

EXCEL ACADEMY CHARTER SCHOOLS
Regular Meeting of the Board of Directors

Agenda

Thursday, January 14, 2021
Regular Meeting Begins at 9:30 a.m.



1185 Calle Dulce, Chula Vista, CA 91910
39251 Camino Las Hoyas, Indio, CA 92203
16222 Quail Rock Road, Ramona, CA 92065
1160 Cuyamaca Avenue, Chula Vista, CA 91911
1545 Apache Drive, Chula Vista, CA 91910

Excel Academy Charter Schools
1 Technology Drive, Bldg. I, Suite 811, Irvine, CA 92618

Zoom Meeting Information

Dial In: 1-669-900-9128

Meeting ID: 990 7777 8323

Join URL: <https://zoom.us/j/99077778323>

MISSION STATEMENT

Excel Academy will provide flexible, personalized learning through a customized course of study that will educate, motivate, and instill a love of learning in each individual student. Teachers and parents will join together to maintain high expectations and promote academic excellence for all students creating the next generation of leaders.

THE ORDER OF BUSINESS MAY BE CHANGED WITHOUT NOTICE

Notice is hereby given that the order of consideration of matters on this agenda may be changed without prior notice.

REASONABLE LIMITATIONS MAY BE PLACED ON PUBLIC TESTIMONY

The Governing Board's presiding officer reserves the right to impose reasonable time limits on public testimony to ensure that the agenda is completed.

REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY

Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting of the Governing Board may request assistance by contacting Excel Academy Charter Schools at 760-494-9646.

1. CALL TO ORDER AND ROLL CALL

Time _____ a.m.

1.1. Roll Call

William Hall	President
Michael Humphrey	Vice President
Steve Fraire	Clerk
Susan Houle	Member
Larry Alvarado	Member

2. APPROVE/ADOPT AGENDA

It is recommended the Board of Directors adopt as presented, the agenda for the Regular Board meeting of January 14, 2021.

Roll Call Vote:

William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

3. PUBLIC COMMENT - CLOSED SESSION

The public has a right to comment on any items of the closed session agenda. Members of the public will be permitted to comment on any other item within the Board's jurisdiction under section 8.0 Public Comments at Board Meetings.

4. ADJOURN TO CLOSED SESSION

Time: _____

The Board will consider and may act on any of the Closed Session matters listed in Agenda Item 5.0.

5. CLOSED SESSION

Conference with Legal Counsel regarding Potential Litigation: 3 matters

There is significant exposure to litigation against the Agency pursuant to Government Code Section 54956.9(d)(2)

Public Employee Performance Evaluation Pursuant to Government Code 54957

a. CEO Evaluation

6. RECONVENE REGULAR MEETING

Time: _____

7. PLEDGE OF ALLEGIANCE

Led by: _____

8. PUBLIC COMMENTS/RECOGNITION/REPORTS

Please submit a Request to Speak to the Board of Directors using the chat feature on the right hand side of the Zoom platform. Please state the agenda item number that you wish to address prior to the agenda item being called by the Board President. Not more than three (3) minutes are to be allotted to any one (1) speaker, and no more than twenty (20) minutes on the same subject. This portion of the agenda is for comments, recognitions and reports to the Board and is not intended to be a question and answer period. If you have questions for the Board, please provide the Board President with a written statement and an administrator will provide answers at a later date.

9. CORRESPONDENCE/PROPOSALS/REPORTS

- 9.1. School Highlights - Presented by Heidi Gasca, Executive Director
- 9.2. DMS Monthly Update (DMU) - November 2020, Presented by Karl Yoder
- 9.3. DMS Mid-Year Check-in Evaluation - December 2020
- 9.4. Charter Services Organization Mid-Year Update, Presented by Dr. David Franklin
- 9.5. CEO SMART Goals Mid-Year Update

10. CONSENT CALENDAR

Items listed under Consent Calendar are considered routine and will be approved/adopted by a single motion. There will be no separate discussion of these items; however, any item may be removed from the Consent Calendar upon the request of any member of the Board, discussed, and acted upon separately.

Consent Calendar - Board Meeting Minutes

- 10.1. Minutes of the Regular Board Meeting that was held on December 3, 2020
- 10.2. Minutes of the Special Board Meeting that was held on December 18, 2020

Consent Calendar - Business/Financial Services

- 10.3. Check Register - December 2020

Consent Calendar - Education/Student Services

- 10.4. Approval of 2019-20 School Accountability Report Card (SARC) Questionnaire

Consent Calendar - Personnel Services

- 10.5. Approval of Employee Handbook Revisions, effective January 1, 2021
- 10.6. Approval of IRS Mileage Reimbursement Rate Change

Consent Calendar - Policy Development

10.7. Approval of existing board policies reviewed and revised by staff for the 2020-2021 school year.

Board Policies: Revised

4115-EA Family and Medical Leave Act Policy

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

11. PERSONNEL SERVICES

11.1. (Action) Approval of Declaration of Need for Emergency CLAD

It is recommended the Board approve the Declaration of Need for Emergency CLAD for ExcelAcademy Charter Schools, Helendale (#2073) and Warner (#2053).

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

11.2. (Action) Approval of Revision to Employee Lease Agreement - Attachment A (Job Description - Chief Executive Officer)

It is recommended the Board approve the revisions to the job description for Chief Executive Officer included as Attachment A in the Employee Lease Agreement.

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

12. POLICY DEVELOPMENT

12.1. (Action) Approval of New Board Policies

It is recommended the Board approve the proposed policies. These policies will replace the current policies and will allow the Board to address any related complaints or issues that may be raised in the school/work environment.

1000 Series - Community Relations

1035-EA Access to Public Records Policy

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

13. CALENDAR

The next scheduled meeting will be held virtually on February 11, 2021.

14. BOARD COMMENTS

15. CEO COMMENTS

16. ADJOURNMENT

The Regular meeting of the Board of Directors adjourned at _____ a.m.

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

FOR MORE INFORMATION

For more information concerning this agenda,
please contact Excel Academy Charter School.

Telephone: 760-494-9646



**Excel Academy
December Board
Update**

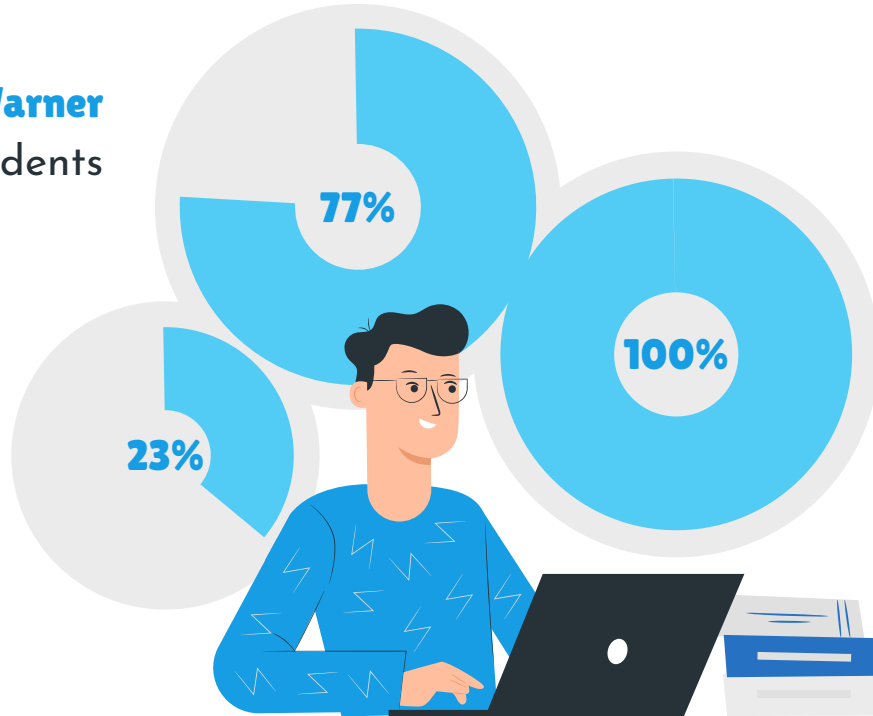
school highlights



Enrollment Numbers

ExcelCS – Warner
1171 Students

**ExcelEast –
Helendale**
502 Students



Total:
1673 Students

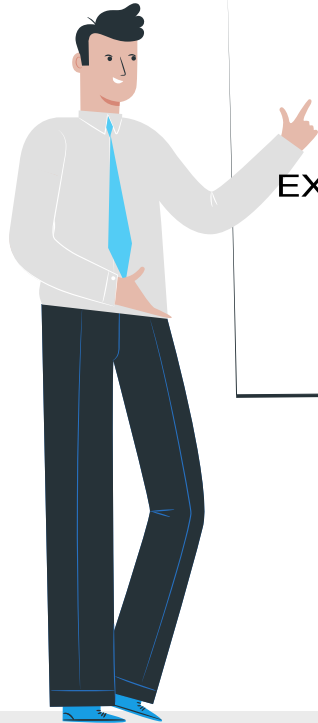
Waitlist

Currently, we have 650 students on the waitlist for ExcelCS (Warner)
215 students on the waitlist for ExcelEast (Helendale).

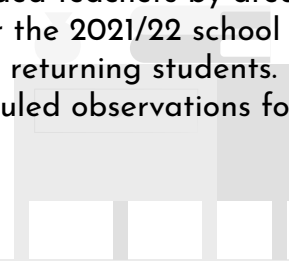


**865 Total Waitlisted
Students**

Education Department Update



- Curriculum planning for next year: Held meetings with Savvas and HMH to review products for the ETL (Excel Teacher Led) virtual courses.
- Edited and revised the teacher performance evaluation form for the regional leaders and administrators to use in the spring semester.
- Helped plan meetings between the high school and TK-8th grade programs in order to streamline our programs for next year.
- Created a plan for next year based on the 1505 student count.
 - Looked at how many teachers we would need in general, and will update needed teachers by area once we open registration for the 2021/22 school year in March and collect data on returning students.
- Teacher Training Coordinator scheduled observations for the Middle School ETL teachers.



December Highlights

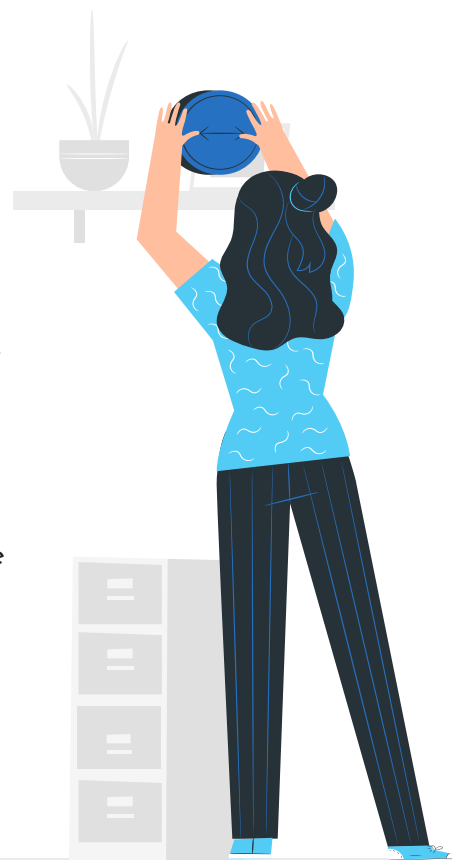
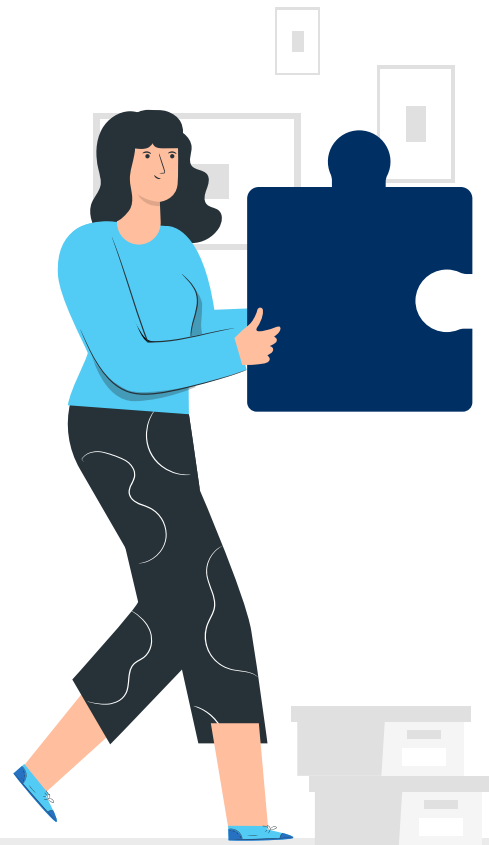
Executive Director continues to work collaboratively with team members at CliftonLarsonAllen (CLA) audit firm to wrap up a successful financial audit.

Executive Director, in collaboration with DMS, presented the First Interim Budget and Board Overview for Parents (BOP) to the board and authorizing districts.

Executive Director welcomed and had a successful onboarding meeting with our new board member; Mr. Larry Alvarado. We are thrilled to have his expertise in education, specifically in the area of special education.

Executive Director certified PI reports and sent to authorizing districts for signature.

Executive Director, in collaboration with DMS, turned in the CARES certification forms to the authorizing county offices.



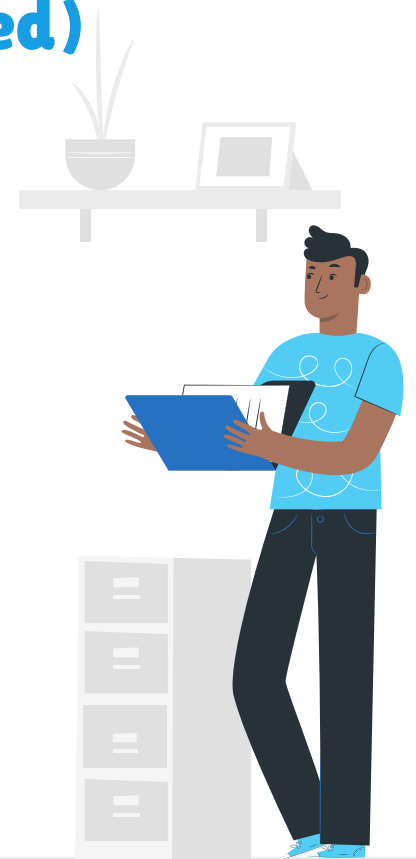
December Highlights (continued)

The Student Council created a "[Holidays Around the World](#)" video to give a look inside holiday traditions around the globe, as a gift to Excel Academy for the holidays.

Excel Academy has been working on an "Understanding Cultural Differences" presentation to present to the staff for our upcoming professional development.

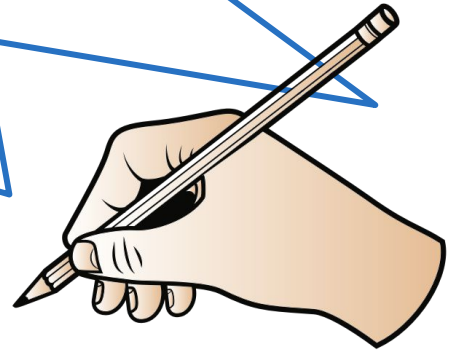
Executive Director chose Sage Intacct as the accounting software as we bring our finance department internal.

Together with the Assistant Director of Operations and HR, we have designed an Implementation plan and timeline to meet goals for a successful July 1 implementation.



Five amazing Excel Academy students are some of Region 4's winners in the "Imagine This..." writing contest! State winners will be announced on January 1st. We wish them all the best!

Region 4 winners!



December Holiday Cabinet



Intervention Department Update

01



Compliance

Assisted teacher and parents with: *Read Live, MobyMax, i-Ready lessons, Imagine Language & Literacy, ESL Reading Smart, BrainPop.*

02



Training

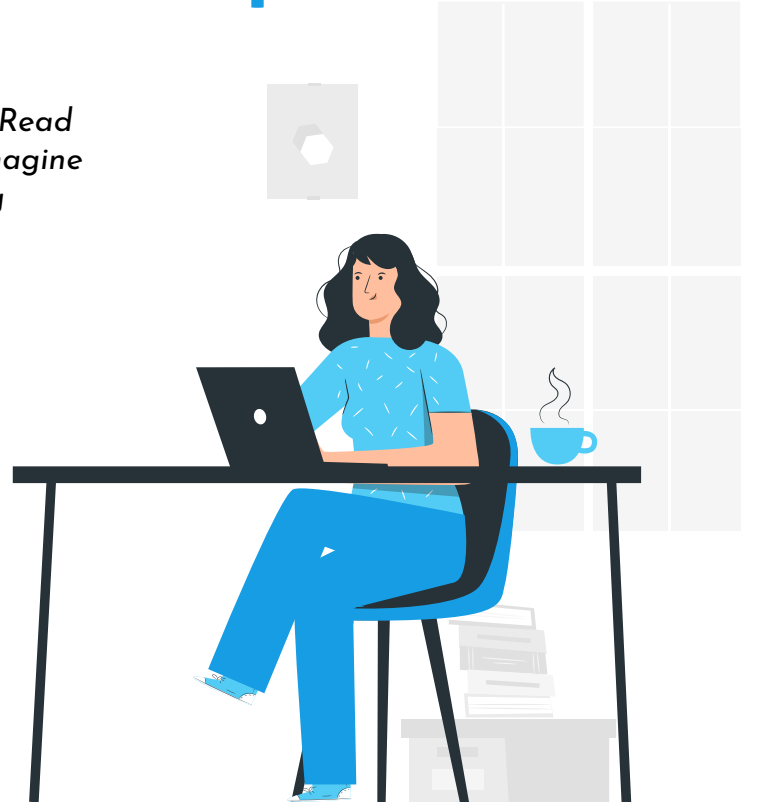
Planning and creating *Parent Student Workshops*, a brand new intervention program.

03



Support

Collaborated on support for mental health concerns and crises.



Assessment Department Update

Compliance

Completed Fall 1 Certification for Warner and Helendale.



Collaboration

Participated in the SPED State Testing Accommodations Internal Check-in.

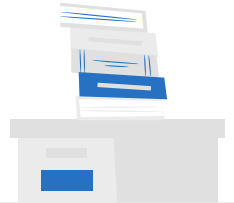
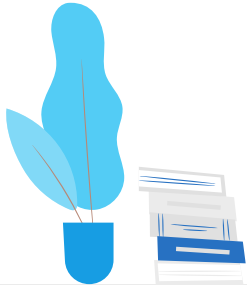
Training

Worked with three teachers as part of their adjunct duty to implement the CAASPP test prep program that will begin in January and conclude in March.



Goals

Completed and submitted the SARC for both Warner and Helendale.



High School Department Update



Student Council

Student Council created "Holidays Around the World" video.



Office Hours

Met with HR to verify ETL teacher payments and confirm evaluation protocol.



Professional Development

Attended AB 1505 Verified Data Technical Assistance Webinar.



Updates

Oversight of low-performing online student grades to ensure teacher and student support.



Collaboration

Met with Savvas curriculum representatives to review as a possible new high school wide curriculum.



Webinars

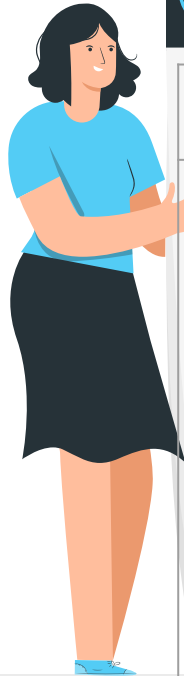
Led monthly HS webinar series "Teaching Tips for Math."

Human Resources Department Update

1. Performance evaluation guidelines sent to all departments and admin.
2. Job descriptions finalized for internal finance department.



Community Department Update



P

1.

Excel Eagles Pro Team has made it to the playoffs in the CoderZ League cyber robotics coding program.

2.

Five students have placed as regional winners for the *Imagine this...* writing contest with the California Foundation for Agriculture in the Classroom. All students are in the running to win at the state level.

3.

Twelve students will compete at the school level spelling bee through Scripps' online platform.

4.

The last ToR-Led Zoom week for 2020 included 10 workshops on topics ranging from baking, writing, history, math, and crafts.

Professional Development

Intervention



Department

Attended Professional Development: "Effective Distance Practices" and "Resources to Maximize EL Student & Parent Access."

High School



Department

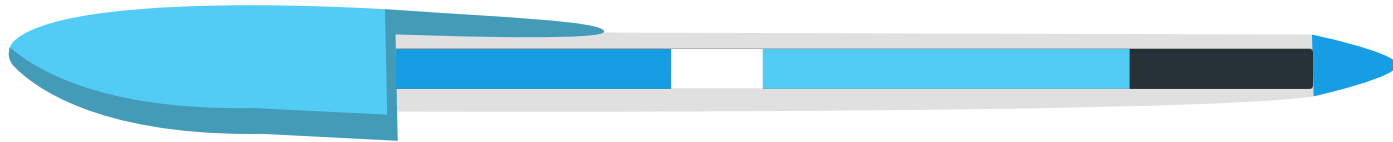
Attended "Addressing Isolation: Meaningful Peer Collaboration" webinar as well as the "AB 105 Verified Data Technical Assistance" webinar.

