.00	0.00	3,199,166.00	3,199,166.00
4000-4999: Books And Supplies	0.00	0.00	0.00	0.00	322,694.00	322,694.00
5000-5999: Services And Other Operating Expenditures	0.00	0.00	0.00	0.00	1,432,956.00	1,432,956.00
5800: Professional/Consulting Services And Operating Expenditures	0.00	0.00	0.00	0.00	309,272.00	309,272.00

* Totals based on expenditure amounts in goal and annual update sections.

Total Expenditures by Object Type and Funding Source							
Object Type	Funding Source	2018-19 Annual Update Budgeted	2018-19 Annual Update Actual	2017-18	2018-19	2019-20	2017-18 through 2019-20 Total
All Expenditure Types	All Funding Sources	0.00	0.00	0.00	0.00	5,264,088.00	5,264,088.00
1000-1999: Certificated Personnel Salaries	LCFF Base	0.00	0.00	0.00	0.00	2,746,500.00	2,746,500.00
1000-1999: Certificated Personnel Salaries	LCFF SC	0.00	0.00	0.00	0.00	452,666.00	452,666.00
4000-4999: Books And Supplies	LCFF Base	0.00	0.00	0.00	0.00	322,694.00	322,694.00
5000-5999: Services And Other Operating Expenditures	LCFF Base	0.00	0.00	0.00	0.00	1,432,956.00	1,432,956.00
5800: Professional/Consulting Services And Operating Expenditures	LCFF Base	0.00	0.00	0.00	0.00	309,272.00	309,272.00

* Totals based on expenditure amounts in goal and annual update sections.

Total Expenditures by Goal						
Goal	2018-19 Annual Update Budgeted	2018-19 Annual Update Actual	2017-18	2018-19	2019-20	2017-18 through 2019-20 Total
Goal 1	0.00	0.00	0.00	0.00	4,202,137.00	4,202,137.00
Goal 2	0.00	0.00	0.00	0.00	422,694.00	422,694.00
Goal 3	0.00	0.00	0.00	0.00	0.00	0.00
Goal 4	0.00	0.00	0.00	0.00	639,257.00	639,257.00

* Totals based on expenditure amounts in goal and annual update sections.

Expenditures Contributing to Increased/Improved Requirement by Funding Source					
Funding Source	2018-19 Annual Update Budgeted	2018-19 Annual Update Actual	2017-18	2018-19	2019-20
All Funding Sources					

Expenditures NOT Contributing to Increased/Improved Requirement by Funding Source					
Funding Source	2018-19 Annual Update Budgeted	2018-19 Annual Update Actual	2017-18	2018-19	2019-20
All Funding Sources					

	TK-8			HS		
Enrollment Date Range	Total Fund Amount	Funds upon Enrollment	Funds Drop Dec 1.	Total Fund Amount	Funds upon Enrollment	Funds Drop Dec 1.
7/1-10/9	\$2,600.00	\$1,500.00	\$1,100.00	\$2,800.00	\$1,700.00	\$1,100.00
10/10-11/1	\$1,500.00	\$400.00	\$1,100.00	\$1,700.00	\$600.00	\$1,100.00
11/2-1/29	\$1,100.00	\$1,100.00	\$0.00	\$1,100.00	\$1,100.00	\$0.00
1/30-3/31	\$500.00	\$500.00	\$0.00	\$700.00	\$700.00	\$0.00



Monarch River Academy Instructional Calendar

2020-2021 School Calendar

July '20						
Su	M	Tu	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

August '20						
Su	M	Tu	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

September '20						
Su	M	Tu	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

10 - Inst Days (IDs)

21 - IDs

October '20						
Su	M	Tu	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

November '20						
Su	M	Tu	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

December '20						
Su	M	Tu	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

22 - IDs

14 - IDs

11 - IDs

January '21						
Su	M	Tu	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

1 sem 5 IDs; 2 sem 14 IDs

February '21						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

18 IDs

March '21						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

20 IDs

April '21						
Su	M	Tu	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

19 IDs

May '21						
Su	M	Tu	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

20 IDs

June '21						
Su	M	Tu	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

4 IDs



School Closed/Holidays



Teacher in-Service Day (no school for students)

School Closed/Holidays:

09/07/20: Labor Day
11/11/20: Veterans Day
11/26/20: Thanksgiving Day
12/24/20: Christmas Eve
12/25/20: Christmas Day
12/31/20: New Years Eve
01/01/21: New Years Day
01/18/21: Martin Luther King Jr. Day
02/15/21: Presidents' Day
02/22/21: Second Monday off in February
04/04/21: Easter Day
04/14/21: P2 we would like as many instructional days as possible before P2
05/31/21: Memorial Day

Key Dates & Metrix

1st Day of School Tuesday, August 18
Last Day of 1st Semester Friday, January 8, 2021
83 instructional days 1st semester
1st Day Second Semester Monday, January 11
142 Instruction Days through April 14 (P2)
Last day of school Friday, June 4
95 instruction days 2nd semester
178 instruction days



Monarch River Academy Certificated Calendar

2020-2021 School Calendar

July '20						
Su	M	Tu	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

5 Days

August '20						
Su	M	Tu	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

18 Days

September '20						
Su	M	Tu	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

21 IDs

October '20						
Su	M	Tu	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

22 Days

November '20						
Su	M	Tu	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

14 Days

December '20						
Su	M	Tu	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

11 Days

January '21						
Su	M	Tu	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

1sem 5 D; 2sem 14 D

February '21						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

18

March '21						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

20 Days

April '21						
Su	M	Tu	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

19 Days

May '21						
Su	M	Tu	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

20 Days

June '21						
Su	M	Tu	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

9 Days



School Closed/Holidays



Teacher in-Service Day (no school for students)

School Closed/Holidays:

09/07/20: Labor Day
11/11/20: Veterans Day
11/26/20: Thanksgiving Day
12/24/20: Christmas Eve
12/25/20: Christmas Day
12/31/20: New Years Eve
01/01/21: New Years Day
01/18/21: Martin Luther King Jr. Day
02/15/21: Presidents' Day
02/22/21: Second Monday off in February
04/04/21: Easter Day
04/14/21: P2 we would like as many instructional days as possible before P2
05/31/21: Memorial Day

Key Dates & Metrix

1st Day of School Tuesday, August 18
Last Day of 1st Semester Friday, January 8, 2021
83 instructional days 1st semester
1st Day Second Semester Monday, January 11
142 Instruction Days through April 14 (P2)
Last day of school Friday, June 4
95 instruction days 2nd semester
178 instruction days
195 work days for teachers



MONARCH RIVER ACADEMY

Senior Director Evaluation Form

Name:	Date:
--------------	--------------

Type of Review:

☐ Annual ☐ Other

Senior Directors shall be provided feedback on their performance throughout the year with a formal evaluation conducted annually. The purpose of the evaluation is to provide Senior Directors with information on their performance and behavior in order to reinforce their strengths, to provide Teachers with an opportunity to participate in appropriate professional development activities, and to jointly formulate goals and performance development plans, as necessary. All ratings of "Rarely" shall include specific examples of behaviors/performance that require improvement and a detailed plan for the employee to grow.

Rating Scale:

3	Usually
2	Sometimes
1	Rarely

California Professional Standards for Education Leaders (CPSEL) Standards, Elements, and Example Indicators

STANDARD 1: Development and Implementation of a Shared Vision Education leaders facilitate the development and implementation of a shared vision of learning and growth of all students.	Principal Rating (1-3 Scale)	Narrative/Evidence	Supervisor Rating (1-3 Scale)
ELEMENT 1A Student-Centered Vision Leaders shape a collective vision that uses multiple measures of data and focuses on equitable access, opportunities, and outcomes for all students.			
ELEMENT 1B Developing Shared Vision Leaders engage others in a collaborative process to develop a vision of teaching and learning that is shared and supported by all stakeholders.			
ELEMENT 1C Vision Planning and Implementation Leaders guide and monitor decisions, actions, and outcomes using the shared vision and goals.			

STANDARD 2: Instructional Leadership Education leaders shape a collaborative culture of teaching and learning, informed by professional standards and focused on student and professional growth.	Principal Rating (1-3 Scale)	Narrative/Evidence	Supervisor Rating (1-3 Scale)
ELEMENT 2A Professional Learning Culture Leaders promote a culture in which staff engage in individual and collective professional learning that results in their continuous improvement and high performance.			
ELEMENT 2B Curriculum and Instruction Leaders guide and support the implementation of standards-based curriculum, instruction, and assessments that address student expectations and outcomes.			
ELEMENT 2C Assessment and Accountability Leaders develop and use assessment and accountability systems to monitor, improve, and extend educator practice, program outcomes, and student learning.			
STANDARD 3: Management and Learning Environment Education leaders manage the organization to cultivate a safe and productive learning and working environment.	Principal Rating (1-3 Scale)	Narrative/Evidence	Supervisor Rating (1-3 Scale)
ELEMENT 3A Operations and Facilities Leaders provide and oversee a functional, safe, and clean learning environment.			
ELEMENT 3B Plans and Procedures Leaders establish structures and employ policies and processes that support students to graduate ready for college and career.			
ELEMENT 3C Climate Leaders facilitate safe, fair, and respectful environments that meet the intellectual, linguistic, cultural, social-emotional, and physical needs of each learner.			
ELEMENT 3D Fiscal and Human Resources Leaders align fiscal and human resources and manage policies and contractual agreements that build a productive learning environment.			
STANDARD 4: Family and Community Engagement Education leaders collaborate with families and other stakeholders to address diverse student and community interests and mobilize community resources.	Principal Rating (1-3 Scale)	Narrative/Evidence	Supervisor Rating (1-3 Scale)
ELEMENT 4A Parent and Family Engagement Leaders meaningfully involve all parents and families, including underrepresented communities, in student learning and support programs.			

<p>ELEMENT 4B Community Partnerships</p> <p>Leaders establish community partnerships that promote and support students to meet performance and content expectations and graduate ready for college and career.</p>			
<p>ELEMENT 4C Community Resources and Services</p> <p>Leaders leverage and integrate community resources and services to meet the varied needs of all students.</p>			
<p>STANDARD 5: Ethics and Integrity Education leaders make decisions, model, and behave in ways that demonstrate professionalism, ethics, integrity, justice, and equity and hold staff to the same standard.</p>	<p>Principal Rating (1-3 Scale)</p>	<p>Narrative/Evidence</p>	<p>Supervisor Rating (1-3 Scale)</p>
<p>ELEMENT 5A Reflective Practice</p> <p>Leaders act upon a personal code of ethics that requires continuous reflection and learning.</p>			
<p>ELEMENT 5B Ethical Decision-Making</p> <p>Leaders guide and support personal and collective actions that use relevant evidence and available research to make fair and ethical decisions.</p>			
<p>ELEMENT 5C Ethical Action</p> <p>Leaders recognize and use their professional influence with staff and the community to develop a climate of trust, mutual respect, and honest communication, necessary to consistently make fair and equitable decisions on behalf of all students.</p>			
<p>STANDARD 6: External Context and Policy Education leaders influence political, social, economic, legal, and cultural contexts affecting education to improve education policies and practices.</p>	<p>Principal Rating (1-3 Scale)</p>	<p>Narrative/Evidence</p>	<p>Supervisor Rating (1-3 Scale)</p>
<p>ELEMENT 6A Understanding and Communicating Policy</p> <p>Leaders actively structure and participate in opportunities that develop greater public understanding of the education policy environment.</p>			
<p>ELEMENT 6B Professional Influence</p> <p>Leaders use their understanding of social, cultural, economic, legal, and political contexts to shape policies that lead to all students graduating ready for college and career.</p>			
<p>ELEMENT 6C Policy Engagement</p> <p>Leaders engage with policymakers and stakeholders to collaborate on education policies focused on improving education for all students.</p>			
<p>Page 122 of 165</p>			