Counseling



Department

Attended "Understanding Contemporary Anti-Semitism: An Introduction For California Educators"



Future Projects & Activities

Meeting with Stampli, a company that will work in conjunction with Excel's accounting software.

Mini Admin Retreat

January

January 26



January 6

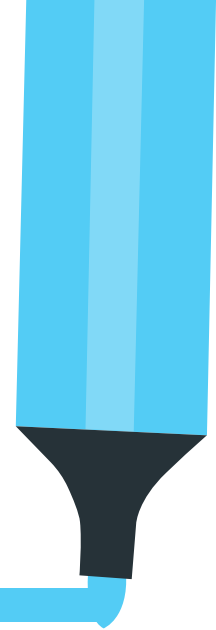
All Staff PD 5.0

February

Assistant Director of Assessment is preparing for the remote administration of the ELPAC and CAASPP this spring.

February 25

Virtual Helendale Visit





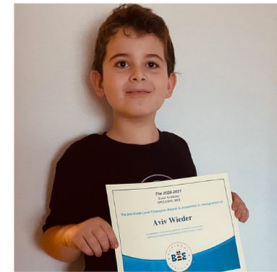
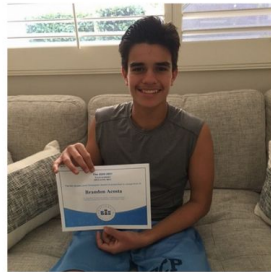
Congratulations to all our grade level spelling bee winners! We wish you the best for the school bee.

MEET A FEW OF OUR AMAZING GRADE LEVEL WINNERS

Student Spotlights



1st - 3rd Grade
Raelene Afraz
Wesley Waples
Syeda Ruqayyah Farooq
Aviv Wieder
Ares Gamez
Jamie Lee



4th-8th Grade
Owen Erpelding
Qian Yang
Jolene Chan
Allyson Huang
Brandon Acosta
Hannah Hosman





Thank you!

Dear Excel Academy,

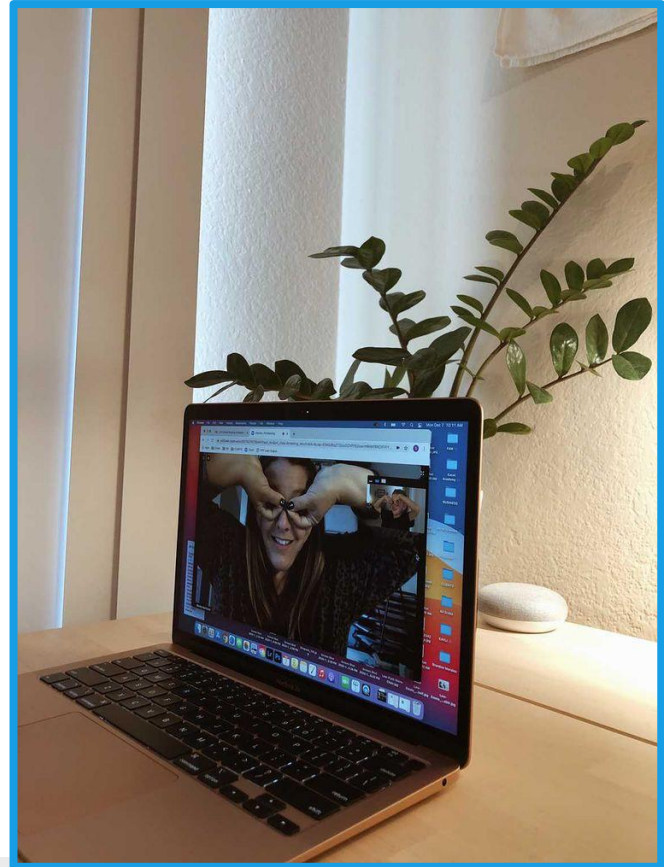
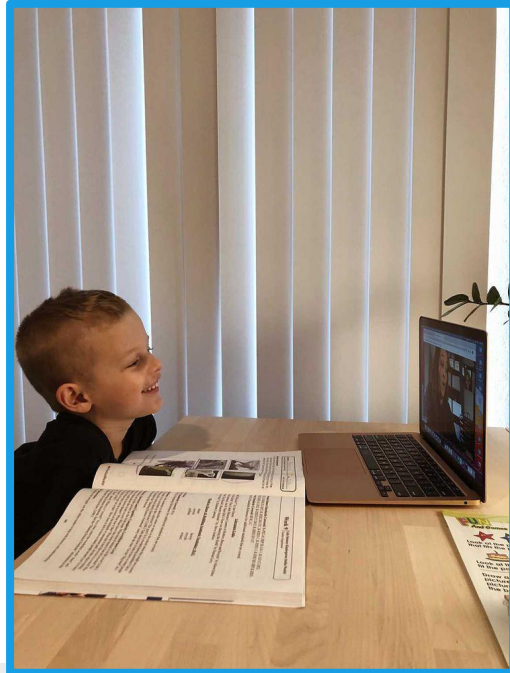
I wanted to take this opportunity to thank everyone that selected and supported me for the Carson Scholars Fund nomination. I've been homeschooled since kindergarten, and it is a choice that I can never be grateful enough. Everyone I have met has been so loving and kind at Excel Academy. I truly thank you for everything that you do. Every student and parent appreciates you, including myself and my family. I do not credit my success to my own efforts, because my current achievements have been accomplished with loving teachers, kind advisors, supportive mentors, and more. Everything is a collective effort, and I thank Excel Academy for being there for me. Whether or not I earn a scholarship is not definite, but what is definite is that I will try my best and not let Excel Academy down as their representative. Again, thank you, thank you, thank you. You are all amazing, and I wish you a wonderful holiday season!



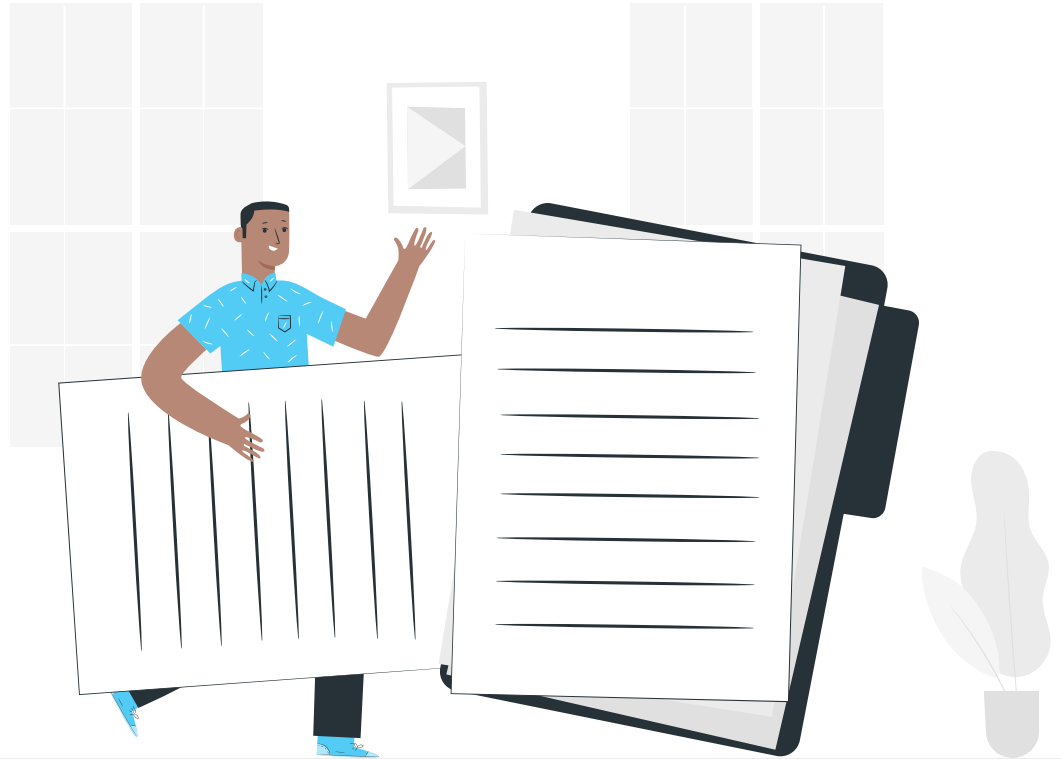
WITH LOVE, JESSIE SAN



Virtual LP Meetings & Zoom Classes



THANKS!



This report is the first DMS Monthly Update since the Board-approved First Interim Budget, and compares that First Interim with actuals through the most recent closed month. Along with an update on the financial health of the organization, these updates are a means for DMS and Excel management to review and detect coding and budgeting issues and to make corrections throughout the year. Reviewing and collaborating monthly to thoughtfully address these issues, especially early in the year, is the key to successfully managing Excel's finances.

Each Excel school is doing well, and they are both projected to generate operating surpluses for 2020-21. Each school and Excel as a whole remain projected to remain fiscally stable and solvent for the foreseeable future, closely on track with the First Interim projections.

Revenues for both schools generally appear to be on track for this time of year. Note that the new federal stimulus received in December may provide the Excel schools with significant additional revenue in either 2020-21 or 2021-22 - we will keep the Board apprised as we learn more specifics about this.

Expenses for both schools are also on track for this time of year. We have ensured that all expenditure and reporting timelines for federal stimulus money have been met to date.

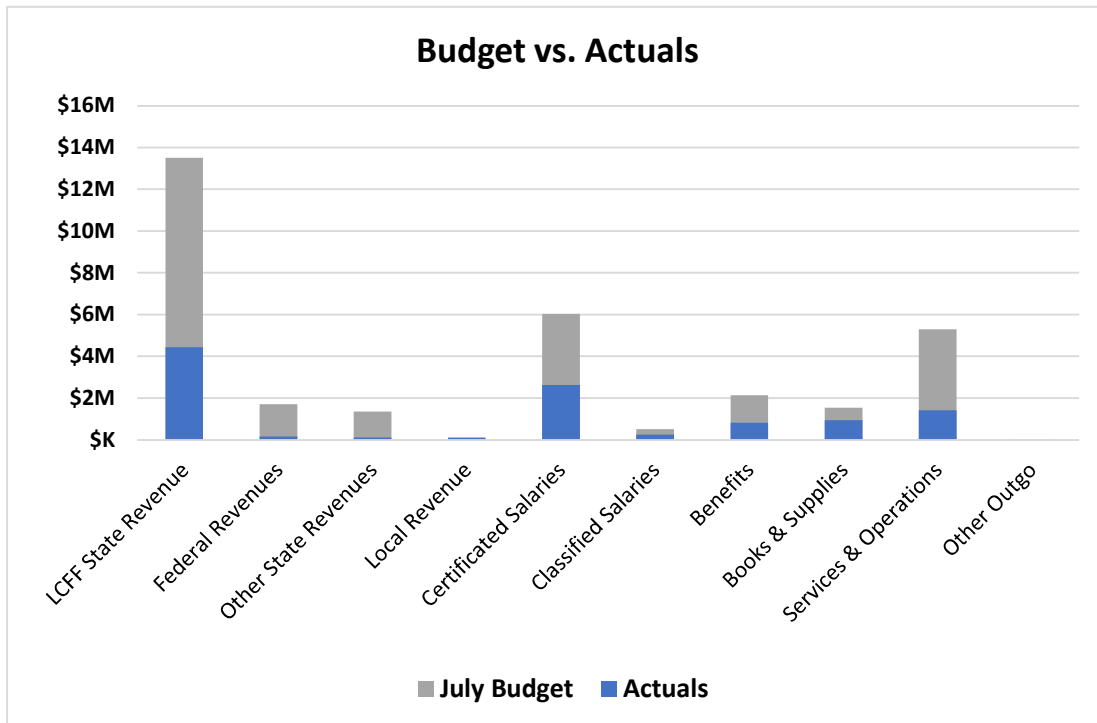
The next round of official budget revisions will come during the Second Interim Budget process (due for approval in early March), and will incorporate any adjustments from First Interim.

Excel continues to demonstrate fiscal stability and is projected to meet all obligations as scheduled. We look forward to working together to monitor staffing, enrollment, and attendance levels and making budget adjustments as needed, in collaboration with our DMS team.

EXCEL ACADEMY CHARTER SCHOOLS (Combined)
2020-21 DMS Monthly Update
Budget vs Actuals Summary

Budget vs Actuals	Current Budget	Actuals 11/30/2020	% of Budget
ADA			
Revenues			
LCFF State Revenue	13,509,159	4,432,987	32.81%
Federal Revenues	1,708,895	155,911	9.12%
Other State Revenues	1,357,696	104,288	7.68%
Local Revenue	103,000	87,590	85.04%
Total Revenues	16,678,750	4,780,776	28.66%
Expenditures			
Certificated Salaries	6,022,823	2,624,425	43.57%
Classified Salaries	505,207	244,863	48.47%
Benefits	2,128,848	813,939	38.23%
Books & Supplies	1,532,117	939,298	61.31%
Services & Operations	5,286,703	1,409,676	26.66%
Other Outgo	-	340	0.00%
Total Expenditures	15,475,699	6,032,540	38.98%
Operating Income/(Loss)	1,203,051	(1,251,764)	42%

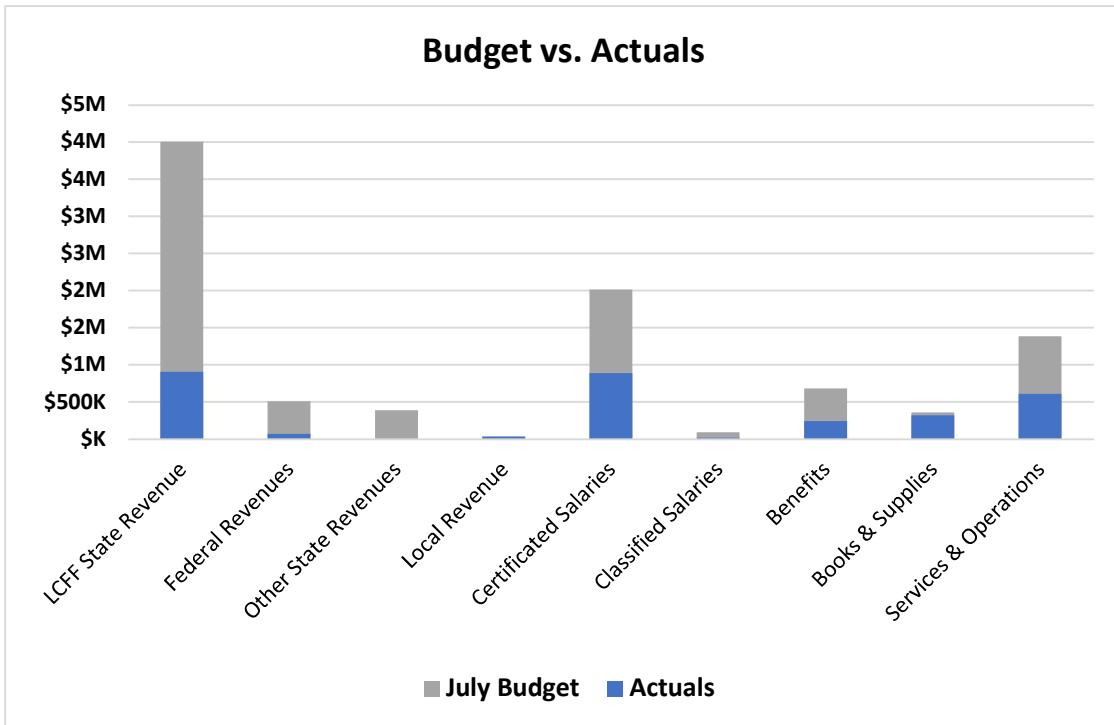
YTD passed



EXCEL ACADEMY CHARTER - EAST
2020-21 DMS Monthly Update
Budget vs Actuals Summary

Budget vs Actuals		Current Budget	Actuals 11/30/2020	% of Budget
ADA				
Revenues				
LCFF State Revenue		4,005,601	906,089	22.62%
Federal Revenues		510,103	71,421	14.00%
Other State Revenues		387,803	-	0.00%
Local Revenue		25,500	34,507	135.32%
Total Revenues		4,929,007	1,012,018	20.53%
Expenditures				
Certificated Salaries		2,015,486	889,934	44.15%
Classified Salaries		89,748	16,266	18.12%
Benefits		681,958	239,758	35.16%
Books & Supplies		359,201	320,569	89.25%
Services & Operations		1,383,424	608,451	43.98%
Total Expenditures		4,529,818	2,074,978	45.81%
Operating Income/(Loss)		399,189	(1,062,960)	42%

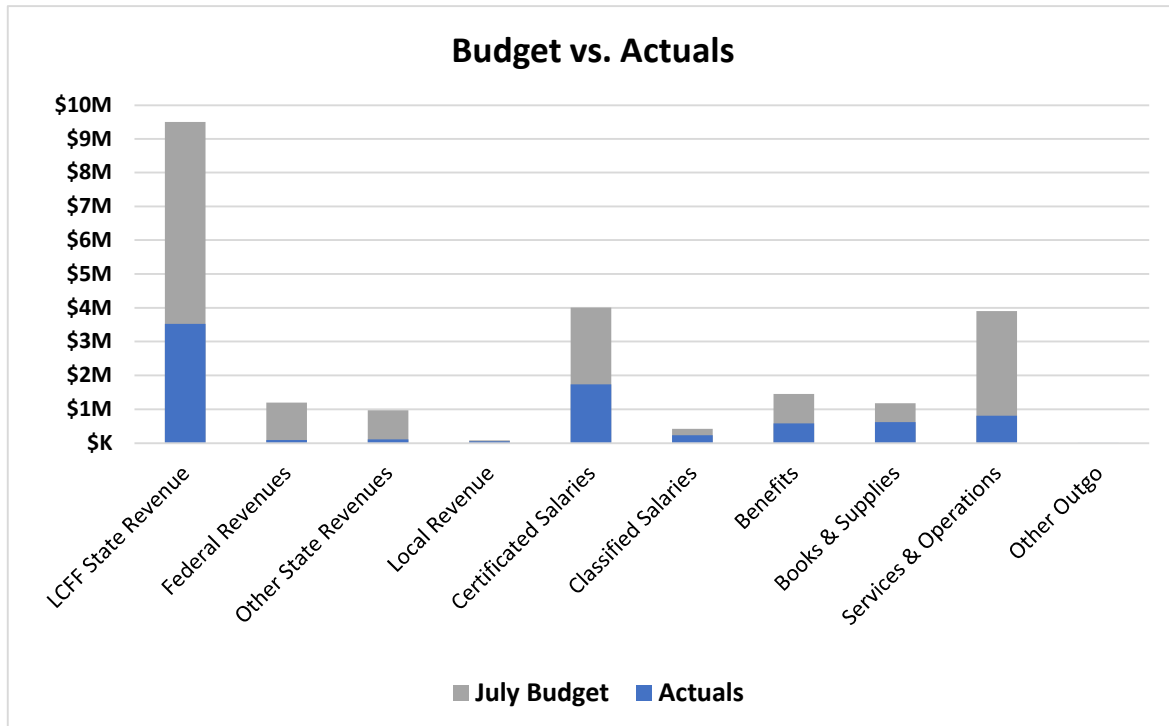
YTD passed
42%



EXCEL ACADEMY CHARTER - WARNER
2020-21 DMS Monthly Update
Budget vs Actuals Summary

Budget vs Actuals	Current Budget	Actuals 11/30/2020	% of Budget
ADA			
Revenues			
LCFF State Revenue	9,503,558	3,526,897	37.11%
Federal Revenues	1,198,792	84,490	7.05%
Other State Revenues	969,893	104,288	10.75%
Local Revenue	77,500	53,083	68.49%
Total Revenues	11,749,743	3,768,758	32.08%
Expenditures			
Certificated Salaries	4,007,337	1,734,491	43.28%
Classified Salaries	415,459	228,596	55.02%
Benefits	1,446,890	574,181	39.68%
Books & Supplies	1,172,916	618,729	52.75%
Services & Operations	3,903,278	801,225	20.53%
Other Outgo	-	340	0.00%
Total Expenditures	10,945,880	3,957,562	36.16%
Operating Income/(Loss)	803,863	(188,804)	42%

YTD passed



EXCEL ACADEMY CHARTER - COMBINED
2020-21 DMS Monthly Update
Budget vs Actuals Detail

Budget vs Actuals	Object	Description	Current Budget	Actuals 11/30/2020	% of Budget	Comments/Notes
Revenue						
LCFF Revenue						
	8011	LCFF General Entitlement	12,419,069	4,056,916	32.67%	
	8012	EPA Entitlement	300,990	75,248	25.00%	
	8019	Prior Year Unrestricted Revenue	-	4,533	0.00%	
	8096	In-Lieu-Of Property Taxes	789,100	296,290	37.55%	
		Total LCFF Revenue	13,509,159	4,432,987	32.81%	
Federal Revenue						
	8181	Federal IDEA SpEd Revenue	182,460	-	0.00%	
	8182	SpEd - Discretionary Grants	-	-	0.00%	
	8290	Other Federal Revenue	1,526,435	155,196	10.17%	
	8295	PY Federal - Restricted Revenue	-	715	0.00%	
		Total Federal Revenue	1,708,895	155,911	9.12%	
Other State Revenue						
	8311	AB602 State SpEd Revenue	865,346	-	0.00%	
	8550	Mandated Cost Reimbursements	32,721	23,295	71.19%	
	8560	State Lottery Revenue	312,629	-	0.00%	
	8590	Other State Revenue	147,000	80,993	55.10%	
		Total Other State Revenue	1,357,696	104,288	7.68%	
Local Revenue						
	8660	Interest Income	52,500	7,632	14.54%	
	8698	Other Revenue (Suspense)	-	68,901	0.00%	
	8699	Other Revenue	50,500	11,057	21.90%	
		Total Local Revenue	103,000	87,590	85.04%	
Total Revenue			16,678,750	4,780,776	28.66%	

EXCEL ACADEMY CHARTER - COMBINED
2020-21 DMS Monthly Update
Budget vs Actuals Detail

Budget vs Actuals	Object	Description	Current Budget	Actuals 11/30/2020	% of Budget	Comments/Notes
Expenditures						
Certificated Compensation						
	1100	Teacher Compensation	4,298,036	2,022,282	47.05%	
	1150	Teacher Stipends/Extra Duty	270,544	-	0.00%	
	1170	Health Care In Lieu	-	18,618	0.00%	
	1200	Student Support	94,909	22,885	24.11%	
	1250	Student Support Stipends	3,200	-	0.00%	
	1300	Certificated Administrators	1,308,775	556,481	42.52%	
	1350	Administrator Stipends/Extra Duty	47,360	-	0.00%	
	1370	Administrators Health Care In Lieu	-	4,159	0.00%	
		Total Certificated Compensation	6,022,823	2,624,425	43.57%	
Classified Compensation						
	2400	Clerical & Technical Staff	502,207	243,363	48.46%	
	2450	Clerical & Technical Stipends	3,000	-	0.00%	
	2470	Clerical & Technical Health Care In Lieu	-	1,500	0.00%	
		Total Classified Compensation	505,207	244,863	48.47%	
Employee Benefits						
	3101	STRS Certificated	972,185	409,133	42.08%	
	3301	OASDI/Medicare	87,523	38,245	43.70%	
	3302	OASDI-Medicare Class	38,648	18,295	47.34%	
	3401	Health Care Certificated	767,904	243,038	31.65%	
	3402	Health Care Classified	117,600	44,499	37.84%	
	3501	Unemployment Insurance Certificated	18,069	25,407	140.62%	
	3502	State Unemp Ins - Class	1,516	4,116	271.57%	
	3601	Workers' Comp Certificated	72,274	23,065	31.91%	
	3602	Workers' Comp Classified	6,062	5,954	98.20%	
	3901	Other Benefits Cert	4,197	755	18.00%	
	3902	Other Benefits Class	42,870	1,432	3.34%	
		Total Employee Benefits	2,128,848	813,939	38.23%	

EXCEL ACADEMY CHARTER - COMBINED
2020-21 DMS Monthly Update
Budget vs Actuals Detail

Budget vs Actuals	Object	Description	Current Budget	Actuals 11/30/2020	% of Budget	Comments/Notes
Books, Materials, & Supplies						
	4100	Textbooks & Core Curriculum	1,200,000	738,946	61.58%	
	4200	Other Reference Materials	-	-	0.00%	
	4205	Books and Other Reference Materials - Student Field Trips	-	4,278	0.00%	
	4310	Materials & Supplies	200,000	108,252	54.13%	
	4320	Office Supplies	12,100	9,564	79.04%	
	4330	Meals & Events	15,735	266	1.69%	
	4350	SPED Materials & Supplies	63,000	4,896	7.77%	
	4390	Other Supplies	31,283	175	0.56%	
	4400	Non-Capitalized Equipment	10,000	72,921	729.20%	
Total Books, Materials, & Supplies			1,532,117	939,298	61.31%	
Services & Other Operating Costs						
	5100	SpEd Consultants and Vendors Subagreements for Service	575,000	115,112	20.02%	
	5200	Travel & Conferences	51,006	2,191	4.29%	
	5210	Mileage Reimbursements	10,000	842	8.42%	
	5300	Dues & Memberships	25,573	9,154	35.80%	
	5400	Insurance	162,431	72,921	44.89%	
	5500	Operations & Housekeeping	-	-	0.00%	
	5610	Facility Rents & Leases	80,672	36,251	44.94%	
	5620	Equipment Leases	2,000	234	11.68%	
	5630	Maintenance & Repair	-	35	0.00%	
	5800	Professional Services - Non-instructional	152,127	90,477	59.47%	
	5810	Legal	320,000	35,206	11.00%	
	5825	DMS Business Services	392,023	209,490	53.44%	
	5830	Non-Instructional Software Licenses/Fees	-	2,198	0.00%	
	5835	Field Trips	4,105	1,053	25.64%	
	5840	Advertising & Recruitment	27,330	3,698	13.53%	
	5841	Community Marketing	41,737	13,493	32.33%	

EXCEL ACADEMY CHARTER - COMBINED
2020-21 DMS Monthly Update
Budget vs Actuals Detail

Budget vs Actuals	Object	Description	Current Budget	Actuals 11/30/2020	% of Budget	Comments/Notes
	5850	Oversight Fees	215,204	-	0.00%	
	5855	Short-Term Interest	89,250	3,828	4.29%	
	5860	Service Fees	32,241	630	1.96%	
	5865	Collaborative Fee	871,076	492,167	56.50%	
	5870	Livescan Fingerprinting	-	50	0.00%	
	5878	Student Assessment	30,780	30,000	97.47%	
	5880	Instructional Vendors & Consultants	2,100,000	278,727	13.27%	
	5890	Misc Other Outside Services	2,500	-	0.00%	
	5895	Professional Development	-	54	0.00%	
	5910	Telephone	18,000	7,425	41.25%	
	5920	Internet	-	180	0.00%	
	5930	Postage	8,650	4,262	49.27%	
	5940	Technology	75,000	-	0.00%	
	Total Services & Other Operating Costs		5,286,703	1,409,676	26.66%	
	Capital Expenditures					
	Total Capital Expenditures		-	-	0.00%	
	Other Outgo					
	Total Other Outgo		-	340	0.00%	
Total Expenditures			15,475,699	6,032,540	38.98%	
Operating Income/(Loss)			1,203,051	(1,251,764)	YTD passed 42%	

EXCEL ACADEMY CHARTER - EAST
2020-21 DMS Monthly Update
Budget vs Actuals Detail

Budget vs Actuals	Object	Description	July Budget	Actuals 11/30/2020	% of Budget	Comments/Notes
Revenue						
LCFF Revenue						
	8011	LCFF General Entitlement	3,843,846	884,084	23.00%	
	8012	EPA Entitlement	87,734	21,934	25.00%	
	8019	Prior Year Unrestricted Revenue	-	71	0.00%	
	8096	In-Lieu-Of Property Taxes	74,021	-	0.00%	
Total LCFF Revenue			4,005,601	906,089	22.62%	
Federal Revenue						
	8181	Federal IDEA SpEd Revenue	53,184	-	0.00%	
	8182	SpEd - Discretionary Grants	-	-	0.00%	
	8290	Other Federal Revenue	456,919	70,706	15.47%	
	8295	PY Federal - Restricted Revenue	-	715	0.00%	
Total Federal Revenue			510,103	71,421	14.00%	
Other State Revenue						
	8311	AB602 State SpEd Revenue	252,235	-	0.00%	
	8550	Mandated Cost Reimbursements	9,426	-	0.00%	
	8560	State Lottery Revenue	91,142	-	0.00%	
	8590	Other State Revenue	35,000	-	0.00%	
Total Other State Revenue			387,803	-	0.00%	
Local Revenue						
	8698	Other Revenue (Suspense)	-	33,621	0.00%	
	8699	Other Revenue	25,500	886	3.48%	
Total Local Revenue			25,500	34,507	135.32%	
Total Revenue			4,929,007	1,012,018	20.53%	

EXCEL ACADEMY CHARTER - EAST
2020-21 DMS Monthly Update
Budget vs Actuals Detail

Budget vs Actuals	Object	Description	July Budget	Actuals 11/30/2020	% of Budget	Comments/Notes
Expenditures						
Certificated Compensation						
	1100	Teacher Compensation	1,357,813	720,125	53.04%	
	1150	Teacher Stipends/Extra Duty	104,015	-	0.00%	
	1170	Health Care In Lieu	-	7,291	0.00%	
	1200	Student Support	29,422	-	0.00%	
	1250	Student Support Stipends	992	-	0.00%	
	1300	Certificated Administrators	493,304	161,317	32.70%	
	1350	Administrator Stipends/Extra Duty	29,940	-	0.00%	
	1370	Administrators Health Care In Lieu	-	1,200	0.00%	
		Total Certificated Compensation	2,015,486	889,934	44.15%	
Classified Compensation						
	2400	Clerical & Technical Staff	89,028	16,266	18.27%	
	2450	Clerical & Technical Stipends	720	-	0.00%	
		Total Classified Compensation	89,748	16,266	18.12%	
Employee Benefits						
	3101	STRS Certificated	325,351	139,562	42.90%	
	3301	OASDI/Medicare	29,282	12,711	43.41%	
	3302	OASDI-Medicare Class	6,866	1,218	17.74%	
	3401	Health Care Certificated	257,496	72,945	28.33%	
	3402	Health Care Classified	25,920	5,059	19.52%	
	3501	Unemployment Insurance Certificated	6,046	2,560	42.33%	
	3502	State Unemp Ins - Class	269	343	127.39%	
	3601	Workers' Comp Certificated	24,186	3,426	14.17%	
	3602	Workers' Comp Classified	1,077	1,779	165.14%	
	3901	Other Benefits Cert	910	123	13.55%	
	3902	Other Benefits Class	4,555	32	0.70%	
		Total Employee Benefits	681,958	239,758	35.16%	

EXCEL ACADEMY CHARTER - EAST
2020-21 DMS Monthly Update
Budget vs Actuals Detail

Budget vs Actuals	Object	Description	July Budget	Actuals 11/30/2020	% of Budget	Comments/Notes
Books, Materials, & Supplies						
	4100	Textbooks & Core Curriculum	240,000	258,168	107.57%	
	4200	Other Reference Materials	-	-	0.00%	
	4205	Books and Other Reference Materials - Student Field Trips	-	1,196	0.00%	
	4310	Materials & Supplies	59,999	37,613	62.69%	
	4320	Office Supplies	3,630	3,194	87.99%	
	4330	Meals & Events	4,720	-	0.00%	
	4350	SPED Materials & Supplies	38,153	1,133	2.97%	
	4390	Other Supplies	9,699	-	0.00%	
	4400	Non-Capitalized Equipment	3,000	19,266	642.19%	
Total Books, Materials, & Supplies			359,201	320,569	89.25%	
Services & Other Operating Costs						
	5100	SpEd Consultants and Vendors Subagreements for Service	163,377	34,793	21.30%	
	5200	Travel & Conferences	15,302	-	0.00%	
	5210	Mileage Reimbursements	3,000	292	9.74%	
	5300	Dues & Memberships	7,577	2,887	38.10%	
	5400	Insurance	48,729	1,755	3.60%	
	5500	Operations & Housekeeping	-	-	0.00%	
	5610	Facility Rents & Leases	24,202	5,478	22.63%	
	5620	Equipment Leases	600	-	0.00%	
	5630	Maintenance & Repair	-	-	0.00%	
	5800	Professional Services - Non-instructional	52,078	29,919	57.45%	
	5810	Legal	96,000	25,722	26.79%	
	5825	DMS Business Services	95,406	73,917	77.48%	
	5835	Field Trips	1,232	-	0.00%	
	5840	Advertising & Recruitment	8,199	665	8.10%	
	5841	Community Marketing	12,482	3,719	29.79%	
	5850	Oversight Fees	120,168	-	0.00%	
	5855	Short-Term Interest	6,750	-	0.00%	
	5860	Service Fees	6,522	-	0.00%	

EXCEL ACADEMY CHARTER - EAST
2020-21 DMS Monthly Update
Budget vs Actuals Detail

Budget vs Actuals	Object	Description	July Budget	Actuals 11/30/2020	% of Budget	Comments/Notes
	5865	Collaborative Fee	261,323	344,517	131.84%	
	5878	Student Assessment	9,234	9,900	107.21%	
	5880	Instructional Vendors & Consultants	420,000	70,159	16.70%	
	5890	Misc Other Outside Services	750	-	0.00%	
	5910	Telephone	5,400	3,277	60.69%	
	5930	Postage	2,595	1,452	55.95%	
	5940	Technology	22,500	-	0.00%	
	Total Services & Other Operating Costs		1,383,424	608,451	43.98%	
	Capital Expenditures					
	Total Capital Expenditures		-	-	0.00%	
	Other Outgo					
	Total Other Outgo		-	-	0.00%	
Total Expenditures			4,529,818	2,074,978	45.81%	
Operating Income/(Loss)			399,189	(1,062,960)	42%	YTD passed

EXCEL ACADEMY CHARTER - WARNER
2020-21 DMS Monthly Update
Budget vs Actuals Detail

Budget vs Actuals	Object	Description	July Budget	Actuals 11/30/2020	% of Budget	Comments/Notes
Revenue						
LCFF Revenue						
	8011	LCFF General Entitlement	8,575,223	3,172,832	37.00%	
	8012	EPA Entitlement	213,256	53,314	25.00%	
	8019	Prior Year Unrestricted Revenue	-	4,461	0.00%	
	8096	In-Lieu-Of Property Taxes	715,079	296,290	41.43%	
Total LCFF Revenue			9,503,558	3,526,897	37.11%	
Federal Revenue						
	8181	Federal IDEA SpEd Revenue	129,276	-	0.00%	
	8182	SpEd - Discretionary Grants	-	-	0.00%	
	8290	Other Federal Revenue	1,069,516	84,490	7.90%	
Total Federal Revenue			1,198,792	84,490	7.05%	
Other State Revenue						
	8311	AB602 State SpEd Revenue	613,111	-	0.00%	
	8550	Mandated Cost Reimbursements	23,295	23,295	100.00%	
	8560	State Lottery Revenue	221,487	-	0.00%	
	8590	Other State Revenue	112,000	80,993	72.32%	
Total Other State Revenue			969,893	104,288	10.75%	
Local Revenue						
	8660	Interest Income	52,500	7,632	14.54%	
	8698	Other Revenue (Suspense)	-	35,280	0.00%	
	8699	Other Revenue	25,000	10,171	40.68%	
Total Local Revenue			77,500	53,083	68.49%	
Total Revenue			11,749,743	3,768,758	32.08%	

EXCEL ACADEMY CHARTER - WARNER
2020-21 DMS Monthly Update
Budget vs Actuals Detail

Budget vs Actuals	Object	Description	July Budget	Actuals 11/30/2020	% of Budget	Comments/Notes
Expenditures						
Certificated Compensation						
	1100	Teacher Compensation	2,940,223	1,302,156	44.29%	
	1150	Teacher Stipends/Extra Duty	166,529	-	0.00%	
	1170	Health Care In Lieu	-	11,327	0.00%	
	1200	Student Support	65,487	22,885	34.95%	
	1200	Student Support Stipends	2,208	-	0.00%	
	1300	Certificated Administrators	815,470	395,164	48.46%	
	1350	Administrator Stipends/Extra Duty	17,420	-	0.00%	
	1370	Administrators Health Care In Lieu	-	2,959	0.00%	
	1900	Other Certificated Salaries	-	-	0.00%	
	1950	Other Stipends/Extra Duty	-	-	0.00%	
		Total Certificated Compensation	<u>4,007,337</u>	<u>1,734,491</u>	43.28%	
Classified Compensation						
	2300	Classified Administrators	-	-	0.00%	
	2400	Clerical & Technical Staff	413,179	227,096	54.96%	
	2450	Clerical & Technical Stipends	2,280	-	0.00%	
	2470	Clerical & Technical Health Care In Lieu	-	1,500	0.00%	
		Total Classified Compensation	<u>415,459</u>	<u>228,596</u>	55.02%	
Employee Benefits						
	3101	STRS Certificated	646,834	269,571	41.68%	
	3301	OASDI/Medicare	58,241	25,534	43.84%	
	3302	OASDI-Medicare Class	31,783	17,077	53.73%	
	3401	Health Care Certificated	510,408	170,093	33.32%	
	3402	Health Care Classified	91,680	39,440	43.02%	
	3501	Unemployment Insurance Certificated	12,022	22,848	190.05%	

EXCEL ACADEMY CHARTER - WARNER
2020-21 DMS Monthly Update
Budget vs Actuals Detail

Budget vs Actuals	Object	Description	July Budget	Actuals 11/30/2020	% of Budget	Comments/Notes
	3502	State Unemp Ins - Class	1,246	3,773	302.72%	
	3601	Workers' Comp Certificated	48,088	19,639	40.84%	
	3602	Workers' Comp Classified	4,985	4,175	83.74%	
	3901	Other Benefits Cert	3,287	632	19.23%	
	3902	Other Benefits Class	38,315	1,400	3.65%	
Total Employee Benefits			1,446,890	574,181	39.68%	
Books, Materials, & Supplies						
	4100	Textbooks & Core Curriculum	960,000	480,778	50.08%	
	4200	Other Reference Materials	-	-	0.00%	
	4205	Books and Other Ref Mats - Student Field Trips	-	3,082	0.00%	
	4310	Materials & Supplies	140,001	70,640	50.46%	
	4320	Office Supplies	8,470	6,370	75.20%	
	4330	Meals & Events	11,015	266	2.41%	
	4350	SPED Materials & Supplies	24,847	3,763	15.15%	
	4390	Other Supplies	21,584	175	0.81%	
	4400	Non-Capitalized Equipment	7,000	53,655	766.49%	
	4401	Non-Capitalized Equipment Non Student	-	-	0.00%	
Total Books, Materials, & Supplies			1,172,916	618,729	52.75%	
Services & Other Operating Costs						
	5100	SpEd Consultants and Subagreements	411,623	80,319	19.51%	
	5200	Travel & Conferences	35,704	2,191	6.14%	
	5210	Mileage Reimbursements	7,000	550	7.86%	
	5300	Dues & Memberships	17,996	6,267	34.82%	
	5400	Insurance	113,701	71,166	62.59%	
	5500	Operations & Housekeeping	-	-	0.00%	
	5610	Facility Rents & Leases	56,470	30,773	54.49%	
	5620	Equipment Leases	1,400	234	16.68%	

EXCEL ACADEMY CHARTER - WARNER
2020-21 DMS Monthly Update
Budget vs Actuals Detail

Budget vs Actuals	Object	Description	July Budget	Actuals 11/30/2020	% of Budget	Comments/Notes
	5630	Maintenance & Repair	-	35	0.00%	
	5800	Professional Services - Non-instructional	100,049	60,559	60.53%	
	5810	Legal	224,000	9,483	4.23%	
	5825	DMS Business Services	296,617	135,574	45.71%	
	5830	Non-Instructional Software Licenses/Fees	-	2,198	0.00%	
	5835	Field Trips	2,874	1,053	36.63%	
	5840	Advertising & Recruitment	19,131	3,033	15.86%	
	5841	Community Marketing	29,254	9,774	33.41%	
	5850	Oversight Fees	95,036	-	0.00%	
	5855	Interest Expense - Short Term	82,500	3,828	4.64%	
	5860	Service Fees	25,719	630	2.45%	
	5865	Collaborative Fee	609,753	147,649	24.21%	
	5870	Livescan Fingerprinting	-	50	0.00%	
	5878	Student Assessment	21,546	20,100	93.29%	
	5880	Instructional Vendors & Consultants	1,680,000	208,568	12.41%	
	5890	Misc Other Outside Services	1,750	-	0.00%	
	5895	Professional Development	-	54	0.00%	
	5910	Telephone	12,600	4,148	32.92%	
	5920	Internet	-	180	0.00%	
	5930	Postage	6,055	2,810	46.40%	
	5940	Technology	52,500	-	0.00%	
	Total Services & Other Operating Costs		3,903,278	801,225	20.53%	
	Capital Expenditures					
	Total Capital Expenditures		-	-	0.00%	
	Other Outgo					
	7438	Interest Expense	-	340	0.00%	
	Total Other Outgo		-	340	0.00%	
Total Expenditures			10,945,880	3,957,562	36.16%	
Operating Income/(Loss)			803,863	(188,804)	42%	YTD passed



The Collaborative

Excel Academies

DMS Business
Services

Mid- Year Check-in
Evaluation

December 2020

Objective & Process

Objective: DMS and The Collaborative will follow the evaluation process to continuously set action plans for greater success with our partnership and provide transparency to the board.