Teacher Performance Standards
Ideal Team Player

Performance Standards	Principal Rating (1-3 Scale)	Narrative/Evidence	Supervisor Rating (1-3 Scale)
1.0 Humble			
Compliments or praises teammates without hesitation			
Easily admits to mistakes			
Is willing to take on lower level work for the good of the team.			
Gladly share credit for team accomplishments			
Readily acknowledges his/her weaknesses			
Offers and accepts apologies graciously			
Total		Total	

Performance Standards	Principal Rating (1-3 Scale)	Narrative/Evidence	Supervisor Rating (1-3 Scale)
2.0 Hungry			
Does more than what is required of his/her job			
Has passion for the mission of the team			
Feels a sense of personal responsibility for the overall success of the team			
Is willing to contribute to and think about work outside of office hours			
Is willing to take on tedious or challenging tasks whenever necessary			
Looks for opportunities to contribute outside of his/her areas of responsibility			

Total		Total	

Performance Standards	Principal Rating (1-3 Scale)	Narrative/Evidence	Supervisor Rating (1-3 Scale)
3.0 Smart			
Generally understands what other people are feeling during meetings and conversations			
Shows empathy to others on the team			
Demonstrates an interest in the lives of his/her teammates			
Is an attentive listener			
Is aware of how his/her words and actions impact others on the team			
Adjusts his or her behavior and style to fit the nature of a conversation or relationship			
Total		Total	

Performance Standards	Principal Rating (1-3 Scale)	Narrative/Evidence	Supervisor Rating (1-3 Scale)
4.0 Day-to-Day Responsibilities			
4.1 Communication <ul style="list-style-type: none"> Responds to all calls and emails in a timely manner. 			
4.2 Professional Standards <ul style="list-style-type: none"> Schedules and attends weekly/monthly meetings with families/students. Accurately completes all required paperwork and other work tasks by assigned due dates. Monitors, records, & ensures student progress goals are met each learning period. 			

<ul style="list-style-type: none"> • Attends all required meetings and trainings. • Arrives to meetings/events on time and ready to participate. 			
4.3 Individualizing Student Support <ul style="list-style-type: none"> • Provides and individualizes student support based on student needs. • Ensures that all accommodations are met • Connects state standards in student learning objectives. • Applies knowledge of all offered curriculum options and homeschooling philosophies. 			
Total		Total	

Summary of Evaluation Scores		
Standards	Principal Rating Total	Supervisor Rating Total
1.0 Humble	_____ out of 18 possible	_____ out of 18 possible
2.0 Hungry	_____ out of 18 possible	_____ out of 18 possible
3.0 Smart	_____ out of 18 possible	_____ out of 18 possible
4.0 Day-to-Day Responsibilities	_____ out of 9 possible	_____ out of 9 possible
State Testing Participation	_____ student opt-outs	_____ % participation
Principal Self Reflection:		

What virtue is most challenging for you? What is one way that you can grow to strengthen that virtue to become an even more valuable member of the team? Consider this to be a goal you can set for yourself for the remainder of the year.

What virtue is your greatest strength? Discuss a way that this strength has helped you to excel in your role.

Final Administrator Comments: Areas of Strength/Commendation

Final Administrator Comments: Areas of Concern/Improvement Needed

☐ Yes, I would like to meet with my Director (Administrator) to review my evaluation.

☐ No, I do not wish to meet with my Director (Administrator) unless he/she deems it necessary.

My signature indicates I have reviewed/discussed this evaluation with my supervisor, but does not necessarily indicate agreement. If I do not agree with this evaluation, I understand that I have ten (10) working days to provide a written response, which will be attached to this evaluation and placed in my personnel file.

Principal Signature

Date

Evaluator/Administrative Signature

Date

Print Name of Evaluator/Administrator

Principal Comments/Written Response (may attached additional pages):



Public Random Drawing/Lottery Policy

Monarch River Academy is committed to providing quality education to all students who wish to attend, within the school boundaries. Based on available resources, it may be necessary to limit admissions, and in that event a Public Random Drawing/Lottery will be held to determine admission. Monarch River Academy ensures admission will not be based on any protected characteristics, including, but not limited to, disability, race, gender, national origin, and religion.

The purpose of the Monarch River Academy Governing Board approving the Public Random Drawing/Lottery Policy is to accomplish the following:

1. Establish the procedures under which the Monarch River Academy (“School”) will conduct the School’s public random drawing/lottery in the event that applications for enrollment exceed the School’s capacity.
- 1. Enrollment:** The School is a non-classroom based charter school that operates solely as an independent study program. Admission to the School is open to any student who resides within the boundaries of Tulare County or an adjacent county. The School will accept all students who wish to attend, so long as it has the capacity to serve them. The School’s Governing Board will annually determine the maximum enrollment for each school year based on, among other factors, the annual budget, staffing, and available resources prior to the start of the Open Enrollment Period. Limits may be established by grade level and for the school as a whole.

The Board will set an Open Enrollment Period each year. Applications will be accepted during the publicly advertised Open Enrollment Period each year for enrollment during the following school year. Following the close of the Open Enrollment Period, applications shall be counted to determine whether the School has received more applications than maximum enrollment capacity. If the number of pupils who wish to attend the School exceeds the School’s capacity for a specific grade level, enrollment in the impacted grade level or levels will be determined by a Lottery conducted in accordance with the procedures set forth in this Policy and applicable law. Admission preferences will only be extended consistent with this Policy, the School’s charter, and applicable law.