Process:

- Annual evaluation to be completed every June.
- Ongoing communication and weekly check-ins through out the year.
- Complete mid-year evaluation in December to reflect on progress and realign action items.
- Report to board progress and new action items in January.
- Repeat the process.

Action Items and Current Status

TOPICS

Finance: Maintaining the accounting records of the organization

Compliance & Reporting: Fiscal reporting to authorizers & others

Special Projects: How DMS has assisted in other areas

Action Items:

Provide a consistent Monthly Update Report for each school and board.

- Collaborative: 1 Disagree
- DMS: 3 Agree, 2 Strongly Agree

Set consistent meeting times with each Collaborative Director and DMS Finance team.

- Collaborative: 1 Strongly Disagree
- DMS: 3 Agree 3 Strongly Agree

Action Items and Current Status-Continued

Provide a timeline for known compliance reporting.

- Collaborative: 1 Strongly Disagree
- DMS: 3 Strongly Agree, 1 Agree, 1 Neutral

Keep informed of the frequent changes in legislature, CDE compliance, etc.

- Collaborative: 1 Strongly Disagree
- DMS: 1 Strongly Agree, 4 Agree

Collaborative Notes: Karl is very responsive to all my emails and questions when asked. He explains things very well when asked. He always makes himself available upon request.

Action Items and Current Status

Accounts Payable: Processing of vendor payments

Action Items:

Continued development of increasing user-friendliness of current AP systems used at DMS.

- Collaborative: 1 Disagree
- DMS: 4 Agree, 1 Neutral

Further Training from DMS to Collaborative in Microix.

- Collaborative: 1 Agree
- DMS: 2 Strongly Agree, 3 Agree

Check Vouchers and Aging worksheets sent to all Directors.

- Collaborative: 1 Strongly Agree
- DMS: 3 Strongly Agree, 3 Agree

Action Items and Current Status-Continued

Collaborative Notes: The AP is very friendly and responsive. The AP systems are not transparent and continue to be difficult to navigate.

Action Items and Current Status

Provide further transparency to directors on completion.

- Collaborative: No response
- DMS: 1 Strongly Agree, 3 Agree, 1 Neutral

DMS Notes: The retirement workload has increased greatly due to employee splits, furloughs, and consistent payroll changes affecting the data for retirement reporting.

Next Steps

Schedule meeting to gain clarity in survey responses.

Continue to focus on communication and the current action items.

Continue collaboration on year end transition.



Charter Services Organization

2020-21 First Interim Budget



The Collaborative Charter Services Organization

2020-21 First Interim Budget - Summary Analysis



SUMMARY OF RESULTS

This 2020-21 First Interim Budget update projects a budget surplus of \$44,823.

This is a decrease of (\$3,910) from the prior 2020-21 July Budget projected surplus of \$48,733.

This will allow The Collaborative Charter Services Organization to end this fiscal year with a balance of \$44,823.

The ending balance for this fiscal year is 2.6% of annual expenditures.

CASH FLOW

Operating cash flow is projected to remain positive throughout the fiscal year, as shown in the attached monthly cash flow.

The lowest projected ending cash balance this coming fiscal year, at the end of June, is \$44,823.

This represents 10 days of operating costs, on average.

CSO is expected to receive 25% of the total 2021-22 service fee in early July, which will boost cash on hand significantly.

This cash flow takes into account all currently projected impacts on cash flow at the time of this budget approval.

SIGNIFICANT CHANGES IN REVENUE

(Total Change from July Budget = decrease of (\$89,620), or -4.8% of previously projected revenues)

The Collaborative Charter Services Organization service fee is based on the individual schools' highest day of enrollment.

The continuation of Governor Newsom's "Hold Harmless" order, which froze the school's funding at 2019-20 P2 totals,

has impacted the CSO's revenue, as the schools have not been able to support enrolling additional students as planned.

The schools have yet to reach their initial projected enrollment counts that were assumed in July's budget.

Overall, the schools have 493 less students than their July estimate.

Using the current highest day of enrollment year to date, revenues will be (\$89,620) lower than the July projections

Adjustments to the 2021-22 fee structure are being discussed so that the organization will not be as impacted by

enrollment fluctuations next fiscal year.

The Collaborative Charter Services Organization

2020-21 First Interim Budget - Summary Analysis



SIGNIFICANT CHANGES IN EXPENSES

(Total Change from July Budget = decrease of (\$85,710), or -1.6% of prior year expenses)

Salaries and Benefits:

This includes all employee pay, plus benefits such as retirement, healthcare, Medicare, Social Security, etc.

Salaries and Benefits costs are (\$278,424) lower than in the prior cycle.

Reduction in certificated salaries is a result of reclassifying the shared employees to contracted service providers.

Two individuals are employed by and paid out of other organizations within the Collaborative, and services leased to the CSO.

Their expense is better represented as a contracted service provider, rather than an employee.

This will also ensure that the payroll GL actuals tie out to the 941s and other reports.

Equipment & Supplies:

This category includes computers, office supplies, and equipment.

Equipment & Supplies costs are projected at (\$15,400) lower than the July budget.

Due to COVID, staff are not using the office frequently or holding meetings in person.

CSO was able to cut expenses by delaying purchase of new office equipment & furniture.

CSO was also able to eliminate 'staff meals & events' budget due to a reduction of in-person contact.

Office Supplies expense actuals are trending lower than expected as well, likely due to staff working from home.

The Collaborative Charter Services Organization 2020-21 First Interim Budget - Summary Analysis



Services & Operating Expenses:

These include all contracted services as well as travel, insurance, rent, legal costs, and other service-related expenses.

Services & Operating costs are projected to be \$208,114 higher than the July budget.

This increase is solely due to the reclassification of the leased employees to contracted service providers.

Excluding the reclassified employees, the CSO was able to reduce service & operating expenses by approximately \$30k.

A majority of these savings were found in insurance & legal, as these are trending lower than initially projected.

Due to CSO's response to COVID, the budget will realize cost savings as travel was reduced to nearly zero.

Additionally, the need to rent out conference rooms or hotels for meetings was eliminated.

Other budget changes in this category are largely due to reclassification of general "professional services".

These services were moved to more specific categories, such as "software licenses & fees".

These coding changes provide greater clarity when tracking expenses, but does not change the overall ending fund balance.

Depreciation, Capital Outlay, and Other Outgo:

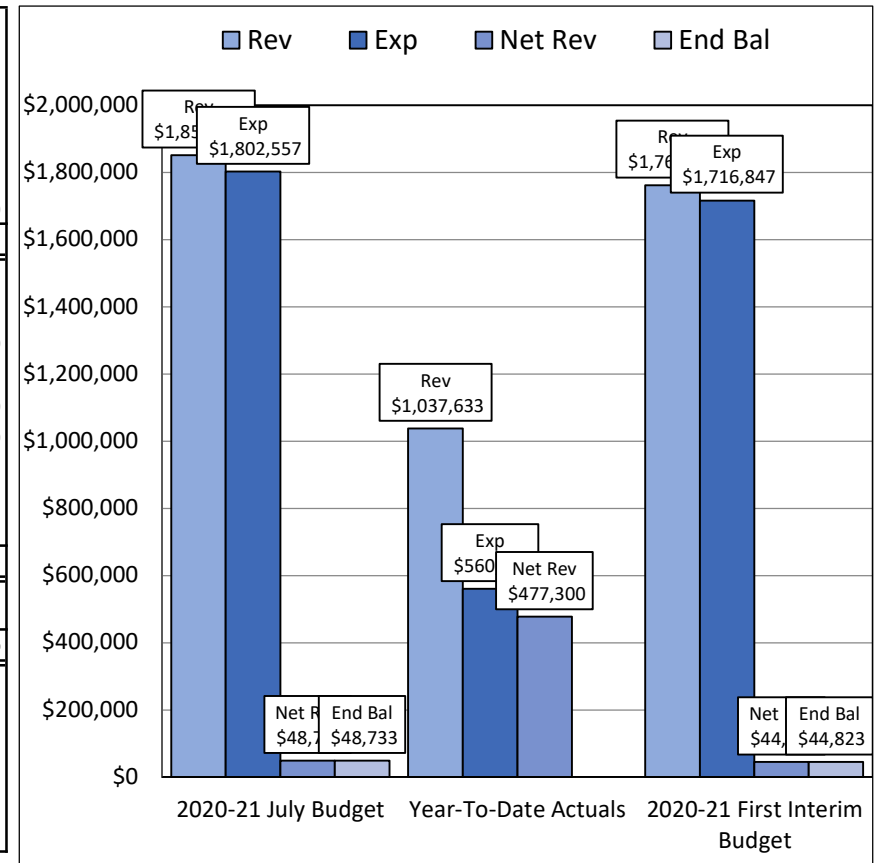
This category includes depreciation on fixed assets and interest on long-term debt.

These costs are projected at \$0 as CSO has no debt and has fully expensed equipment purchases in this budget.

The Collaborative Charter Services Organization

The Collaborative Charter Services Organization 2020-21 First Interim Budget BUDGET SUMMARY

	2020-21 July Budget	Year-To-Date Actuals	2020-21 First Interim Budget	Change
Revenues:				
Other Local Revenue	1,851,290	1,037,633	1,761,670	(89,620)
TTL Revenues	\$ 1,851,290	\$ 1,037,633	\$ 1,761,670	\$ (89,620)
Expenditures:				
Certificated Salaries	\$ 307,328	\$ 70,201	\$ 118,575	\$ (188,753)
Non-Certificated Salaries	814,374	314,963	817,530	3,156
Benefits	358,716	72,865	265,889	(92,827)
Books/Supplies/Materials	32,100	9,838	16,700	(15,400)
Services/Operations	290,040	92,467	498,154	208,114
Capital Outlay	-	-	-	-
Other Outgo	-	-	-	-
TTL Expenditures	\$ 1,802,557	\$ 560,333	\$ 1,716,847	\$ (85,710)
Net Revenues	\$ 48,733	\$ 477,300	\$ 44,823	\$ (3,910)
Beginning Balance July 1	\$ -		\$ -	
Ending Balance June 30	\$ 48,733		\$ 44,823	
Ending Balance as % of Exp.:	2.7%		2.6%	



The Collaborative Charter Services Organization

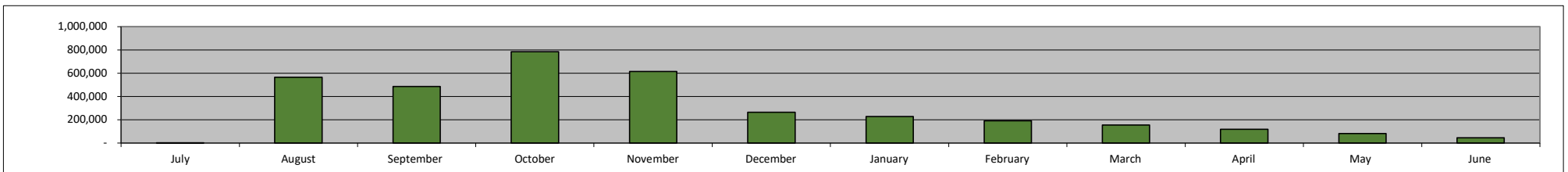
The Collaborative Charter Services Organization 2020-21 First Interim Budget BUDGET DETAIL & JULY BUDGET COMPARISON

Description	2020-21 July Budget	Year-To-Date Actuals	2020-21 First Interim Budget	Change From Prior Budget	Notes/Comments
REVENUES					
8677 Service Fee	1,826,290	1,015,978	1,736,670	(89,620)	
8689 Membership Fee	25,000	21,655	25,000	-	
TTL Other Local Revenue	1,851,290	1,037,633	1,761,670	(89,620)	
TTL REVENUES	1,851,290	1,037,633	1,761,670	(89,620)	
EXPENDITURES					
1000 - Certificated Salaries					
1300 Certificated Administrators	307,328	70,201	114,375	(192,953)	Moved leased Director of Student Services & SPED Coordinator to 5100
1350 Administrator Stipends/Extra Duty	-	-	4,200	4,200	
TTL Certificated Salaries	307,328	70,201	118,575	(188,753)	
2000 - Non - Certificated Salaries					
2300 Classified Administrators	317,565	82,917	228,240	(89,325)	Budget Analyst - moved to 2400
2350 Classified Administrator Stipends	-	-	1,200	1,200	
2370 Classified Administrator - Health Care In Lieu	-	600	2,400	2,400	
2400 Clerical & Technical Staff	496,809	230,846	583,290	86,481	Budget Analyst - moved from 2300
2470 Clerical & Technical - Health Care In Lieu	-	600	2,400	2,400	
TTL Non - Certificated Salaries	814,374	314,963	817,530	3,156	
3000 - Employee Benefits					
3101 STRS Certificated	20,942	-	-	(20,942)	STRS - Leased Director of Student Services. Moving to 5100
3211 Voluntary Retirement	55,435	-	-	(55,435)	Included in "Other Benefits"
3301/02 OASDI/Medicare	67,566	28,822	71,646	4,080	
3401/02 Health Care	183,840	26,661	155,040	(28,800)	Added 2 employees (\$28,800 - 4800 current CIL budget)/2
3501/02 Unemployment Insurance	18,848	3,178	8,190	(10,658)	Used 0.045%.
3601/02 Workers' Compensation	12,085	7,275	11,239	(846)	
3901/02 Other Benefits	-	6,929	19,774	19,774	457 - Employer Match. Used current election totals
TTL Employee Benefits	358,716	72,865	265,889	(92,827)	
4000 - Equipment/Supplies/Materials					
4200 Other Reference Materials	200	-	200	-	Cabinet Book
4320 Office Supplies	6,000	1,658	3,500	(2,500)	

Description	2020-21 July Budget	Year-To-Date Actuals	2020-21 First Interim Budget	Change From Prior Budget	Notes/Comments
4000 - Equipment/Supplies/Materials					
4330 Meals & Events	3,400	-	-	(3,400)	
4400 Non - Capitalized Equipment	10,000	2,262	3,000	(7,000)	
4420 Non - Capitalized Technology	12,500	5,918	10,000	(2,500)	2 new hires & 3 replacement laptops @\$2k each. \$10k total, to be depreciated .
TTL Equipment/Supplies/Materials	32,100	9,838	16,700	(15,400)	
5000 - Services & Operations					
5100 Subagreements For Services	-	-	238,910	238,910	Director of student services & SPED Coordinator - leased from other sites
5200 Travel & Conferences	5,000	-	-	(5,000)	
5210 Mileage Reimbursements	7,000	-	200	(6,800)	
5300 Dues & Memberships	9,000	128	4,850	(4,150)	CalChamber \$459, CASBO \$900, CSDC \$3500
5400 Insurance	42,000	2,699	20,898	(21,102)	\$20,888 Liability, \$10 Cyber security - \$10,637 Workers Comp moved to 3600
5500 Operations & Housekeeping	-	315	-	-	
5510 Utilities (General)	3,600	1,723	4,800	1,200	Electric. Average \$450/month
5610 Facility Rents & Leases	87,000	26,021	72,323	(14,677)	\$6,410/month rent + \$42.74/month Record storage + 105/Month CAM
5620 Equipment Leases	2,000	1,212	2,908	908	Logicopy Copier Lease \$242.31/Month base rate.
5800 Professional Services - Non - instructional	48,200	24,568	36,000	(12,200)	Board Stipends \$10k, IT Support \$8,400, Misc services \$5k, Paycom fees \$16k,
5810 Legal	35,500	12,778	20,000	(15,500)	Procopio - startup fees (\$11-12k). \$5k/charter was intended to cover this
5820 Audit & CPA	-	-	-	-	Audit expense will hit 20-21 but cash out in 21-22. Waiting for engagement letter from CLA
5825 DMS Business Services	26,060	13,422	26,029	(31)	1.45% of revenue.
5830 Non - Instructional Software Licenses/Fees	-	1,900	46,136	46,136	Docusign \$13k, IT support \$8,400, cloud storage \$17k DropBox \$800, Sage Intacct \$6,936
5840 Advertising & Recruitment	1,000	-	1,000	-	
5870 Livescan Fingerprinting	-	32	100	100	
5910 Telephone	20,280	5,647	16,000	(4,280)	
5920 Internet	3,000	26	3,000	-	
5930 Postage	400	1,996	5,000	4,600	About 50/50 FedEx & Pitney Bowes
TTL Services & Operations	290,040	92,467	498,154	208,114	
6000 - Capital Outlay					
6900 Depreciation	-	-	-	-	
TTL Capital Outlay	-	-	-	-	
7000 - Other Outgo					
7438 Interest on Long-Term Debt	-	-	-	-	
TTL Other Outgo	-	-	-	-	
TTL EXPENDITURES	1,802,557	560,333	1,716,847	(85,710)	
Revenues less Expenditures	48,733	477,300	44,823	(3,910)	
Beginning Fund Balance	-		-		
Net Revenues	48,733		44,823		
ENDING BALANCE	48,733		44,823		
ENDING BALANCE AS % OF OUTGO	2.7%		2.6%		

**The Collaborative Charter Services Organization
2020-21 First Interim Budget
2020-21 Projected Monthly Cash Flow Statement**

Description	2020-21 First Interim Budget	ACTUALS												Accruals	Total For Year
		July	August	September	October	November	December	January	February	March	April	May	June		
BEGINNING CASH		-	1,149	566,385	486,594	783,873	614,399	265,094	228,382	191,670	154,958	118,246	81,534	44,822	-
CASH INFLOWS															
REVENUES															
Other Local Revenues	1,761,670		565,455	56,929	304,190	111,059	103,434	103,434	103,434	103,434	103,434	103,434	103,434	103,434	1,761,670
TTL CASH INFLOWS	1,761,670	-	565,455	56,929	304,190	111,059	103,434	103,434	103,434	103,434	103,434	103,434	103,434	-	1,761,670
EXPENDITURES															
All Certificated Salaries	118,575		40,557	9,881	9,881	9,881	6,911	6,911	6,911	6,911	6,911	6,911	6,911	-	118,575
All Classified Salaries	817,530		111,111	67,977	67,553	68,322	71,795	71,795	71,795	71,795	71,795	71,795	71,795	-	817,530
All Benefits	265,889		14,686	17,952	28,528	11,698	27,575	27,575	27,575	27,575	27,575	27,575	27,575	-	265,889
All Materials & Supplies	16,700	2,446	4,554	385	2,384	69	980	980	980	980	980	980	980	-	16,700
All Services and Operations	498,154	6,538	28,352	17,485	27,534	188,053	32,885	32,885	32,885	32,885	32,885	32,885	32,885	-	498,154
All Capital Outlay/Depreciation															
All Other Outgo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TTL CASH OUTFLOWS	1,716,847	8,983	199,261	113,681	135,879	278,023	140,146	140,146	140,146	140,146	140,146	140,146	140,146	-	1,716,847
NET REVENUES	44,823														44,823
Due From other sites			(7,356)	(3,841)			11,196								(1)
AP/PR Current Liabilities			45,610	(19,198)	138,871	(2,511)	(162,772)								0
Due to other sites		10,132	160,787		(9,903)		(161,017)								(0)
NET INFLOWS/OUTFLOWS		10,132	199,042	(23,039)	128,968	(2,511)	(312,593)	-	-	-	-	-	-	-	(0)
ENDING CASH BALANCE		1,149	566,385	486,594	783,873	614,399	265,094	228,382	191,670	154,958	118,246	81,534	44,822		
Days Cash On Hand		0	120	103	167	131	56	49	41	33	25	17	10		





CEO SMART GOALS

2020 - 2021

Mid-Year Update

Throughout the 2020 - 2021 school year, I will serve in a collaborative role with the leadership team to sustain a clear focus on student achievement metrics and indicators and make certain there is ongoing communication and updates with our Board of Directors and authorizing school districts.

Evidence: During the 2020 - 2021 school year, I have been a participant in discussions and meetings with our Cabinet members and Executive Directors relative to student achievement. These collaborative sessions provided me with a better perspective and awareness of how we are assessing student achievement and what resources were needed. In addition, our Executive Directors have provided our Board of Directors with presentations pertaining to student achievement during board meetings and board presentations at authorizing district board meetings which will be scheduled later this school year.

Throughout the 2020 - 2021 school year, I will serve in a collaborative role to help facilitate an internal Special Education audit to further assess our best practices, areas of need, and a multi-year action plan to ensure the academic and social emotional needs of our Special Education students are being met.

Evidence: During the 2020 - 2021 school year, I have engaged in numerous discussions during our Cabinet meetings, 1:1 meetings with Executive Directors, and Special Education staff to gain insights and updates into various facets of Special Education to ensure we are compliant and serving our students with a free and public education. Special Education staff members have provided Special Education presentations during our board meetings. In

addition, I participate in CEO Council meetings scheduled via the Sonoma County Charter SELPA CEO Council meetings and discuss Special Education issues and topics during my 1:1 meetings with our authorizing district Superintendent's.

Throughout the 2020 - 2021 school year, I will serve as a coach, consultant, and mentor to further a high development, collaborative, and strengths based culture that inspires our managers and leaders to create superior stakeholder experiences.

Evidence: During the 2020 - 2021 school year, I orchestrated and facilitated numerous professional development activities during Cabinet meetings, leadership team meetings, and 1:1 meetings to leverage the strengths of each leader and to enhance the culture of our organization. Furthermore, I participate in a Cabinet book club on topics such as leadership and culture development as well as attend Association of California School Administrators professional development conferences.

Throughout the 2020 - 2021 school year, I will serve in a collaborative role with our Board of Directors, Executive Director(s), and Delta Managed Solutions to verify we are proactive and strategic relative to the multi-year fiscal management and fiscal health of our organization.

Evidence: During the 2020 - 2021 school year, I stay involved on a daily basis with the monitoring of our schools budgets and services provided by Delta Managed Solutions. In addition, I participate in various budget meetings to provide support and guidance relative to the monitoring of our budgets. Furthermore, we receive weekly updates during our Cabinet meeting with the CEO of DMS to discuss our progress and planning to ensure we meet all required budget deadlines.

Throughout the 2020 - 2021 school year, I will serve in a collaborative role with our Board of Directors and leadership team to ensure we have a CEO, Executive Director(s), and Board of Director succession plan, which will align to our short-term and long-term needs.

Evidence: At this point in the 2020 - 2021 school year, we have determined that our current Director of Human Resources is willing and able to serve as an Interim CEO if needed and I am looking forward to developing a process during the next few months for a long-term succession plan for a permanent CEO and when needed, new board members. Moreover, during my 1:1 meetings with our Executive Directors, I have inquired and engaged in discussion about a succession plan for their replacement.

EXCEL ACADEMY CHARTER SCHOOLS
Regular Meeting of the Board of Directors

Minutes

Thursday, December 3, 2020
Regular Meeting Begins at 12:30 p.m.



1185 Calle Dulce, Chula Vista, CA 91910
39251 Camino Las Hoyas, Indio, CA 92203
16222 Quail Rock Road, Ramona, CA 92065
1160 Cuyamaca Avenue, Chula Vista, CA 91911
1545 Apache Drive, Chula Vista, CA 91910

Excel Academy Charter Schools
1 Technology Drive, Bldg. I, Suite 811, Irvine, CA 92618

Zoom Meeting Information

Dial In: 1-669-900-9128

Meeting ID: 972 3583 7082

Join URL: <https://zoom.us/j/97235837082>

1. CALL TO ORDER AND ROLL CALL

Time 12:37 p.m.

1.1. Roll Call

William Hall	President - <i>Absent</i>
Michael Humphrey	Vice President - <i>Present</i>
Steve Fraire	Clerk - <i>Present</i>
Susan Houle	Member - <i>Absent for Roll Call</i>
Larry Alvarado	Member - <i>Present</i>

2. APPROVE/ADOPT AGENDA

It is recommended the Board of Directors adopt as presented, the agenda for the Regular Board meeting of December 3, 2020.

Moved by SFraire Seconded by LAlvarado

<u>Roll Call Vote:</u>	<u>Ayes</u>	<u>Nays</u>	<u>Abstained</u>	<u>Absent</u>
William Hall				X
Michael Humphrey	X			
Susan Houle				X
Steve Fraire	X			
Larry Alvarado	X			

Motion carried unanimously, 3-0.

3. ORGANIZATIONAL STRUCTURE OF THE BOARD

3.1. (Action) Oath of Office

It is recommended that Larry Alvarado, Board Member, be presented with the Oath of Office.

Kurt Madden, CEO presented the Oath of Office to Larry Alvarado. He raised his right and repeated the Oath of Office, and fully agreed.

Moved by SFraire Seconded by MHumphrey

<u>Roll Call Vote:</u>	<u>Ayes</u>	<u>Nays</u>	<u>Abstained</u>	<u>Absent</u>
William Hall				X
Michael Humphrey	X			
Susan Houle	X			
Steve Fraire	X			
Larry Alvarado	X			

Motion carried unanimously, 4-0.

Susan Houle joined the meeting at 12:40 p.m.

4. PUBLIC COMMENT - CLOSED SESSION

The public has a right to comment on any items of the closed session agenda. Members of the public will be permitted to comment on any other item within the Board's jurisdiction under section 8.0 Public Comments at Board Meetings.

5. ADJOURN TO CLOSED SESSION

Time: 12:41 p.m.

The Board will consider and may act on any of the Closed Session matters listed in Agenda Item 5.0.

Moved by SFraire Seconded by SHoule

<u>Roll Call Vote:</u>	<u>Ayes</u>	<u>Nays</u>	<u>Abstained</u>	<u>Absent</u>
William Hall				X
Michael Humphrey	X			
Susan Houle	X			
Steve Fraire	X			
Larry Alvarado	X			

Motion carried unanimously, 4-0.

6. CLOSED SESSION

Conference with Legal Counsel regarding Potential Litigation: 3 matters

There is significant exposure to litigation against the Agency pursuant to Government Code Section 54956.9(d)(2)

7. RECONVENE REGULAR MEETING

Time: 1:14 p.m.

Mike Humphrey, Vice President reported out "no action was taken during the closed session."

8. PLEDGE OF ALLEGIANCE

Led by: Mike Humphrey

9. PUBLIC COMMENTS/RECOGNITION/REPORTS

Please submit a Request to Speak to the Board of Directors using the chat feature on the right hand side of the Zoom platform. Please state the agenda item number that you wish to address prior to the agenda item being called by the Board President. Not more than three (3) minutes are to be allotted to any one (1) speaker, and no more than twenty (20) minutes on the same subject. This portion of the agenda is for comments, recognitions and reports to the Board and is not intended to be a question and answer period. If you have questions for the Board, please provide the Board President with a written statement and an administrator will provide answers at a later date.

10. CORRESPONDENCE/PROPOSALS/REPORTS

10.1. School Highlights - Presented by Heidi Gasca, Executive Director and
Keri Schneeweiss, Assistant Director of Operations

- *11th Grade Excel Student: Amanda Stein-Sigal*
- *11th Grade Excel Student: Jacob Averitt*

11. CONSENT CALENDAR

Items listed under Consent Calendar are considered routine and will be approved/adopted by a single motion. There will be no separate discussion of these items; however, any item may be removed from the Consent Calendar upon the request of any member of the Board, discussed, and acted upon separately.

Consent Calendar - Board Meeting Minutes

11.1. Minutes of the Regular Board Meeting that was held on November 12, 2020

Consent Calendar - Business/Financial Services

11.2. Check Register - November 2020

Consent Calendar - Personnel Services

11.3. Approval of Certificated Personnel Report

11.4. Approval of Employee Handbook Revisions, effective January 1, 2021

Consent Calendar - Policy Development

11.5. Approval of existing board policies reviewed and revised by staff for the 2020-21 school year.

Board Policy: Revised

4165-EA Employee Driving Policy

Moved by SHoule Seconded by LAlvarado

<u>Roll Call Vote:</u>	<u>Ayes</u>	<u>Nays</u>	<u>Abstained</u>	<u>Absent</u>
William Hall				X
Michael Humphrey	X			
Susan Houle	X			
Steve Fraire	X			
Larry Alvarado	X			

Motion carried unanimously, 4-0.

12. BUSINESS/FINANCIAL SERVICES

12.1. (Action) Approval of First Interim Financial Report and LCFF Budget Overview for Parents

It is recommended the Board approve the First Interim Financial Reports for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053) for the 2020-21 school year.

12.1a. 2020-21 First Interim Budget

Presented by Karl Yoder, Interim Finance Lead, Delta Managed Solutions (DMS)

12.1b. 2020-21 LCFF Budget Overview for Parents

Presented by Karl Yoder, Interim Finance Lead, Delta Managed Solutions (DMS)

Moved by SFraire

Seconded by SHoule

<u>Roll Call Vote:</u>	<u>Ayes</u>	<u>Nays</u>	<u>Abstained</u>	<u>Absent</u>
William Hall				X
Michael Humphrey	X			
Susan Houle	X			
Steve Fraire	X			
Larry Alvarado	X			

Motion carried unanimously, 4-0.

13. PERSONNEL SERVICES

13.1. (Action) Approval of Participation in California School and Employee Fund for Unemployment Insurance Benefit

It is recommended the Board approve two Resolutions presented to participate in the California School Employees Fund (SEF), and the State Disability Insurance Fund (SDI).

13.1a. Participation in State Disability Insurance (SDI)

13.1b. Participation in the California School Employees Fund (SEF) for Unemployment Insurance Benefits

Moved by LAlvarado

Seconded by SFraire

<u>Roll Call Vote:</u>	<u>Ayes</u>	<u>Nays</u>	<u>Abstained</u>	<u>Absent</u>
William Hall				X
Michael Humphrey	X			
Susan Houle	X			
Steve Fraire	X			
Larry Alvarado	X			

Motion carried unanimously, 4-0.

14. CALENDAR

The next scheduled meeting will be held virtually on January 14, 2021.

15. BOARD COMMENTS

The Board said the students' presentations were great and hope we can add this more often. The kids are what makes our heart smile, and makes it all worthwhile. They were the highlight of today. Larry said he is glad to be a part of Excel and looks forward to working with staff and the Board. The other Board members expressed their concern about the appointment process for the addition of a Board Member, saying it was an awkward experience for Larry, and thought it was harder on the members who had to deliberate. We have to do a better job on the interview process next time. Larry definitely has a welcome spot on the Excel Board. Thank you.

16. CEO COMMENTS

The CEO thanked the Board Members for their kind words. He thanked Larry and expressed he is happy to have him on board as the 5th member, and that we will work with him on the onboarding process. He also said the highlights from today were the children and it is good for them to see our Board too. Great job with the first interim benchmark, this is really key to make sure we are good to go. Let's keep moving on, stay positive and healthy. Happy Holidays.

17. ADJOURNMENT

The Regular meeting of the Board of Directors adjourned at 1:49 p.m.

Moved by SFraire

Seconded by S Houle

<u>Roll Call Vote:</u>	<u>Ayes</u>	<u>Nays</u>	<u>Abstained</u>	<u>Absent</u>
William Hall				X
Michael Humphrey	X			
Susan Houle	X			
Steve Fraire	X			
Larry Alvarado	X			

Motion carried unanimously, 4-0.

Signed:

Signed:

Kurt Madden
Secretary, Governing Board

Steve Fraire
Clerk, Governing Board

EXCEL ACADEMY CHARTER SCHOOLS
Special Meeting of the Board of Directors

Minutes

Friday, December 18, 2020
Special Meeting Begins at 11:00 a.m.



1185 Calle Dulce, Chula Vista, CA 91910
39251 Camino Las Hoyas, Indio, CA 92203
16222 Quail Rock Road, Ramona, CA 92065
1160 Cuyamaca Avenue, Chula Vista, CA 91911
1545 Apache Drive, Chula Vista, CA 91910

Excel Academy Charter Schools
1 Technology Drive, Bldg. I, Suite 811, Irvine, CA 92618

Zoom Meeting Information

Dial In: 1-669-900-9128

Meeting ID: 978 9007 0012

Join URL: <https://zoom.us/j/97890070012>

1. CALL TO ORDER AND ROLL CALL

Time 11:05 a.m.

1.1. Roll Call

William Hall	President	<i>Present</i>
Michael Humphrey	Vice President	<i>Present</i>
Steve Fraire	Clerk	<i>Absent for Roll Call</i>
Susan Houle	Member	<i>Present</i>
Larry Alvarado	Member	<i>Present</i>

2. APPROVE/ADOPT AGENDA

It is recommended the Board of Directors adopt as presented, the agenda for the Special Board meeting of December 18, 2020.

Moved by MHumphrey Seconded by LAlvarado

<u>Roll Call Vote:</u>	<u>Ayes</u>	<u>Nays</u>	<u>Abstained</u>	<u>Absent</u>
William Hall	X			
Michael Humphrey	X			
Susan Houle	X			
Steve Fraire				X
Larry Alvarado	X			

Motion carried unanimously, 4-0.

3. PLEDGE OF ALLEGIANCE

Led by: William Hall

4. PUBLIC COMMENTS/RECOGNITION/REPORTS

Please submit a Request to Speak to the Board of Directors using the chat feature on the right hand side of the Zoom platform. Please state the agenda item number that you wish to address prior to the agenda item being called by the Board President. Not more than three (3) minutes are to be allotted to any one (1) speaker, and no more than twenty (20) minutes on the same subject. This portion of the agenda is for comments, recognitions and reports to the Board and is not intended to be a question and answer period. If you have questions for the Board, please provide the Board President with a written statement and an administrator will provide answers at a later date.

5. BUSINESS/FINANCIAL SERVICES

5.1. (Action) Approval of Sage Intacct Order Schedule for Accounting Software Services

It is recommended the Board approve the Sage Intacct Order Schedule for Accounting Software Services for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Kurt Madden, CEO respectfully asked to amend the motion for approval since the CSO does not have a quorum, and add the phrase “Pending the approval of the CSO Board which is scheduled to reconvene at 1:00 p.m.”

Zach Moore, from Sage Intacct presented the Accounting Software Services to the Board of Directors.

Moved by MHumphrey Seconded by SFraire

<u>Roll Call Vote:</u>	<u>Ayes</u>	<u>Nays</u>	<u>Abstained</u>	<u>Absent</u>
William Hall	X			
Michael Humphrey	X			
Susan Houle	X			
Steve Fraire	X			
Larry Alvarado	X			

Motion carried unanimously, 5-0.

Steve Fraire joined the meeting at 11:12 a.m.

6. CALENDAR

The next scheduled meeting will be held virtually on January 14, 2021.

7. BOARD COMMENTS

The Board thanked Tim, Zach and their teams for putting together this thorough analysis and wished everyone luck during the implementation. They also said this was a great collaboration across all of the schools today and they are excited to see that we are going to have control over the finances saying “we are moving into the right direction.” Thank you again for all the work everyone put into this. Happy holidays, stay safe, and healthy.

8. CEO COMMENTS

The CEO gave a big shout out to all the Board Members for making themselves available for the special meeting today, and to Tim and all staff for the heavy lifting. There were so many components that went into this, but he knows at the end of the day we are going to be in a much better spot. He extended a warm welcome to Zach and said he would like him to come back on a quarterly basis to give us and the Board a brief update as to where we are. That way we are always in the dialog as a prevention mode rather than a reaction mode. He thanked all the Boards for putting these resources in place and said happy holidays to everyone.

9. ADJOURNMENT

The special meeting of the Board of Directors adjourned at 12:02 p.m.

Moved by MHumphrey Seconded by SHoule

<u>Roll Call Vote:</u>	<u>Ayes</u>	<u>Nays</u>	<u>Abstained</u>	<u>Absent</u>
William Hall	X			
Michael Humphrey	X			
Susan Houle	X			
Steve Fraire	X			
Larry Alvarado	X			

Motion carried unanimously, 5-0.

Signed:

Signed:

Kurt Madden
Secretary, Governing Board

Steve Fraire
Clerk, Governing Board

ACH00826	11/24/2020	Mobile Tutors, Inc.(Dan Lee)	264204578	77	\$2,245.00
ACH00827	11/24/2020	Nataly Jewel	264204589	77	\$972.75
ACH00828	11/24/2020	Oku Education	264204597	77	\$810.00
ACH00829	11/24/2020	Play Your Part, Inc.	264211102	77	\$120.00
ACH00830	11/24/2020	Rebecca Linn Starbeck	264204636	77	\$241.00
ACH00831	11/24/2020	Robin Nesom Young	264204642	77	\$353.63
ACH00832	11/24/2020	Roos Music	264204650	77	\$1,475.85
ACH00833	11/24/2020	Southern California Dance Academy	264211105	66	\$160.00
ACH00834	11/24/2020	Spanish Advantage	264211106	66	\$300.00
ACH00834	11/24/2020	Spanish Advantage	264211106	77	\$140.00
ACH00835	11/24/2020	The Music Abode	264204676	77	\$319.29
ACH00836	11/24/2020	Veronica Gutierrez	264204674	77	\$130.00
ACH00837	11/24/2020	Victoria Panikvar-Frazier	264204698	77	\$274.50
ACH00838	11/24/2020	William Fritz	264211088	77	\$540.00
ACH00839	11/24/2020	Writtenburg Door	264204706	77	\$4,859.15
ACH00850	12/3/2020	Delta Managed Solutions	EAC 12-20	77	\$9,008.32
ACH00851	12/3/2020	Delta Managed Solutions	EACE 12-20	66	\$12,118.68
ACH00852	12/3/2020	Amazon Capital Services, Inc.	11XY-DFT3-46XH	77	\$368.43
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1364-6H67-HY1R	77	\$63.42
ACH00852	12/3/2020	Amazon Capital Services, Inc.	13MF-NJHJ-YGTH	77	\$144.59
ACH00852	12/3/2020	Amazon Capital Services, Inc.	14K3-MDHD-XJ7L	66	\$57.29
ACH00852	12/3/2020	Amazon Capital Services, Inc.	167P-YCQ6-P6FX	77	\$53.23
ACH00852	12/3/2020	Amazon Capital Services, Inc.	16DK-CQHH-DD4D	77	\$8.61
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1CQW-F3KL-HYL9	77	\$28.51
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1FMV-XXVK-RXGH	77	\$39.36
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1G77-4RXN-HLFP	66	\$37.62
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1G77-4RXN-YCQ3	77	\$54.57
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1G93-TNMW-P69X	66	\$445.65
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1H6C-YGJP-XP4J	66	\$230.43
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1JTH-1HND-HLFJ	77	\$37.36
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1JTH-1HND-RQRQ	66	\$56.70
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1JTH-1HND-TG3H	66	\$115.47
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1K93-3RHT-FTL1	66	\$272.32
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1KYT-9DNM-D4KJ	66	\$72.08
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1L4W-DXLY-FGKR	77	\$18.31
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1LT6-74TR-R6DP	77	\$12.92
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1LT6-74TR-YKGQ	77	\$98.40
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1M31-J37X-TLH6	66	\$27.22
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1M31-J37X-XK1R	77	\$110.36

ACH00852	12/3/2020	Amazon Capital Services, Inc.	1MY6-DJ7G-C4LW	77	\$5.12
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1MY6-DJ7G-C7H4	77	\$4.11
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1N73-RPW9-Y1MN	77	\$21.32
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1PKC-YFMD-3HPG	77	\$58.14
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1Q7M-M636-XH79	77	\$32.48
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1QQ9-LYQF-VYNT	66	-\$80.39
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1QWH-KCVJ-CN3H	77	\$53.70
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1QWH-KCVJ-NQT1	77	\$19.34
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1TFX-J1WN-6HYP	77	\$33.05
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1TFX-J1WN-PD99	77	\$28.51
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1WTV-6QN9-J4CQ	77	\$424.32
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1X3M-FMJN-HKVM	77	\$75.17
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1XLR-6YDF-P3Q9	66	\$40.49
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1XLR-6YDF-PJCR	77	\$37.38
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1XN9-D64Q-WMC6	66	\$95.68
ACH00852	12/3/2020	Amazon Capital Services, Inc.	1Y9Q-6C46-LRNY	66	\$89.08
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1364-6H67-4D4X	77	-\$18.31
ACH00853	12/3/2020	Amazon Capital Services, Inc.	143N-7PJT-HR1X	77	\$243.41
ACH00853	12/3/2020	Amazon Capital Services, Inc.	16C1-7P3P-MRR6	77	\$93.90
ACH00853	12/3/2020	Amazon Capital Services, Inc.	19WX-9Q3M-QD6D	66	\$166.24
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1CPT-K99F-TCF3	66	\$118.91
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1D96-3VG3-TLPX	66	\$271.85
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1DJX-QJVV-P1CL	77	\$36.23
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1FNG-HY3J-X3D7	77	\$72.59
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1HFR-4PKJ-MHM1	77	\$142.01
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1KWL-3JQH-3D9Y	77	\$19.64
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1MNH-C799-R9YQ	77	\$90.44
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1PK3-1GFL-YY3P	77	\$4.29
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1PK3-1GFL-YY3Pa	77	\$44.93
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1QGL-PDYR-6H7N	77	\$202.60
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1QQ9-LYQF-FRQW	66	\$53.74
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1VW4-MXJQ-CQHK	77	\$36.05
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1VW4-MXJQ-W3NH	77	\$49.97
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1VWL-RKH6-YCR4	77	\$18.56
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1WDN-LNNX-CHFG	77	\$432.79
ACH00853	12/3/2020	Amazon Capital Services, Inc.	1YFR-GDLW-KP6N	66	\$70.70
ACH00854	12/3/2020	Effectual Educational Consulting Services - Mission Viejo	4476	77	\$920.00
ACH00855	12/3/2020	Effectual Educational Consulting Services - Mission Viejo	4477	66	\$1,910.00
ACH00856	12/3/2020	Inspire Communication, Inc.	EX20201031	66	\$750.00