Admission preferences will not be based on any protected characteristics, including, but not limited to, disability, race, gender, national origin, and religion. In addition, enrollment preferences will not limit enrollment access for pupils with disabilities, academically low-achieving pupils, English learners, neglected or delinquent pupils, homeless pupils, or pupils who are economically disadvantaged, as determined by eligibility for any free or reduced-price meal program, or foster youth.

- 2. Lottery Procedures:** In the event that there are more students who wish to attend the School than there are spots available upon closure of the Open Enrollment Period, the School will conduct a Lottery during the Spring semester prior to the academic year for which enrollment is sought.

All pupils, except those who are guaranteed admission as provided in this Policy and the School's charter, who wish to enroll in the School must participate in the Lottery subject to the following:

1. Students who reside within the boundaries of the Westside Elementary School District ("District") will have their names placed in the Lottery pool twice.
2. Students who reside outside the boundaries of the District will have their names placed in the Lottery once.

The following students are exempt from the Lottery and are guaranteed enrollment in the School: (1) students currently enrolled in the School at the close of the Open Enrollment period; and (2) siblings of currently enrolled students. "Sibling" is defined as a pupil who has at least one biological or adoptive parent in common with the admitted pupil, or who has been legally adopted by or placed under the legal guardianship of at least one biological or adoptive parent of the admitted pupil. Step-siblings are only considered siblings if they reside at the same address as the sibling who is admitted into the School.

Public notice of the Open Enrollment Period and date of the Lottery will generally be posted on the School's website and the notice will provide the date, time, and location of the Lottery at least 10 days prior to the commencement of the Open Enrollment Period. This information will also be included in application forms. The Lottery will be conducted [by grade-level and] by the Principal or his/her designee using a random method of selection. Unique identifiers will be assigned to each applicant. The conduct of the Lottery will be open to the public and families are encouraged, but not required, to attend. The Principal or his/her designee will announce each applicant who is granted admission through the Lottery. Once the enrollment cap has been reached, the Principal or his/her designee will continue to drawing applicants will then be placed on the waitlist in the order drawn. Successful applicants will be notified electronically or by mail.

If a student is extended an offer of admission due to one of the preferences noted in this Policy or the School's charter, the School may request supporting documentation as part of the enrollment process. The School will conduct a verification of such documentation prior to finalizing the student's enrollment and may disqualify an applicant submitting materially false information.

After the Lottery process, and once an offer has been accepted by the family, additional information may be requested as part of the registration process. Following acceptance through the Lottery, students who are offered admission at the School at the time of the Lottery will have 10 calendar days to complete the registration process. If a student fails to timely complete the process, the spot may be filled from the waiting list.

Enrollment offers are valid only for the academic year for which the Lottery is conducted. There is no option to defer an offer of enrollment. Students accepting enrollment must

generally complete required independent study agreements within seven (7) days of the beginning of the school year, unless otherwise advised by the School.

- 3. Waitlist:** If a slot becomes available because an accepted student declines enrollment, fails to timely complete the enrollment process, a student leaves the School after the start of the academic year, or as spots become available, the School may notify families on the waitlist in the order they appear on the waitlist.

Students drawn from the waitlist shall have five (5) school days to accept the enrollment slot (via telephone or email to the School) and proceed with the registration process. Applicants must complete a registration packet with all required documentation and by the deadline given by the School to confirm enrollment.

Students who are not offered a spot for the academic school year for which the Lottery was held may remain on the waitlist for that academic year unless the parent or guardian requests that the student be removed from the waitlist earlier. The waitlist shall not carry over from one year to the next. Students who have not been admitted will be required to submit a new enrollment application for the next school year and are required to participate in the Lottery if space is limited.



Monarch River Academy

2293 East Crabtree Avenue, Porterville, CA 93257

Ph (559) 754-1442 | Fax (559) 335-4089

Emergency Procedures Guide

for

Monarch River Academy

Rev. February 2020

Table of Contents

Crisis Team Members	Pg. 3
Response to Any Emergency	Pg. 4
Staff Responsibilities	Pg. 5
Weather	Pg. 6
Fire	Pg. 7
Hazardous Materials	Pg. 8
Assault/Fights	Pg. 9
Bomb Threat	Pg. 10
Intruder/Hostage	Pg.11-12
Serious Injury/Death	Pg. 13
Earthquake	Pg. 14-15
Civil Disturbance, Violence on Campus	Pg. 16
Warning and Notification of Emergency	Pg. 17
Lock-Down Procedures	Pg. 18
Sheltering Procedures	Pg. 19
Terrorist Event	Pg. 20-21
Appendix	Pg. 22

-Definition of Staff Roles

-Phone Numbers for Community Agencies

-Evacuation Map (insert)

-Printable Evacuation Signs – “OK” & “Need Help”

(Print one set of OK & Need Help signs per teacher. Print OK sign on green paper or print on white paper & highlight/outline in green; print Need Help sign on red paper or print on white paper & highlight/outline in red)

-Incident Reports

Crisis Team Members

Crisis Team Advisors:

- Director of School Support: Chris Alcala 626-433-8075
- Director of School Accountability: Giovanna Arzaga 626-487-9943
- Deputy Executive Director: Kimmi Buzzard 562-584-0427
- Senior Director: Laurie Goodman 559-999-5030
- Assistant Director: Steph Johnson 559-943-4566
- Office Manager: Kim Robles 559-754-1442
- Triage Team: Staff members who are CPR & First Aid certified and called on to respond to medical emergencies or injuries before EMS arrives.
- First Aid Certified: Staff members who are First Aid Certified are called on to respond to medical emergencies or injuries before EMS arrives.
- Search & Rescue Team: This team will strategically sweep the premises for unaccounted staff/students when evacuation or sheltering orders are issued.