ACH00857	12/3/2020	Natalie Neal	2142	77	\$1,125.00
ACH00858	12/3/2020	Natalie Neal	2316	66	\$85.00
ACH00859	12/4/2020	27 Turtles, LLC	264219743	77	\$250.00
ACH00860	12/4/2020	Ardent Academy for Gifted Youth	264219739	77	\$420.00
ACH00861	12/4/2020	Cindi Washam	264219761	66	\$270.00
ACH00862	12/4/2020	Farida HSU	264219746	77	\$1,316.75
ACH00863	12/4/2020	Martha G. Desmond	264219757	77	\$116.00
ACH00864	12/4/2020	Jenny Del Greco	264219832	77	\$560.00
ACH00865	12/4/2020	STEM Center USA	264219771	66	\$170.00
ACH00866	12/4/2020	Underground Dance Company	264219775	77	\$90.00
ACH00867	12/4/2020	Universal Martial Arts Center	264219776	66	\$120.00
ACH00868	12/4/2020	Amazon Capital Services, Inc.	11QT-JKHM-XVJD	77	\$75.86
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1364-6H67-JP6Q	77	\$7.59
ACH00868	12/4/2020	Amazon Capital Services, Inc.	13VC-9CDW-N7QY	66	\$15.86
ACH00868	12/4/2020	Amazon Capital Services, Inc.	16GR-49DQ-7JCH	66	\$76.75
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1CGJ-63D3-CM6D	66	\$12.89
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1CVL-Y1GF-TVLW	77	\$96.86
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1FMV-XXVK-LJ3Y	66	\$65.10
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1GXW-PVTP-TDXM	77	\$182.00
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1GYW-X7CT-Y69Y	66	\$235.79
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1HFR-4PKJ-46VV	66	\$40.04
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1HMD-1WWQ-C66V	66	\$12.19
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1JCK-4FKG-PLXV	66	\$214.19
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1JKX-QQCT-RNMR	66	\$336.59
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1KYT-9DNM-F1JM	77	\$182.30
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1NQ7-MMYJ-NJW1	77	\$51.70
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1Q7L-4TKV-9L1N	66	\$4.18
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1Q7L-4TKV-WDXN	66	\$8.81
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1QJG-JMWQ-WFX1	66	\$67.88
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1QVY-LMGP-WPRK	66	\$10.66
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1QWH-KCVJ-GQY9	77	\$142.42
ACH00868	12/4/2020	Amazon Capital Services, Inc.	1X3M-FMJN-LT7G	77	\$283.08
ACH00869	12/8/2020	Paul, Plevin, Sullivan & Connaughton LLP	49682	66	\$6,080.80
ACH00870	12/8/2020	Paul, Plevin, Sullivan & Connaughton LLP	49694	66	\$90.75
ACH00870	12/8/2020	Paul, Plevin, Sullivan & Connaughton LLP	49694	77	\$211.75
ACH00871	12/10/2020	Amazon Capital Services, Inc.	11NN-P11L-N4PH	77	\$21.71
ACH00871	12/10/2020	Amazon Capital Services, Inc.	13YC-KX16-T1TH	66	\$7.60
ACH00871	12/10/2020	Amazon Capital Services, Inc.	13YR-7MK3-FD9W	77	\$26.90
ACH00871	12/10/2020	Amazon Capital Services, Inc.	13YR-7MK3-PG6C	77	\$57.63

ACH00871	12/10/2020	Amazon Capital Services, Inc.	143V-HTHT-LCM7	77	\$71.97
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1646-C1M7 -3JDM	66	\$73.46
ACH00871	12/10/2020	Amazon Capital Services, Inc.	16C1-7P3P-PMT3	77	\$39.79
ACH00871	12/10/2020	Amazon Capital Services, Inc.	179C-M949-VXPG	66	\$38.31
ACH00871	12/10/2020	Amazon Capital Services, Inc.	17WD-9HY9-NJVD	77	\$23.91
ACH00871	12/10/2020	Amazon Capital Services, Inc.	19HK-LFJY-KF4M	77	\$58.44
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1CGL-RWR1-TH3G	66	\$188.20
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1CY1-QVXF-M3NR	77	\$15.94
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1H76-X7T6-L713	66	\$145.23
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1H76-X7T6-LRJL	77	\$105.22
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1LDW-4LMF-Q39V	77	\$26.42
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1PKC-YFMD-94ML	77	\$187.16
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1RH3-CC1D-WFWH	77	-\$14.13
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1RJH-4WMR-9MTD	77	\$40.92
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1RJM-MQ14-FGHW	77	\$54.83
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1RJR-34C3-L3JT	77	\$164.19
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1RJR-34C3-M993	77	\$29.12
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1THV-C76J-6WTH	77	\$83.60
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1VW4-MXJQ-Q411	77	\$99.92
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1VWL-RKH6-WN3F	77	\$61.06
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1X1P-R74X-M447	66	\$45.55
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1XVF-64T7-6T9J	77	\$154.67
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1XVF-64T7-QWLJ	66	\$164.63
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1YDK-RR69-X94Y	77	\$68.45
ACH00871	12/10/2020	Amazon Capital Services, Inc.	1YWM-W6V1-DWTY	66	\$29.08
ACH00872	12/10/2020	MEL Science	JE2020081717	66	\$314.10
ACH00873	12/10/2020	MEL Science	LJ2020081304	77	\$314.10
ACH00874	12/10/2020	MEL Science	LK2020081416	77	\$314.10
ACH00875	12/10/2020	MEL Science	TV2020081716	66	\$279.20
ACH00876	12/10/2020	Amazon Capital Services, Inc.	11Q3-GYCV-WJFL	77	\$112.84
ACH00877	12/10/2020	ACA Tutoring, Inc.	264230707	66	\$420.00
ACH00877	12/10/2020	ACA Tutoring, Inc.	264230707	77	\$210.00
ACH00878	12/10/2020	Amber Barney	264230834	77	\$210.00
ACH00879	12/10/2020	American Academy of Strategic Education	264230711	77	\$270.00
ACH00880	12/10/2020	Arbor Learning Community	264230722	66	\$330.00
ACH00880	12/10/2020	Arbor Learning Community	264230722	77	\$3,285.00
ACH00881	12/10/2020	A Thinking Place, Inc	264228787	77	\$74.00
ACH00882	12/10/2020	Aubrey Torres	264230893	66	\$240.00
ACH00883	12/10/2020	AVPA at La Sierra University	264230738	77	\$285.00

ACH00884	12/10/2020	Ballet Kukan Academy	264230739	66	\$379.60
ACH00885	12/10/2020	Barbara Ann Scott	264230740	77	\$150.00
ACH00886	12/10/2020	Bionerds	264230741	77	\$309.60
ACH00887	12/10/2020	Breanna Rausch	264230751	77	\$556.00
ACH00888	12/10/2020	Brenda Harp	264230752	77	\$847.42
ACH00889	12/10/2020	Bridges Equestrian, Inc	264230753	77	\$250.00
ACH00890	12/10/2020	Catherine J. Doretti	264230894	77	\$900.00
ACH00891	12/10/2020	Christine Charley	264230766	77	\$50.00
ACH00892	12/10/2020	Christian Arts & Theatre	264230765	77	\$760.00
ACH00893	12/10/2020	Claremont Community School of Music	264230769	66	\$1,432.00
ACH00894	12/10/2020	Coastal Music Studios	264230770	66	\$140.00
ACH00894	12/10/2020	Coastal Music Studios	264230770	77	\$140.00
ACH00895	12/10/2020	Cogito International, Inc	264230771	66	\$210.00
ACH00896	12/10/2020	Creative Creatures & Co.	264230775	66	\$114.25
ACH00896	12/10/2020	Creative Creatures & Co.	264230775	77	\$768.75
ACH00897	12/10/2020	Creative Learning Place Inc	264230778	66	\$306.75
ACH00898	12/10/2020	Daniel Alarco, Jr.	264230807	77	\$125.00
ACH00899	12/10/2020	Eiman Moossavian	264230841	77	\$1,612.70
ACH00900	12/10/2020	Frank Velasquez	264230755	66	\$372.50
ACH00900	12/10/2020	Frank Velasquez	264230755	77	\$1,371.25
ACH00901	12/10/2020	Greenwave Surf	264230796	77	\$947.26
ACH00902	12/10/2020	Gryphon Fitness Studio	264230797	77	\$180.00
ACH00903	12/10/2020	Kids in the Run, Inc.	264230799	66	\$61.25
ACH00903	12/10/2020	Kids in the Run, Inc.	264230799	77	\$274.05
ACH00904	12/10/2020	Inspyr Arts	264230806	66	\$71.25
ACH00905	12/10/2020	Intro 2 Skateboarding	264230808	66	\$240.00
ACH00905	12/10/2020	Intro 2 Skateboarding	264230808	77	\$240.00
ACH00906	12/10/2020	Irma D. Salcido	264230811	66	\$100.00
ACH00907	12/10/2020	Jamie Butterworth	264230813	66	\$63.75
ACH00908	12/10/2020	Jenna Harline	264230815	77	\$840.00
ACH00909	12/10/2020	Jenny Jee - El Park	264230816	66	\$360.00
ACH00909	12/10/2020	Jenny Jee - El Park	264230816	77	\$660.00
ACH00910	12/10/2020	JKG Learning, LLC	264230884	77	\$440.00
ACH00911	12/10/2020	John Henny Productions, LLC	264230819	66	\$175.00
ACH00912	12/10/2020	Joyful Music and Arts	264230823	66	\$720.00
ACH00913	12/10/2020	Laurie Ellen Meinhold	264230861	77	\$779.00
ACH00914	12/10/2020	Lessons By Design	264230833	66	\$175.00
ACH00915	12/11/2020	WM Music Lessons	264230901	66	\$510.00
ACH00915	12/11/2020	WM Music Lessons	264230901	77	\$795.00

ACH00916	12/11/2020	Matthew M Murray	264230836	66	\$720.00
ACH00917	12/11/2020	Meredith Barr	264230843	77	\$1,291.65
ACH00918	12/11/2020	Nataly Jewel	264230849	66	\$66.25
ACH00918	12/11/2020	Nataly Jewel	264230849	77	\$906.50
ACH00919	12/11/2020	Oku Education	264230853	77	\$900.00
ACH00920	12/11/2020	Robin Nesom Young	264230868	77	\$430.63
ACH00921	12/11/2020	Roos Music	264230872	77	\$1,296.00
ACH00922	12/11/2020	The Music Abode	264230889	77	\$319.29
ACH00923	12/11/2020	Veronica Gutierrez	264230888	77	\$130.00
ACH00924	12/11/2020	Victoria Panikvar-Frazier	264230898	77	\$486.50
ACH00925	12/11/2020	William Fritz	264230779	77	\$270.00
ACH00926	12/11/2020	Amazon Capital Services, Inc.	11QT-JKHM-CXMD	66	\$33.48
ACH00926	12/11/2020	Amazon Capital Services, Inc.	1G9H-PPTD-Y6CC	66	\$40.29
ACH00926	12/11/2020	Amazon Capital Services, Inc.	1LKH-L9FJ-3DRN	77	\$86.52
ACH00926	12/11/2020	Amazon Capital Services, Inc.	1LKH-L9FJ-F3JX	77	\$186.47
ACH00926	12/11/2020	Amazon Capital Services, Inc.	1LKH-L9FJ-VXPL	66	\$13.90
ACH00926	12/11/2020	Amazon Capital Services, Inc.	1Q7L-4TKV-1K4X	77	\$237.05
ACH00926	12/11/2020	Amazon Capital Services, Inc.	1QQ9-LYQF-DFMN	77	\$136.56
ACH00926	12/11/2020	Amazon Capital Services, Inc.	1QWH-KCVJ-JF9Y	66	\$74.62
ACH00926	12/11/2020	Amazon Capital Services, Inc.	1QWQ-6GPG-139Y	77	\$93.36
ACH00926	12/11/2020	Amazon Capital Services, Inc.	1RYT-J1YP-D6FM	77	\$81.71
ACH00926	12/11/2020	Amazon Capital Services, Inc.	1WXT-YCKH-XP9V	77	\$113.03
ACH00926	12/11/2020	Amazon Capital Services, Inc.	1YJR-F76K-FNHP	77	\$428.41
ACH00927	12/11/2020	Amazon Capital Services, Inc.	1DNK-TJPH-PJTM	77	\$10.86
ACH00927	12/11/2020	Amazon Capital Services, Inc.	1TGD-WJ43-TQ49	66	\$76.78
ACH00927	12/11/2020	Amazon Capital Services, Inc.	1YKK-CPDY-CJNL	77	\$102.25
ACH00928	12/11/2020	American Academy of Strategic Education	264202707	77	\$270.00
ACH00929	12/16/2020	Amazon Capital Services, Inc.	11QT-JKHM-WLQ6	66	\$143.70
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1364-6H67-N3FL	66	\$17.63
ACH00929	12/16/2020	Amazon Capital Services, Inc.	13FC-MKV6-G9DY	66	\$38.49
ACH00929	12/16/2020	Amazon Capital Services, Inc.	13GX-MVT3-KVLM	66	\$90.04
ACH00929	12/16/2020	Amazon Capital Services, Inc.	13GX-MVT3-MCXC	66	\$21.52
ACH00929	12/16/2020	Amazon Capital Services, Inc.	13MF-NJHJ-MXM3	77	\$67.31
ACH00929	12/16/2020	Amazon Capital Services, Inc.	14NR-D99C-QN64	66	\$112.30
ACH00929	12/16/2020	Amazon Capital Services, Inc.	14Q7-K74V-1FR9	66	\$32.21
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1641-F4DM-DLMJ	77	\$149.37
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1679-F949-T71D	66	\$154.45
ACH00929	12/16/2020	Amazon Capital Services, Inc.	17XP-6YLG-1D39	77	\$12.21
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1CNJ-JJ1Q-HCCF	77	\$8.57

ACH00929	12/16/2020	Amazon Capital Services, Inc.	1CNJ-JJ1Q-LPXC	77	\$45.02
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1CNW-HK71-QGHC	66	\$43.84
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1CWD-GXWF-T79P	77	\$48.77
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1G4Y-WVXN-61Y7	77	\$10.76
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1G4Y-WVXN-VYJT	77	\$94.80
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1HKD-HJ9X-MXXN	77	\$40.47
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1JRH-W96G-RWWR	77	\$68.00
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1LYX-L9NX-F33C	77	\$109.66
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1LYX-L9NX-PPH7	66	\$14.21
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1MHH-GH6G-LW9Y	77	\$252.20
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1N7X-9T3J-R17K	77	\$267.99
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1PR1-C6YC-LGVR	66	\$254.02
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1R37-3XMC-VJHL	77	\$32.89
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1R37-3XMC-X7C1	66	\$31.63
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1R37-3XMC-XXCC	77	\$5.38
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1VW4-MXJQ-GJ64	77	\$72.08
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1YFD-TK7H-LMC1	66	\$105.53
ACH00929	12/16/2020	Amazon Capital Services, Inc.	1YFR-GDLW-M4CT	77	\$269.11
ACH00930	12/16/2020	Amazon Capital Services, Inc.	14PR-3YGG-T73R	77	\$162.35
ACH00930	12/16/2020	Amazon Capital Services, Inc.	1PC9-JQPQ-G1Y9	66	\$108.78
ACH00930	12/16/2020	Amazon Capital Services, Inc.	1TPY-HF36-TFKK	77	\$26.34
ACH00930	12/16/2020	Amazon Capital Services, Inc.	1WTV-6QN9-WKCH	77	\$73.77
ACH00930	12/16/2020	Amazon Capital Services, Inc.	1YQQ-7LJ7-KQQQ	77	\$64.08
ACH00931	12/16/2020	Amazon Capital Services, Inc.	119P-LN4M-TPY7	77	\$10.98
ACH00931	12/16/2020	Amazon Capital Services, Inc.	11K3-3C3Q-71MC	77	\$61.60
ACH00931	12/16/2020	Amazon Capital Services, Inc.	11K3-3C3Q-DQ4F	77	\$233.86
ACH00931	12/16/2020	Amazon Capital Services, Inc.	193C-M1D3-L946	77	\$52.18
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1973-7T4D-PQKQ	77	\$42.20
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1973-7T4D-TJML	66	\$260.87
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1D6M-3Q36-WW7W	77	\$112.80
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1DJX-QJVV-X1WR	77	\$117.42
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1DR1-TW4P-V1J9	66	\$91.92
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1F1T-JTNN-PLTQ	66	\$235.40
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1F1T-JTNN-TYGX	66	\$34.14
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1G7Y-NVR9-4JH1	77	\$116.03
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1HNP-HMFK-FDCM	77	\$18.38
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1L4L-R7RX-9VVN	77	\$7.53
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1LVK-TRTJ-3R9L	77	\$36.40
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1P9T-T1CK-97MQ	66	\$7.65

ACH00931	12/16/2020	Amazon Capital Services, Inc.	1P9T-T1CK-JP9K	77	\$123.10
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1PPW-LD7F-QFDN	77	\$40.84
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1R9D-LDC6-JP1X	77	\$131.32
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1RGC-XPLG-P7F1	77	\$20.54
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1RJM-MQ14-T77N	77	\$99.88
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1RMT-YMQW-11JJ	66	\$141.30
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1TRK-HYRK-HYXP	77	\$216.38
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1X1N-RT3C-J9R6	77	\$87.09
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1X7D-G9VW-TGX3	77	\$86.12
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1XWJ-FJF4-3TK3	77	\$26.40
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1YT7-TXWD-LK3X	66	\$154.62
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1YT7-TXWD-NPKN	77	\$54.52
ACH00931	12/16/2020	Amazon Capital Services, Inc.	1YX9-1VLL-G6LJ	77	\$16.47
ACH00932	12/16/2020	Amazon Capital Services, Inc.	13QH-N69H-GRPY	77	\$89.30
ACH00932	12/16/2020	Amazon Capital Services, Inc.	14V7-KDPF-MGYJ	66	\$6.56
ACH00932	12/16/2020	Amazon Capital Services, Inc.	16M6-4L7P-HLJL	66	\$176.07
ACH00932	12/16/2020	Amazon Capital Services, Inc.	179J-G4PQ-MGMC	66	\$59.24
ACH00932	12/16/2020	Amazon Capital Services, Inc.	179J-G4PQ-XHML	77	\$80.03
ACH00932	12/16/2020	Amazon Capital Services, Inc.	19HK-LFJY-3YTJ	77	\$55.76
ACH00932	12/16/2020	Amazon Capital Services, Inc.	19MY-37MR-NJWW	66	\$43.08
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1CC9-7XG3-4R7R	77	\$70.39
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1CY1-QVXF-31TM	66	\$255.60
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1FH4-WVPR-F1PY	77	\$38.05
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1FH4-WVPR-LP19	77	\$73.94
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1FMV-XXVK-GPJD	66	\$308.94
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1FMV-XXVK-LHTJ	66	\$31.03
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1JJC-TQYD-L976	66	\$155.87
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1MC4-CV14-97W3	66	\$140.34
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1MVK-V1WQ-DPCC	77	\$4.28
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1NG1-R1C7-VJ1C	77	\$289.79
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1NG6-6DFC-RTHW	66	\$17.38
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1NG6-6DFC-VFX6	66	\$30.37
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1PXT-THFR-DMCL	66	\$11.92
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1Q91-XWR6-1C7W	66	\$47.06
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1QJY-YK3P-3Y41	77	\$61.17
ACH00932	12/16/2020	Amazon Capital Services, Inc.	1XLR-6YDF-N1LP	66	\$7.71
ACH00949	12/18/2020	Paul, Plevin, Sullivan & Connaughton LLP	50036	66	\$132.48
ACH00949	12/18/2020	Paul, Plevin, Sullivan & Connaughton LLP	50036	77	\$309.12
ACH00950	12/21/2020	27 Turtles, LLC	264258449	77	\$125.00