For the following roles the first person listed is primary. The second person steps in if the first person is absent.

- Hazards Team: Staff members designated to call for shut off of gas/water/reset fire alarm or seal off areas containing materials or persons who have become hazardous.
- Administrative Assistant: Staff member designated to ensure completion of incident reports and documentation of the emergency.
- Runner: Staff member(s) designated to collect roll sheets that determine any staff/students unaccounted for. First to be at pole out front to direct everyone to gather.
- Lock Down Code Word and Means of Issue Code Red: walkie talkie and text

Response to Any Emergency

- ☐ Notify 911 (if necessary) and your applicable Crisis Team members.
- ☐ Notify Triage Team in building of medical emergencies, if necessary.
- ☐ Seal off high-risk areas.
- ☐ Take charge of the area until the incident is contained or relieved.
- ☐ Preserve evidence. See appendix and fill out Incident Reports.

Staff Responsibilities

Emergency Team Members:

- ☐ Verify information.
- ☐ Call 911 (if necessary).
- ☐ Seal off high-risk areas.
- ☐ Notify Office Manager.
- ☐ Notify staff (depending on emergency).
- ☐ Evacuate staff if necessary.
- ☐ Notify community agencies if necessary.
- ☐ Keep detailed notes of the crisis event.

Coordinators:

- ☐ Verify information.
- ☐ Lock classroom doors, unless evacuation orders are issued.
- ☐ Warn staff, if advised.
- ☐ Account for all staff.
- ☐ Stay with staff during an evacuation. Take roster.
- ☐ Keep detailed notes of the crisis event.

Weather

Severe Weather Watch has been issued in an area near building

- Monitor Emergency Alert Stations (see EAS section) or NOAA Weather Stations (National Weather Service, Weather Channel).
- Bring all persons inside the building(s).
- Close windows and blinds.
- Review severe weather procedures and location of safe areas. Severe weather safe areas are under desks and in hallways away from windows and large rooms.
- Review “drop, cover and hold” procedures with students.

Severe Weather Warning has been issued in an area near building or severe weather has been spotted near building

- Shut off gas.
- Move staff to safe areas.
- Remind coordinators to take class rosters.
- Ensure that staff are in “drop, cover and hold” positions.
- Account for all staff.
- Remain in a safe area until the warning expires or until emergency personnel have issued an all-clear signal.

Fire

In the event of a fire, smoke from a fire or a gas odor has been detected:

- Team Member alerts team by shouting “Fire!”
- Evacuate staff to a safe distance outside of the building.
- Follow the normal fire drill route (as per map in Appendix). Follow alternate routes if the normal route is too dangerous.
- Coordinators take roster.
- Office Manager notifies police (call 911) and Site Administrator
- Coordinators ensure all staff are accounted for and give “all present” signal or activate Search & Rescue team.
- No one may re-enter building(s) until the entire building(s) is declared safe by fire or police personnel.

In the event of a fire alarm sounding:

Proceed quickly to an exit. Once you know you are to evacuate, proceed quickly to your nearest exit. Do not rush but move quickly.

Do not worry about gathering belongings that are not immediately within reach. Taking time to pack a bag or go to another room once an evacuation has been called is dangerous. Take only what is already on your person or already packed and within arm’s reach.

Meet outside at the designated meeting place to ensure all staff are accounted for and give “all present” signal or activate Search & Rescue team.

No one may re-enter building(s) until the entire building(s) is declared safe.

Hazardous Materials

Incident occurred in building

- ☐ Call 911.
- ☐ Notify Office Manager
- ☐ Office Manager notifies Site Administrator
- ☐ Hazards Team seals off area of leak/spill.
- ☐ Take charge of the area until fire personnel contain the incident.
- ☐ Fire officer in charge will recommend shelter or evacuation actions.
- ☐ Follow procedures for sheltering or evacuation.
- ☐ Resume normal operations after consulting with fire officials.

Incident occurred near building property

- ☐ Fire or Police will notify Office Manager
- ☐ Office Manager will notify Site Administrator
- ☐ Fire officers in charge of the scene will recommend shelter or evacuation actions.
- ☐ Follow procedures for sheltering or evacuation.
- ☐ Resume normal operations after consulting with fire officials.

Assault/Fights

- ☐ Ensure the safety of staff first.
- ☐ Call 911, if necessary.
- ☐ Notify the Triage Team in building of medical emergencies.
- ☐ Notify Office Manager
- ☐ Seal off the area where assault took place.
- ☐ Defuse situation, if possible.
- ☐ Office Manager notifies police if a weapon was used, victim has physical injury causing substantial pain or impairment of physical condition, or assault involved sexual contact (*intentional touching of anus, breast, buttocks or genitalia or another person in a sexual manner. This includes touching of those areas covered by clothing*).
- ☐ Office Manager notifies Site Administrator and School Support Administrator
- ☐ Document all activities. Ask victim(s)/witness (es) for their account of the incident.

Bomb Threat

Upon receiving a message that a bomb has been planted in building:

- ☐ Ask where the bomb is located, when will bomb go off, what materials are in bomb, who is calling, why caller is doing this.
- ☐ Listen closely to caller's voice and speech patterns and to noises in background.
- ☐ Notify Office Manager
- ☐ Office Manager orders evacuation of all persons inside building(s).
- ☐ Office Manager notifies police (call 911) and Site Administrator

Evacuation procedures:

- ☐ Office Manager warns staff. Do not mention "Bomb Threat". Use standard fire drill procedures (Use Code Black)
- ☐ Direct staff to take their belongings.
- ☐ Staff must be evacuated to a safe distance outside of building(s). After consulting with Office Manager, staff will be relocated.
- ☐ Coordinators take roll and compare to sign-in sheets after being evacuated.
- ☐ No one may reenter building(s) until fire or police personnel declare entire building(s) safe.
- ☐ Office Manager notifies staff of termination of emergency. Resume normal operations.

Intruder/Hostage

Intruder- An unauthorized person who enters the property

- ☐ Notify Office Manager
- ☐ Ask another staff person to accompany you before approaching the intruder.
- ☐ Politely greet the intruder and identify yourself.
- ☐ Ask intruder the purpose of his/her visit.
- ☐ Inform intruder that all visitors must register with Office Manager.
- ☐ If the intruder's purpose is not legitimate, ask him/her to leave. Accompany intruder to exit.

If intruder refuses to leave:

- ☐ Warn intruder of consequences for staying on the property. Inform him/her that you will call the police.
- ☐ Notify police and Office Manager if intruder still refuses to leave. Give the police a full description of the intruder.
- ☐ Walk away from intruder if he/she indicates a potential for violence. Be aware of intruder's actions at this time (where he/she is located in the building, whether he/she is carrying a weapon or package, etc.)

*Office Manager notifies Site Administrator and may issue lock-down procedures (see Lock-Down Procedures section).

Hostage

- ☐ If hostage taker is unaware of your presence, do not intervene.
- ☐ Call 911 immediately. Give dispatcher details of the situation; ask for assistance from the hostage negotiation team.
- ☐ Seal off area near hostage scene.
- ☐ Notify Office Manager
- ☐ Office Manager notifies Site Administrator
- ☐ Give control of the scene to the police and hostage negotiation team.
- ☐ Keep detailed notes of events.

If taken hostage:

- ☐ Follow instructions of hostage taker.
- ☐ Try not to panic. Calm staff if they are present.
- ☐ Treat the hostage taker as normally as possible.
- ☐ Be respectful to hostage taker.
- ☐ Ask permission to speak and do not argue or make suggestions.

Serious Injury/Death

If incident occurred in building

- ☐ Call 911.
- ☐ Notify CPR/first aid certified persons in building of medical emergencies.
- ☐ If possible, isolate affected student(s)/staff member(s).
- ☐ Notify Office Manager
- ☐ Office Manager notifies Site Administrator
- ☐ Designate staff person to accompany injured/ill person to hospital.
- ☐ Office Manager notifies family
- ☐ Determine method of notifying staff.
- ☐ Refer media to Deputy Executive Director.

Post-crisis intervention

- ☐ Meet with school staff to determine level of intervention for staff.
- ☐ Designate rooms as private grief areas.
- ☐ Assess stress level of staff. Recommend counseling to overly stressed staff.
- ☐ Follow-up with staff who received counseling.
- ☐ Designate staff person(s) to attend funeral.
- ☐ Allow for changes in normal routines or test schedules to address injury or death.

Earthquake

Earthquake- Inside Building

- ☐ Staff member implements action **“DROP-COVER AND HOLD”**.
- ☐ Avoid areas with large areas of glass or heavy suspended light fixtures.
- ☐ Implement Action **“LEAVE BUILDING”**.
- ☐ Maintain control of staff- **DO NOT RUN!!**
- ☐ Avoid touching electrical wires and metal objects such as chain link fences.
- ☐ Render first aid as required.
- ☐ Runner collects roll sheets. Hold up either **“OK”** or **“NEED HELP”** sign.
- ☐ Office Manager will initiate action **“STAY OUT”**. Do not return to buildings for any reason until they have been declared safe by authorized officials and the **“ALL CLEAR”** command is given.
- ☐ Office Manager will instruct other staff members/volunteers to guard entrances so that no one re-enters the buildings.
- ☐ Office Manager will initiate **“GO HOME”** action if warranted.

Earthquake- Outside on Center Grounds

- ☐ Staff member implements action **“DROP-COVER AND HOLD”**
- ☐ The safest place is to stay in the open. **Stay there until the earthquake is over.**
- ☐ Move away from buildings, playground equipment, utility poles, signs, trees, metal fences, exposed wires and wet areas.
- ☐ **DO NOT RUN!**
- ☐ Avoid touching electrical wires and metal objects such as chain link fences.
- ☐ Render first aid as required.

- ❑ Take roll. Hold up either “**OK**” or “**NEED HELP**” sign.
- ❑ Office Manager will initiate action “**STAY OUT**”. Do not return to buildings for any reason until they have been declared safe by authorized officials and the “**ALL CLEAR**” command is given.
- ❑ Office Manager will instruct staff members/volunteers to guard entrances so that no one re-enters the buildings.
- ❑ Office Manager will initiate “**GO HOME**” action if warranted.

Civil Disturbance, Violence, Gunman on Site

PERSONS RECEIVING GUN OR VIOLENCE INFORMATION ON CAMPUS BY TELEPHONE, EMAIL OR OTHER MESSAGE WILL IMMEDIATELY NOTIFY the Office Manager

- ☐ Notify the Office Manager immediately.
- ☐ Tell the Office Manager the name of the suspected person who brought the weapon, where the weapon is located, if the suspect has threatened anyone or any other details that may prevent the suspect from hurting someone or himself/herself.

Office Manager:

- ☐ **Initiate “LOCKDOWN”**
- ☐ If away from a building, all staff are to immediately lie flat.
- ☐ Take roll and notify the office assistant of staff missing.
- ☐ Office Manager will call **911**.
- ☐ Lock doors, stay away from windows and doors.
- ☐ **DO NOT** approach gunman. Law Enforcement will handle.
- ☐ Take roll and place **“NEED HELP/I’M OK”** sign in window.
- ☐ Release Lock Down will be issued by the Police department if involved. If the Police department was not involved it will be released by Site Administrator or Designee.