ACH00951	12/21/2020	Amanda Leigh Holiday	264258395	77	\$596.25
ACH00951	12/21/2020	Amanda Leigh Holiday	264258396	66	\$132.50
ACH00952	12/21/2020	Arbor Learning Community	264258408	77	\$2,995.00
ACH00952	12/21/2020	Arbor Learning Community	264258411	66	\$330.00
ACH00953	12/21/2020	Bionerds	264258423	77	\$309.60
ACH00954	12/21/2020	Breanna Rausch	264258696	77	\$556.00
ACH00955	12/21/2020	Caique Jiu-Jitsu Walnut Academy	264258438	66	\$660.00
ACH00956	12/21/2020	Christian Arts & Theatre	264258447	77	\$348.49
ACH00957	12/21/2020	Cindi Washam	264258537	66	\$270.00
ACH00958	12/21/2020	Dunamix Dance Project, Inc	264258472	77	\$120.00
ACH00959	12/21/2020	Edward V. West	264258473	77	\$1,021.50
ACH00960	12/21/2020	Erin Chianese	264258478	66	\$148.75
ACH00961	12/21/2020	Evolution Swim Academy Mission Viejo, LLC	264258479	77	\$444.00
ACH00962	12/21/2020	Holley Preston Magalhaes	264258612	77	\$660.00
ACH00963	12/21/2020	Irma D. Salcido	264258524	66	\$100.00
ACH00964	12/21/2020	Jing Ma	264258607	66	\$360.00
ACH00965	12/21/2020	Lilli S. Witczak	264258547	66	\$137.50
ACH00966	12/21/2020	Lisa Siebelink	264258657	77	\$342.00
ACH00967	12/21/2020	Michele Liem	264258562	66	\$115.00
ACH00968	12/21/2020	Miss Crady the Math Lady	264258569	77	\$1,627.25
ACH00969	12/21/2020	Miss Crady the Math Lady	264258581	66	\$162.50
ACH00970	12/21/2020	Play Your Part, Inc.	264258609	77	\$685.00
ACH00971	12/21/2020	Rebecca Linn Starbeck	264258613	77	\$296.00
ACH00972	12/21/2020	Richter Academy of Classical Dance	264258614	77	\$1,981.00
ACH00973	12/21/2020	Southern California Dance Academy	264258660	66	\$160.00
ACH00974	12/21/2020	Traditional Equitation School	264258665	66	\$260.00
ACH00975	12/21/2020	Writtenburg Door	264258689	77	\$4,942.65
ACH00975	12/21/2020	Writtenburg Door	264258690	66	\$771.50
ACH00976	12/21/2020	Amazon Capital Services, Inc.	14T4-JNCG-CGDF	77	\$68.39
ACH00976	12/21/2020	Amazon Capital Services, Inc.	16TF-39NF-1LYK	66	\$41.12
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1CC9-7XG3-LYPL	77	\$74.29
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1CJF-PYP4-XXTD	77	\$64.09
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1CKJ-7Y9N-JWWF	77	\$220.59
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1D4P-1LDD-DDJP	66	\$14.38
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1GMR-XDQQ-TM16	77	\$248.29
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1JWG-WMPJ-7VDH	66	\$74.36
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1JWG-WMPJ-91F4	77	\$7.53
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1K7X-3VQW-KPFN	66	\$105.71
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1MCP-K77K-MK94	77	\$153.85

ACH00976	12/21/2020	Amazon Capital Services, Inc.	1NG6-6DFC-T4TQ	66	\$125.25
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1RQG-F7T3-66YM	66	\$59.46
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1T3X-Y341-NX7K	77	\$6.45
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1TPY-HF36-DH6C-A	77	\$16.15
ACH00976	12/21/2020	Amazon Capital Services, Inc.	1TTC-QJ6M-7DTF	77	\$181.92
ACH00977	12/21/2020	MEL Science	IG2020120816	66	\$209.40
ACH00978	12/21/2020	Natalie Neal	2338	77	\$375.00
ACH00979	12/21/2020	Natalie Neal	2339	77	\$450.00
ACH00980	12/21/2020	Pediatric Therapy Associates	399	66	\$968.75
ACH00981	12/21/2020	TSW Therapy, Inc.	808	66	\$733.14
ACH00982	12/22/2020	Michael Humphrey	Dec 2020-MH	66	\$250.00
ACH00982	12/22/2020	Michael Humphrey	Dec 2020-MH	77	\$250.00
ACH00983	12/22/2020	Steve Fraire	Dec 2020-SF	66	\$250.00
ACH00983	12/22/2020	Steve Fraire	Dec 2020-SF	77	\$250.00
ACH00984	12/22/2020	Susan Houle	Dec 2020-SH	66	\$250.00
ACH00984	12/22/2020	Susan Houle	Dec 2020-SH	77	\$250.00
ACH00985	12/22/2020	William Hall	Dec 2020-WH	66	\$250.00
ACH00985	12/22/2020	William Hall	Dec 2020-WH	77	\$250.00
ACH0933	12/16/2020	Inspire Communication, Inc.	EX20201130	66	\$450.00
ACH0934	12/16/2020	McColgan and Associates Inc	3959	66	\$1,562.50
ACH0935	12/16/2020	Natalie Neal	1811	77	\$187.50
ACH0936	12/16/2020	Natalie Neal	2248	77	\$375.00
ACH0937	12/16/2020	Natalie Neal	2249	77	\$566.68
ACH0938	12/16/2020	Natalie Neal	2251	77	\$431.25
ACH0939	12/16/2020	Natalie Neal	2321	77	\$375.00
ACH0940	12/16/2020	Natalie Neal	2322	77	\$437.50
ACH0941	12/16/2020	Natalie Neal	2323	77	\$750.00
ACH0942	12/16/2020	Natalie Neal	2328	77	\$1,002.50
ACH0943	12/16/2020	Natalie Neal	2332	77	\$812.50
ACH0944	12/16/2020	Natalie Neal	2333	77	\$500.00
ACH0945	12/16/2020	Natalie Neal	2334	77	\$625.00
ACH0946	12/16/2020	Pediatric Therapy Associates	371-02	66	\$1,950.00
ACH0947	12/16/2020	Pediatric Therapy Associates	382-1	77	\$5,115.00
ACH0948	12/16/2020	TSW Therapy, Inc.	807	77	<u>\$8,574.41</u>

Report Total

\$3,570,140.81

EXCEL ACADEMY CHARTER SCHOOL

Agenda Item: 10.4

Date: January 14, 2021

	Correspondence/Proposals/Reports
X	Consent Agenda
	Business/Financial Services
X	Education/Student Services
	Personnel Services
	Curriculum
	Policy Development

Item Requires Board Action: X

Item is for Information Only:

Item: 2019-20 School Accountability Report Card (SARC) Questionnaire

Background:

The School Accountability Report Card (SARC) has been created to provide required information about Excel Academy Charter Schools to the community. The SARC also allows the community to compare schools regarding student achievement, environment, resources and demographics. Upon board approval, the SARC is posted on the website and shared with all stakeholders.

Fiscal Impact: N/A

2019-20 SARC Questionnaire

School Accountability Report Card

Due Date: Friday, December 18, 2020

Excel Academy Charter School

Table of Contents

1. General Information
2. School Logo
3. Mission Statement
4. Executive Director's Message
5. Parental Involvement
6. School Safety Plan
7. School Facility Information
8. Textbooks and Instructional Materials
9. Suspensions and Expulsions
10. Teacher Credentials
11. Teacher Qualifications
12. Professional Development
13. Ratio of Pupils to Academic Counselor
14. School Support Staff
15. Types of Services Funded
16. Career Technical Education
17. Class Size Distribution

Instructions

Use the Navigation Pane as a guide to filling out your questionnaire. Please answer each section completely.

- For all possible sections, we inserted the text from your 2018-19 SARC for your reference. Save some time now by reviewing each section and updating them as necessary.
- While most sections require the *past* 2019-20 school year data and text information, you will notice some sections require *current* 2020-21 school year data and text information.
- Please refer to the title and right-hand sidebar notes of each section for helpful information, and be sure to address all bullet points in the column to ensure SARC compliance.
- All sections listed are required in your SARC (unless otherwise noted). Red text in narrative sections indicates information that must be updated. The light-yellow fields require new data or info each year.

Due Date

To ensure enough time to create your SARC, submit it for review, make edits and finalize before the February state deadline, please complete your questionnaire by **Friday, November 13, 2020**.

Custom Photos

Personalize your SARC with custom photos! Just email us the pictures as attachments in a JPEG format. Examples include mascots, students (with parental consent), field trips, award ceremonies, sporting events, campus and teachers.

Contact us

Contact your SARC coordinator at any time with questions about completing this questionnaire. Your SARC coordinator Caitlin may be reached at (916) 669-5136 or by email through our team inbox at sarcproduction@sia-us.com.

Note

Please keep in mind that the California Department of Education may add or amend its reporting requirements before the deadline, so we will contact you to collect additional information if necessary.

1. General Information

Report information from the current 2020-21 school year		
District name:	Independent charter authorized by Helendale ESD	Provide the general information at left, and verify that the information is current. Note: Use the most current information available. If the principal for the 2019-20 school year has since changed, we suggest listing the current principal name on the SARC.
School name:	Excel Academy Charter School	
School address:	1 Technology Drive, Ste I-811 Irvine, CA 92618	
School phone number:	(949) 387-7822	
School grade levels:	TK-12	
Website:	www.excelacademy.education	
County-District-School (CDS) code:	36-67736-0139576	
Name of Executive Director:	Heidi Gasca	
Email address of Executive Director:	hgasca@excelacademy.education	

2. School Logo

Report information from the current 2020-21 school year		
(Optional)		Please provide the school logo or mascot here in a .jpeg or .gif format. You may also attach it to your email when you submit your questionnaire.

3. Mission Statement

Report information from the current 2020-21 school year		
School mission statement: (Required)	Excel Academy will provide flexible, personalized learning through a customized course of study that will educate, motivate, and instill a love of learning in each individual student. Teachers and parents will join together to maintain high expectations and promote academic excellence for all students, creating the next generation of leaders.	Please provide the school mission statement. <i>A mission statement is a public declaration that schools use to</i>

		<i>describe their founding purpose and major organizational commitments (what they do and why they do it).</i>
School Vision Statement: (Optional)	<p>Life is what you create ... at Excel Academy we bring students to LIFE through:</p> <p>LEARNING: The primary goal of Excel Academy is that each student continues to grow in knowledge, ability and social/emotional intelligence. Students are encouraged to work any time, any place and are supported by teachers, curriculum and staff that will adapt to the uniqueness inherent in every student and learning situation. Excel Academy pursues a learning environment where every student will be challenged by, enjoy, and help direct their own education.</p> <p>INDEPENDENCE: Excel Academy believes one of the key elements of an optimal education is to place the student in a climate where curiosity and exploration are rewarded. While Excel Academy's curriculum aligns itself to California's academic content standards, each family may avail themselves of alternative or supplemental learning resources that can help prepare each student for the real-life complexities of higher education and the ever-changing job market.</p> <p>FLEXIBILITY: Flexible pacing enables each student, under the guidance of the Teacher of Record, to target individual needs without the demands of a classroom. By developing an awareness of their own unique learning style and advancement in their communication abilities, students and families will be enabled to discover their greatest areas of need and direct their efforts accordingly.</p> <p>EMPOWERMENT: Excel Academy strives to empower students to take ownership of their education and develop not only the appropriate knowledge, skills, and abilities, but also the confidence, creativity, and discipline to help them adapt to the challenges and opportunities of the 21st century.</p>	<p>School vision statement is optional.</p> <p><i>A vision statement, or simply a vision, is a public declaration that schools use to describe their high-level goals for the future—what they hope to achieve if they successfully fulfill their mission.</i></p>
School Motto: (Optional)		<p>School motto is optional.</p> <p><i>A school motto is a sentence, phrase, or word expressing the spirit or purpose of your school.</i></p>
Governing Board: (Optional)	<p>Board of Education</p> <p>William Hall, President</p> <p>Michael Humphrey, Vice President</p> <p>Susan Houle, Clerk</p> <p>Steve Fraire, Member</p> <p>Larry Alvarado, Member</p>	Governing Board is optional.
Other: (Optional)	<p style="text-align: center;"><u>School Goals</u></p> <p>1. <u>Sustainable Growth</u>: Sustainable growth through strategic planning, marketing and optimizing resources in relationship to our budget.</p> <p>2. <u>Retention</u>: Sustainably retaining students through high academic expectations, intervention, integrity, innovation and collaboration.</p> <p>3. <u>Quality Programs</u>: Offer innovative personalized programs that offer flexibility, leadership, and independent learning. Develop and empower individual teams to deliver programs of integrity, accountability, and compliance.</p> <p>4. <u>Parent & Student Service</u>: Serving parents and students with integrity and respect to the highest possible standard developed through intuitive solutions understanding educational needs.</p>	<p>Provide additional optional information such as:</p> <ul style="list-style-type: none"> ● Quotes ● History ● School Leadership, etc.

5. Collaborative Partnerships: Creating and facilitating partnerships within internal departments with community providers, other NCB schools, professional associations membership associations, and authorizing districts

6. Accountability and Compliance: Define direction that creates and shapes policies and procedures, clarifies deadlines, roles and responsibilities, and accountability to maintain streamlined processes. Develop benchmark goals and identify implementation initiatives to improve California state dashboard ratings in all areas.

7. Professional Development: Growing, enhancing, and developing skills in our staff. Defining and demonstrating roles and responsibilities, identifying strengths and weaknesses, providing methods of support including training and access to materials to enhance performance.

4. Executive Director’s Message

Report information from the previous 2019–20 school year to present

Executive Director’s message:

Excel Academy Charter School (EACS) offers a tuition-free independent study personalized learning model for students in grades TK–12. Our high-quality model of education is rooted in flexible learning, personalized pacing schedules, and proven systems of support. In collaboration with the credentialed Teacher of Record (ToR), parents select from a variety of educational resources, services, and materials. Using these educational resources, families build a customized learning experience for their students, tailored to fit their academic, emotional, and social needs. Every student enrolled in EACS benefits from the expertise, guidance, and oversight of a ToR. Our credentialed ToRs work with their assigned students to identify and implement a personalized learning plan for each student. ToRs and students meet face to face and via a variety of platforms throughout the monthly learning periods to ensure students’ unique needs are met, and the students are showing academic growth and progress through grade level and state standards.

Excel Academy’s goals for the 2019–20 school year were to hire and retain multiple subject and single subject certificated TK–12 teachers to support our wide geographic region. EACS identified and provided curriculum that was aligned to the Common Core State Standards (CCSS), as well as implemented training and supplied resources to all students, parents, and teachers on the CCSS.

During the 2020–21 school year, EACS will continue to involve all stakeholders in decision-making at the school level through participation in the Scholastic Council (SSC), English Learner Advisory Council (ELAC), Parent Advisory Council (PAC), and streamlined daily, weekly, and monthly communication. The focus on the connections between stakeholders and EACS is to foster investment in education and provide meaningful transparent communication. EACS will continue to gather baseline data from internal assessments and the upcoming California Assessment of Student Performance and Progress (CAASPP) results, and will work to meet or exceed student performance data in both English language arts (ELA) and math by 2% each year. EACS will establish baseline data of college and career readiness at the conclusion of the 2020–21 school year and will strive to increase 2% annually in the number of students that are college and career ready. EACS will maintain a high rate of average daily attendance (ADA) at 95% or higher or increase ADA by 2% each school year until reaching 95% or above, and will maintain less than a 1% suspension and expulsion rate. EACS will show an overall positive rating of 90% or higher in school safety and connectedness in the following surveys: Local Control and Accountability Plan (LCAP) Parent Survey, LCAP Teacher Survey, LCAP Student Survey, Teacher End of the Year Survey, and Parent End of the Year Survey. EACS aims for students to complete all standards in ELA, math, science, social studies, visual and performing arts, physical education, health and world

This section appears on the front page of the SARC. Please include your most important points, such as your school’s:

- Learning and teaching philosophy
- Awards and recognitions
- Accomplishments from the past 2019–20 school year
- Goals for the current 2020–21 school year

What makes your school special and unique? Use this section as a marketing piece and selling point to increase average daily attendance.

languages, while working to be creative and complex thinkers, effective communicators, community and global participants, and empowered, independent learners.

5. Parental Involvement

Report information from the current 2020-21 school year

Parental involvement opportunities and contact information:

Excel Academy offers several opportunities for parental involvement through the Schoolsite Council (SSC), English Learner Advisory Committee (ELAC), and Parent Advisory Committee (PAC).

Schoolsite Council (SSC) is our school-level group of parents, teachers, students, and administrators who work together to develop and monitor Excel Academy's continuous growth and improvement. The specific areas of monitoring includes, but is not limited to:

1. School budget, including the LCAP
2. Curriculum/Instruction/Assessment
3. Fundraising and Grants
4. School Program Development

Agendas are shared two weeks in advance. All stakeholders are invited to attend and offered the opportunity to make comments at the meeting. This committee is scheduled to meet at least four times each year. Please contact tmurphy@excelacademy.education with any questions.

The English Learner Advisory Committee (ELAC) is a committee for parents or other community members who want to advocate for English Learners. School Information and opportunities for English Learner support and participation are shared during the meeting. This committee is scheduled to meet at least four times each year. Please contact jcraig@excelacademy.education with any questions.

The Parent Advisory Committee (PAC) is a group of parents from the Excel Academy community who meets twice per year to address and recommend changes to the Excel Academy administration regarding specific areas of school operations in order to help the school attain its goal of providing each child with the best education possible. Excel Academy believes that active parent, student, and employee participation in school operations will help foster the sustainability of our school. The PAC will play an important role in making Excel Academy even more responsive to staff, student, and parent needs, and provide for continual improvement, ensuring that Excel Academy staff practice open and positive communication with families. To that end, we welcome any inquiries into parent participation in the committee. Please reach out to amun@excelacademy.education to inquire how to become involved.

Excel Academy provides several opportunities throughout the school year to seek stakeholder feedback through surveys. In addition, we have our Family Needs Request & Feedback Form available on our website.

Describe opportunities for parents to become involved at the school (such as School Site Council, Parent Teacher Association, classroom volunteering). Include efforts the school makes to seek parent input in making decisions for the school.

6. School Safety Plan

Report information from the current 2020-21 school year

School safety plan review date: (The Education Code requires that this be done by March 1 each year)	Month: August	For the 2020–21 school year, this date should be between July 1, 2020 and March 1, 2021.
	Year: 2020	
School safety plan:	<p>The school safety plan was last reviewed and updated with staff in August of 2020. The safety plan may be viewed on request.</p> <p>The school safety plan ensures emergency preparedness at learning period meetings, test sites, field trips, staff meetings, and at the school office. It also encompasses required trainings and school expectations in regards to a mandated reporter, sexual harassment, bloodborne pathogens, and active shooters. The expectations of conduct for students, parents, guardians, and staff, bullying, and hate crime reporting are also included.</p>	Describe your school safety plan, including its status and key elements (such as monthly safety drills, crisis intervention plans, safety supervision, and suspension and expulsion policy).

7. School Facility Information

Report information from the current 2020–21 school year

School facilities, conditions, improvements and safety:	Excel Academy Charter School is virtual; therefore, the administrative office is the only facility.	Describe the condition of the school using the questions below as a guide. <ul style="list-style-type: none"> • When was the school built? How many classrooms and portables are there? • What features does the school have (computer lab, library, gymnasium, athletic fields, etc.)? • What is the general condition of the school, and is it cleaned on a regular basis? Include the size of the janitorial staff and the process for handling repairs. • Are there sufficient classroom, playground and staff spaces to support teaching and learning? • How does the maintenance crew ensure that the school is safe, clean and in good repair? • Describe how students are kept safe on school grounds before, during and after school. • Describe any planned or recently completed facility improvement projects, deferred maintenance projects, modernization projects or new school construction
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		projects, if applicable. Also include how the improvements were funded.
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8. Textbooks and Instructional Materials

8a. Quality of Textbooks and Instructional Materials

Report information from the current 2020–21 school year			
	Yes	No	Mark each question yes or no.
Are the textbooks adopted from the most recent state-approved or local governing-board-approved list?	X		
Are the textbooks consistent with the content and cycles of the curriculum frameworks adopted by the State Board of Education?	X		
Does every student, including English learners, have access to their own textbooks and instructional materials to use in class and to take home?	X		
Explanation (if needed; see instructions in sidebar):			If you answered no to any of the questions above, please provide a brief explanation.

8b. Quality, Currency, and Availability of Textbooks and Instructional Materials

Report information from the current 2020–21 school year		
Quality, currency, and availability of textbooks and instructional materials:	<p>Excel Academy offers a tuition-free independent study personalized learning model for students in grades TK–12. Our school allows parents, in collaboration with their ToR, to select from a variety of educational resources and materials from approved community providers using instructional funds provided by the charter school. Using these educational resources, families create a customized learning experience for their children in partnership with a highly qualified, California-credentialed teacher.</p> <p>Excel Academy has an administrative team that examines the curriculum choices allowed by the school each year, with an emphasis on ensuring all curricula meet the California Content Standards for each subject. Additionally, ToRs act as a highly qualified partner to the parent, ensuring each student's specific needs are met and acting as the final decision maker for the student's curricula.</p>	<p>Briefly describe the selection process for your textbooks and instructional materials using the questions below as a guide.</p> <ul style="list-style-type: none"> How is the textbook-selection committee comprised? Who makes the final decision on the chosen textbooks? Were the most recently adopted textbooks chosen using the state-approved or local governing-board-approved list? Does the textbook content fit within the curriculum framework adopted by the State Board of Education?