Warning and Notification of Emergency

- ☐ **Call 911**, if necessary. Assess life and safety issues first.
- ☐ Inform Office Manager
- ☐ The Office Manager notifies the Emergency Team.
- ☐ Warn team members and staff. If an emergency requires immediate action to protect the safety of students and staff activate
- ☐ _____.
 - ☐ Warning systems, i.e. announcement, sounding of bell
- ☐ Plain Language shall be used to announce an emergency.
- ☐ If immediate action is not required, notify staff at a meeting before or after program hours.
- ☐ Office Manager notifies others as needed. Families of the victim(s) should be called first.

Lock-Down Procedures

Lock-down procedures may be issued in situations involving dangerous intruders or other incidents that may result in harm to persons inside the building.

- ☐ Office Manager will issue a lock-down procedure by sending staff to each suite.
- ☐ Direct all staff and visitors into suites.
- ☐ Lock suites.
- ☐ Cover windows of suites.
- ☐ Move all persons away from windows and doors.
- ☐ Allow no one outside of suites in until Office Manager gives an all-clear signal.
- ☐ Release Lock Down will be issued by the Police department if involved. If the Police department was not involved it will be released by Site Administrator or Designee.

Sheltering Procedures

Sheltering provides refuge for students, staff and public within building during an emergency. Shelters are located in areas that maximize the safety of inhabitants. Safe areas may change depending on the emergency.

- ☐ Identify safe areas in each building.
- ☐ Office Manager warns staff to assemble in safe areas. Bring all persons inside building(s).
- ☐ Coordinators take roster.
- ☐ Close all exterior doors and windows.
- ☐ Turn off any ventilation leading outdoors.
- ☐ Cover up food not in containers or put in the refrigerator.
- ☐ If advised, cover mouth and nose with handkerchief, cloth, paper towels or tissues.
- ☐ All persons must remain in safe areas until notified by Office Manager or emergency responders.

Terrorist Event

Weapons of mass destruction likely to be employed by terrorists fall into four basic categories: Nuclear, Biological, Chemical, and Conventional. The below outlined procedures will protect students and staff should such attacks occur.

Nuclear:

Defense against nuclear weapons depends primarily on distance from the point of detonation. If time permits:

- ☐ Move staff to specifically identified basement or lower level rooms. Interior hallways as an alternative.
- ☐ Close all doors leading into hallways to minimize flying glass.
- ☐ All people assume the *duck, cover and hold* position on the ground.
- ☐ Shut down all utility systems to the building. (Gas and electricity are the priorities)
- ☐ Shelter in place to protect from fall out if attack is far enough away.
- ☐ Keep staff inside buildings.

Biological:

Defense against biological attacks is difficult. Awareness of an attack is usually not possible for days or weeks. The first signs may emerge as personnel notice a higher than usual incidence of various symptoms. Should an attack be discovered while in progress the program should:

- ☐ Reverse-evacuate all people into buildings.
- ☐ Shelter in place. (**Do not use basements or low lying areas**)
- ☐ Close all doors and windows.
- ☐ Shut down the HVAC systems. (Limit airflow from outside)
- ☐ Seal doors, windows, and vents with plastic and duct tape.
- ☐ Keep staff inside buildings.

Chemical:

- ☐ Reverse-evacuate all people into buildings.
- ☐ Shelter in place. (**Do not use basements or low lying areas**)

- ☐ Close all doors and windows.
- ☐ Shut down the HVAC systems. (Limit airflow from outside)
- ☐ Seal doors, windows, and vents with plastic and duct tape.
- ☐ Be prepared to treat staff who experience a reaction to the chemical agent.
- ☐ Evacuation. (*The decision to evacuate should only be made after consulting with public safety, emergency management, or military authorities.*)

Conventional:

The danger from the blast effect of conventional explosive devices is similar to nuclear devices with a higher rate of survivability. If responding to the threat of an imminent blast nearby:

- ☐ Move staff to specifically identified basement or lower level rooms. Interior hallways as an alternate.
- ☐ Close all doors leading into hallways to minimize flying glass.
- ☐ Shut down all utility systems to the building. (Gas and electricity are the priorities)
- ☐ Shelter in place to protect from fall out if attack is far enough away.
- ☐ Keep staff inside buildings.

If the building is the target of the event:

- Evacuate to (insert pre-designated location) _____

Appendix

Definition of Staff Roles

- Triage Team – staff members who are CPR & first aid certified and called on to respond to medical emergencies or injuries before
- Search & Rescue Team – staff members who strategically sweep the premises for unaccounted students when evacuation or sheltering orders are issued
- Hazards Team – staff members designated to shut off gas or seal off areas containing materials or persons who have become hazardous
- Administrative Assistant – staff member designated to ensure completion of incident reports and documentation of the emergency
- Runner – staff member designated to collect roll sheets that determine any students unaccounted for
- Lockdown Code Word – what word(s) are stated to declare lockdown orders and procedures : CODE RED
- Lockdown Means of Issue – method the person issuing the lockdown sequence is using to communicate to all staff (walkie-talkie, text message, PA system, bullhorn, etc.)
 - Main Office: Office Manager
 - All Other Offices including Main Office: Director

Emergency & Community Agency

Phone Numbers

Fire, Ambulance, Police

9-1-1

Local Police (Non-emergency)

559-684-4290 Tulare

559-584-1431 Kings County

760-878-0395 Inyo County

[Fresno County](#)

Local Fire Department

559-684-4308 Tulare

559-582-8261 Kings County

760-878-2258 Inyo (San Bernadino)

559-324-2200 Fresno County

[Clovis](#) - Station 3

CIS Security

559-495-3000

Child Abuse/Neglect Reporting Line - CPS Fresno county

559-735-0456 Tulare

559-582-3241 Kings County

760-872-1727 Inyo County

Reporting Child Abuse [Fresno County](#)

559-600-8320

Reporting Elder/Dependant Abuse [Fresno County](#)

559-600-3383

Crime Reporting Hotline in your county

[Tulare County](#)

[Kings County](#)

[Inyo County](#)

[Fresno County](#)

Hazardous Materials: To report a leak or spill

[Tulare County](#) 559-713-4531

[Kings County](#) 206-477-4466

[Inyo County](#) 760-873-5577

[Fresno County](#) 559-600-3271

The Emergency Response Team

[Tulare County/SoCalGas](#)

[Kings County](#)/ PGE-1-800-743-5000

[Inyo County](#)/ PGE-1-800-743-5000

[Fresno County](#) 559-324-2217

Reset Fire Alarm (Misty)

559-439-9200

Building Keys (Misty)

559-439-9200

[Poison Control Center](#)

1 (800) 222-1222

Disaster Assistance

[Tulare](#) 559-636-5055

[Kings County](#) 559-852-2847

Sheriff's Dispatch 559-852-2720

[Inyo County](#) 760-873-8557

[Fresno County](#) 559-600-3111

American Red Cross

1-800-RED CROSS (1-800-733-2767)

Terrorist Threat

1-877-A-THREAT

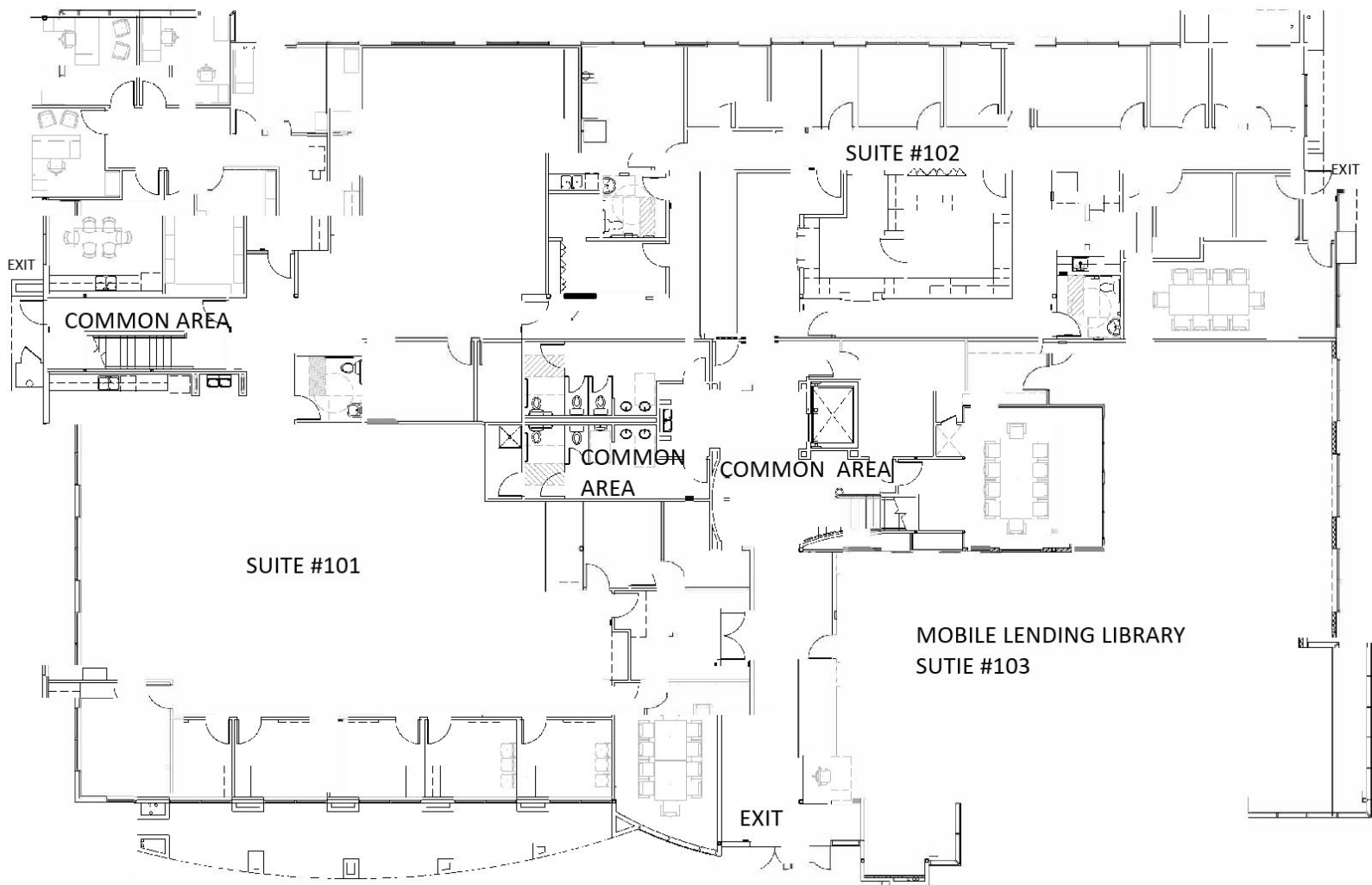
General City Telephone Information

[Tulare County](#) 559-685-2300

[Kings County](#)

[Inyo County](#)

[Fresno County](#) 559-621-2489



OK

NEED

HELP

Incident Report

Reported by: _____

Date of Incident: _____

Persons Involved: _____

Describe incident and actions taken: _____

Incident Report

Reported by: _____

Date of Incident: _____

Persons Involved: _____

Describe incident and actions taken: _____

[illegible]

Incident Report

Reported by: _____

Date of Incident: _____

Persons Involved: _____

Describe incident and actions taken: _____

[illegible]

Incident Report

Reported by: _____

Date of Incident: _____

Persons Involved: _____

Describe incident and actions taken: _____

Incident Report

Reported by: _____

Date of Incident: _____

Persons Involved: _____

Describe incident and actions taken: _____