8c. Textbooks and Instructional Materials Availability

Report information from the current 2020-21 school year			
Core Curriculum Areas	Percentage of Students Who Lack Their Own Assigned Textbooks and Instructional Materials	Provide the percentage of students who lack their own assigned textbooks and instructional materials at the school.	
Reading/language arts	0%	<p>The sufficiency requirement for the core areas of reading/language arts (including the English language development component of an adopted program), mathematics, science and history/social science applies to all students, including English learners.</p> <p>However, the sufficiency requirement for foreign language, health, science lab equipment, and visual and performing arts applies only to students enrolled in those courses.</p> <ul style="list-style-type: none"> If a curriculum area does not apply to your school, please put "N/A" in the percentage column. Blank fields will be taken as zero percent lacking. 	
Mathematics	0%		
Science	0%		
History/social science	0%		
Visual and performing arts	0%		
Foreign language	0%		
Health	0%		
Science laboratory equipment (grades 9-12 only)	0%		
Explanation (if needed):			If any insufficiency exists, please explain.

9. Suspensions and Expulsions

Report information from the 2019-20 school year		
<p>Cumulative enrollment: The total number of unique or unduplicated primary, secondary and short-term enrollments within the academic year (from July 1 to June 30), regardless of whether the student is enrolled multiple times within a school or district. Cumulative enrollment counts are calculated separately at the school, district and state levels for the purpose of generating suspension, expulsion and truancy rate reports at these levels. For example, a student who is enrolled in two schools within the same district during the academic year will be counted in each of the school's cumulative enrollment, but only once in the district's cumulative enrollment count.</p> <p><i>Note: The source of the suspension and expulsion data is the certified End-of-Year 3 Student Discipline data collection in CALPADS. The data is usually released in December or January from the state.</i></p>		
<p>NOTE: Report suspension and expulsion data only from July 2019 through February 2020 due to the COVID-19 pandemic.</p>		
	2019-20	Please provide the unduplicated count of students involved in one or more incidents during the academic year that were subsequently suspended or expelled from school. Students who were suspended multiple times or expelled are counted
Suspensions:	0%	

Expulsions:	0%	only once in the report totals. All students suspended (including in-house suspensions) should be counted.
Cumulative enrollment:	425	

10. Teacher Credentials

Report data from the current 2020-21 school year

- **Teachers with a full credential:** Teachers with a full credential include teachers who have completed a teacher preparation program and hold a preliminary, clear professional or life credential.
- **Teachers without a full credential:** Teachers without a full credential include teachers with district and university internships, pre-internships, emergency or other permits, and waivers.
- **Teachers teaching outside subject area:** Teachers who are fully credentialed but teaching outside of their subject area of competence.

Teacher Credential Information	2018-19	2019-20	2020-21	Provide three-year data for the number of teachers with a full credential, without a full credential and the number of teachers teaching outside their subject area (with a full credential).
Teachers with a full credential	N/A	43	43	
Teachers without a full credential	N/A	0	0	
Teachers teaching outside subject area (with a full credential)	N/A	0	0	

11. Teacher Qualifications

Report data from the current 2020-21 school year

- **Teacher misassignments of English learners:** Teachers assigned to English learners (EL) who do not have proper certification to teach EL courses.
- **Total teacher misassignments:** The placement of a certificated employee in a teaching or services position for which the employee does not hold a legally recognized certificate, credential, permit or waiver with an appropriate authorization for the assignment or is not authorized for the assignment under another section of the law (this total should include the teacher misassignments of English learners).
- **Vacant teacher position:** A position to which a single designated certificated employee has not been assigned at the beginning of the year for a full year or entire semester. ("Beginning of the year" or "semester" means the first day classes necessary to serve all the students enrolled are established with a single designated certificated employee assigned for the duration of the class, but not later than 20 working days after the first day students attend classes for that semester.)

Teacher Misassignments and Vacant Teacher Positions	2018-19	2019-20	2020-21	Provide the data for the number of teacher misassignments of English learners, the total number of teacher misassignments and the number of vacant teacher positions for the school years listed.
Teacher misassignments of English learners	N/A	0	1	
Total teacher misassignments	N/A	0	0	
Vacant teacher positions	N/A	0	0	

12. Professional Development

Report information from the current 2020-21 school year

Professional development days:	2018-19	2019-20	2020-21	Provide the number of school days for each year (regardless of being full-days or partial-days*).
	N/A	5	8	

**For the purposes of the SARC, a partial-day is defined as less than a full school day. Each school will determine what is a full school day based on its schedule. For purposes of the SARC, a school day is defined as a day upon which the school is in session, including non-holiday weekdays, within the period of time beginning on July 1 of one calendar year and ending on June 30 of the following calendar year, including during summer school session.*

<p>Professional development training:</p>	<p>2020- 2021</p> <p>Excel Academy teachers and staff are provided with professional development training multiple times throughout the year. These trainings include technical training, departmental updates, and special program workshops. All topics were selected by a combination of staff surveys and departmental needs. Surveys are sent to all staff before and after each training, requesting staff to input the areas they would like most training in, as well as assessing the effectiveness of the training they received, how they were delivered, and how they could be improved. All these factors are taken into consideration when developing the agendas. Our topics for 2020-21 for staff include:</p> <p>Keenan SafeSchools online training courses COVID-19 Safe Reopening Presentation Technology Presentation At-Promise Student Intervention Presentation ELD Student Intervention Presentation Homeless & Foster Youth Awareness Presentation Social Emotional Student Support Tips and Tricks Presentation Staff Mental Wellness Presentation Goal Setting - Building Self-Efficacy for Students Assessment, Intervention, and SPED Support Compliance Update High School Updates - College and Career Readiness</p> <p>ToRs are continually supported during the school year to provide support and ensure implementation of professional learnings through individual Zoom or phone conferences for mentoring. In addition, follow up videos for support are provided to all ToRs.</p> <p>Additionally, all departments created goals that were essentially aligned to the school goals which ultimately drove each staff member's individual goals. Evaluations are held during the year to stay up-to-date on each individual staff member's goals and areas of growth. All admin. and department leads are given the opportunity to attend 2-3 conferences and/or workshops throughout the year to increase their proficiency and develop their individual departmental goals.</p> <p>2019-2020</p> <p>For the 2019-20 school year, Excel provided a two-day tech training for all ToRs, which included sessions on G-Suite organization, School Pathways usage, and Team Drive training. Additionally, our all staff PD in August included a guest speaker in order to cast vision and set goals for our staff in conjunction with Excel Academy's theme for the 2019-20 school year: Growth Mindset. The topics for</p>	<p>Briefly describe how teachers and staff are trained for continuous instructional improvement using the questions below as a guide.</p> <ul style="list-style-type: none"> • What are the major areas of focus of staff development, and, specifically, how were they selected? • What methods are used to deliver professional development (after-school workshops, conferences, individual mentoring)? • How are teachers supported during implementation (through in-class coaching, teacher-principal meetings, student-performance data reporting)?
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	<p>each session of this PD all contributed to this theme to push our staff towards this goal in every aspect of their work. All topics were selected by a combination of staff surveys and departmental needs. Surveys were sent to all staff before and after each PD and training, requesting staff to input the areas they would like most training in, as well as assessing the effectiveness of the training they received, how they were delivered, and how they could be improved. All these factors were taken into consideration when developing the agendas for each training and PD. Teachers had the ability to meet with each department in small group settings at our September training to get assistance and feedback on specific areas of need.</p> <p>All admin. and department leads were given the opportunity to attend 2-3 conferences and/or workshops throughout the year to increase their proficiency and develop their individual departmental goals. Each of these admin. members and leads work in conjunction with the staff development coordinator to select the best and most useful workshops and conferences to attend. SMART goal evaluations were held between staff and their supervisors throughout the year to stay up-to-date on each individual staff member's goals and areas of growth.</p>	
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13. Ratio of Pupils to Academic Counselor

Report information from the 2019-20 school year		
	Ratio	
Pupils to counselors	425 to 1 FTE	Provide the ratio of pupils to academic counselors who are assigned to the school.

14. School Support Staff

Report information from the 2019-20 school year		
School Support Staff	FTE (Full-Time Equivalent)	
Counselor (academic, social/behavioral or career development)	1	<p>Provide, in units of full-time equivalents (FTE), the number school support staff who are assigned to the school.</p> <p>One FTE equals one staff member working full-time; one FTE could also represent two staff members who each work 50 percent of full-time.</p> <p>If a position is held by a district employee and is shared by more than one school, please report his or her FTE for the school (e.g., one nurse shared for three schools equally could be 0.33 FTE).</p>
Library media teacher (librarian)	0	
Library media services staff (paraprofessional)	0	
Psychologist	1	
Social worker	0	
Nurse	0	
Speech/language/hearing specialist	0	
Resource specialist (nonteaching)	0	

15. Types of Services Funded

Report information from the 2019–20 school year

<p>Types of services funded:</p>	<p>Title I Intervention services are provided to all at-promise students. These students receive evidence-based interventions and are closely monitored for progress. Our high school counselors are available to support the growing mental, social, and emotional needs of our students. Career and Technical Education courses are available for students who wish to pursue a specific pathway.</p>	<p>Provide specific information about the types of programs and services available at the school that support and assist students (such as Agricultural Career Technical Education, Class Size Reduction, Economic Impact Aid, Gifted and Talented Education pupils, Rural Education Achievement, Title I, etc.).</p>
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16. Career Technical Education

16a. Career Technical Education Programs

Report information from the 2019–20 school year

<p>CTE programs:</p>	<p>Primary Representative - Lorrie Wood - High School Coordinator/English HQT</p> <p>Sequence: Education, Child Development & Family Services “Child Development” Pathway Marketing Sales & Service “Marketing” Pathway:</p> <p>Courses: 7510: Intermediate Child Development Concentrator 8310: Intermediate Marketing Concentrator</p> <p>The CTE courses serve as elective courses. They are not integrated into core courses. They help fulfill graduation requirements. EACS offers a range of CTE course options via online curriculum providers. Additionally, live, weekly instruction from a credentialed CTE instructor in their specific pathway is open to all students. Accommodations are made to ensure that the needs unique to defined special populations of students are met.</p> <p>Measurable outcomes for 7510: Intermediate Child Development Concentrator - As a result of this study of psychology, students will demonstrate the ability to: Understand the nature of human beings, both as individuals and as members of social groups. Appreciate psychology and theories, both as an academic discipline and as a body of knowledge relevant to the student’s life and culture. Apply critical thinking skills and be aware of the need for careful, objective evaluation of psychological ideas. Employ the various methods of psychological inquiry. Recognize and apply psychological principles to everyday situations including high ethical standards.</p>	<p>Provide information about the programs and classes offered at the school that are specifically focused on career preparation and/or preparation for work using the items below as a guide:</p> <ul style="list-style-type: none"> • Provide a list of Career Technical Education (CTE) programs and sequences offered at the schools by the district that are aligned to the applicable model curriculum standards. • Provide a list of courses conducted by the regional occupational center or program. • List the primary representative of the district’s career technical advisory committee and the industries represented. • How are these programs and classes integrated with academic courses, and how do they support academic achievement? • How does the school address the needs of all students in career preparation and/or preparation for work, including the needs unique to defined special populations of students? <p>What are the measurable outcomes of these programs and classes, and how are they</p>
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	<p>Explain why knowledge of psychology is important to teach effectively; discuss, compare, and contrast the foundations of constructivist and behavioral psychology;</p> <p>Discuss, compare, and contrast constructivist and behaviorist models of teaching and learning;</p> <p>Identify and discuss two types of behavioral conditioning, and how each type can be used in the teaching/learning process;</p> <p>Identify the key elements of psychological and social constructivism; and identify the cognitive skill levels of Bloom's Taxonomy, and discuss how teachers can apply the taxonomy to the constructivist model of teaching and learning.</p> <p>Identify points of physical development that might be important for teachers of certain age levels;</p> <p>Identify and discuss a variety of psychologists and leading professionals in the field</p> <p>Discuss research and examples of bullies and psychopathic children and their impact in the educational setting.</p> <p>Identify and discuss diversity based on individual and group differences, such as differences in learning styles and preferences, intelligences and sensitivities, cultures and ethnicities, and gender.</p> <p>Identify and discuss diversity based on ability and disability, including the history of accommodating special needs students; the perspectives and strategies for accommodating special needs, such as IEPs and alternative assessment; and the categories of disabilities: learning, cognitive, sensory, behavioral, and physical</p> <p>Identify and discuss at least four perspectives or theories of motivation, including their implications for teaching and learning; discuss the Expectancy x Value model of motivation and give examples of how it can be applied in a classroom; and identify and discuss at least five proven management strategies that enhance learning, encourage participation, and promote a caring classroom atmosphere while preventing misbehavior.</p> <p>Methods of instruction:</p> <ul style="list-style-type: none"> Direct instruction Group and individual applied projects Multimedia Demonstration Field trips Guest speakers <p>Evaluation methods:</p> <ul style="list-style-type: none"> Student projects Written work Exams Observation record of student performance Completion of assignment <p>Measurable outcomes for 8310: Intermediate Marketing Concentrator - As a result of this study, students will demonstrate the ability to:</p>	<p>evaluated for effectiveness in attaining those outcomes?</p>
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Relate philosophy, purpose and goals of CTE.

Explain the importance of meeting the demands of the 21st century workplace.

Explain the “Drivers of Change” and how it relates to college and career. Discuss health and safety policies, procedures, regulations, practices and exhibit the proper use of equipment and handling of hazardous materials.

Explain the reasoning of basic safety rules in the classroom and workplace. Demonstrate an understanding of safety rules and practices by passing an assessment, with 90% accuracy. Apply appropriate technical skills and academic knowledge.

Analyze and apply appropriate academic standards required for successful industry sector pathway completion leading to postsecondary education and employment. Refer to the industry sector alignment matrix for identification of standards. Communicate clearly, effectively, and with reason.

Explain how a positive attitude can help in becoming an effective communicator.

Practice good communication to help build positive relationships in the classroom and at the workplace. Compare and contrast written and oral communications.

Describe the importance of email etiquette as it relates to effective communication.

Assess how nonverbal communication affects messages.

Explain the impact of personal and professional social media in communication.

Describe issues related to communicating in a global society.

Explain the appropriate etiquette for answering telephone calls and leaving voicemail messages; receiving and making requests; giving directions and persuading others.

Identify the steps to plan a successful oral presentation.

Develop an education and career plan aligned with personal goals.

Integrate multiple sources of information presented in diverse formats and media (e.g., visually, quantitatively, orally) in order to make informed decisions and solve problems, evaluating the credibility and accuracy of each source and noting any discrepancies among the data.

Apply the decision-making process to develop a college and career plan.

Identify employability skills required for participation in the world of work.

Assess interests, skills and aptitudes and match these to career options.

Identify further education and/or training needed for career choices.

Develop a resume, cover letter and other resources for the job search process.

Complete a job application.

Identify what employers are looking for when hiring employees.

Apply effective interviewing skills and write a thank-you note.

Act as a responsible citizen in the workplace and the community.

Explain what the school, workplace and community expects of a student as a member of society.

Identify personality and behavior characteristics that have a positive or negative impact at school, in the workplace, and in the community.

Identify areas in which sensitivity is required in a diverse workplace.

Model integrity, ethical leadership, and effective management.

Respond thoughtfully to diverse perspectives; synthesize comments, claims, and evidence made on all sides of an issue; resolve contradictions when possible; and determine what additional information or research is required to deepen the investigation or complete the work.

Define integrity and how it relates to the classroom and workplace.

Work productively in teams while integrating cultural and global competence.

Define human relations.

Explain the need for effective human relations skills at school and in the workplace.

Contrast the characteristics and consequences of positive and negative attitudes.

Recognize the contributions of diversity in society and in the workplace.

Assess the value of teamwork in the classroom and workplace.

Identify strategies that can be used to promote good working relationships within the classroom and in the workplace.

Explain the importance of networking.

Identify verbal, non-verbal, and physical types of harassment as defined by the state/federal law and determine appropriate behavior in the workplace.

Demonstrate creativity and innovation.

Identify how new ideas, thinking, tasks, solutions, and methods can be fostered in the workplace.

Explain the appropriate and constructive expression of creativity and innovation at school and in a workplace situation.

Employ valid and reliable research strategies.

Identify strategies for conducting basic research.

Analyze the characteristics of successful entrepreneurs.

Understand the role of government in the free enterprise system and its impact on small businesses.

Understand the relationship between supply and demand and pricing and production.

Understand the different types of business ownership and the advantages and disadvantages of owning and managing a small business.

Know the elements of effective human resources management and how these practices benefit small businesses.

Understand the reasons a small business develops a business plan.

Understand how products and services are conceived, developed, maintained, and improved in response to market opportunities.

Understand how market research is used to develop strategies for marketing products or services in a small business.

Analyze market research to develop a marketing plan.

Conduct market research by using a variety of methods.

Develop a financial plan that outlines sources of capital and projects income and expenses.

Analyze a proposed business situation and its potential market.

Solve problems that involve discounts, markups, commissions,

Understand how market research is used to develop strategies for marketing products or services in a small business.

Understand how products and services are conceived, developed, maintained, and improved in response to market opportunities.

Understand the financial concepts used in making marketing decisions.

Formulate pricing strategies for goods and services for a small business.

Understand the relationship between supply and demand and pricing and production.

Understand the role of personal integrity and ethical behavior in the workplace.

Understand the importance of accountability and responsibility in fulfilling personal, community, and workplace roles.

Methods of instruction:

Direct instruction

Group and individual applied projects

Multimedia Demonstration

Guest speakers

Evaluation methods:

Student projects

Written work

Exams

Observation record of student performance

Completion of assignment

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16b. Career Technical Education Participation

<i>Report information from the 2019-20 school year</i>		
Number of pupils participating in a CTE program	8 students	Provide participation data regarding the Career Technical Education program at the school.
Percentage of pupils who completed a CTE program and earn a high school diploma	0 students	
Percentage of CTE courses that are sequenced or articulated between a school and institutions of postsecondary education.	0 students	

17. Class Size Distribution

<i>Report information from the 2019-20 school year</i>		
Class size:	24	Please review and update if necessary.

*Please review your questionnaire and make sure all sections have been completed.
Be sure to save a copy for your records and email us the questionnaire as an attachment.*

Thank you for completing your SARC questionnaire!

2019-20 SARC Questionnaire

School Accountability Report Card

Due Date: Friday, December 18, 2020

Excel Academy Charter School

Table of Contents

1. General Information
2. School Logo
3. Mission Statement
4. Executive Director's Message
5. Parental Involvement
6. School Safety Plan
7. School Facility Information
8. Textbooks and Instructional Materials
9. Suspensions and Expulsions
10. Teacher Credentials
11. Teacher Qualifications
12. Professional Development
13. Ratio of Pupils to Academic Counselor
14. School Support Staff
15. Types of Services Funded
16. Career Technical Education
17. Class Size Distribution

Instructions

Use the Navigation Pane as a guide to filling out your questionnaire. Please answer each section completely.

- For all possible sections, we inserted the text from your 2018-19 SARC for your reference. Save some time now by reviewing each section and updating them as necessary.
- While most sections require the *past* 2019-20 school year data and text information, you will notice some sections require *current* 2020-21 school year data and text information.
- Please refer to the title and right-hand sidebar notes of each section for helpful information, and be sure to address all bullet points in the column to ensure SARC compliance.
- All sections listed are required in your SARC (unless otherwise noted). Red text in narrative sections indicates information that must be updated. The light-yellow fields require new data or info each year.

Due Date

To ensure enough time to create your SARC, submit it for review, make edits and finalize before the February state deadline, please complete your questionnaire by **Friday, November 13, 2020**.

Custom Photos

Personalize your SARC with custom photos! Just email us the pictures as attachments in a JPEG format. Examples include mascots, students (with parental consent), field trips, award ceremonies, sporting events, campus and teachers.

Contact us

Contact your SARC coordinator at any time with questions about completing this questionnaire. Your SARC coordinator Caitlin may be reached at (916) 669-5136 or by email through our team inbox at sarcproduction@sia-us.com.

Note

Please keep in mind that the California Department of Education may add or amend its reporting requirements before the deadline, so we will contact you to collect additional information if necessary.

1. General Information

Report information from the current 2020-21 school year		
District name:	Independent charter authorized by Warner ESD	Provide the general information at left, and verify that the information is current. Note: Use the most current information available. If the principal for the 2019-20 school year has since changed, we suggest listing the current principal name on the SARC.
School name:	Excel Academy Charter School	
School address:	1 Technology Drive, Ste I-811 Irvine, CA 92618	
School phone number:	(949) 387-7822	
School grade levels:	TK-12	
Website:	www.excelacademy.education	
County-District-School (CDS) code:	36-67736-0139576	
Name of Executive Director:	Heidi Gasca	
Email address of Executive Director:	hgasca@excelacademy.education	

2. School Logo

Report information from the current 2020-21 school year		
(Optional)		Please provide the school logo or mascot here in a .jpeg or .gif format. You may also attach it to your email when you submit your questionnaire.

3. Mission Statement

Report information from the current 2020-21 school year		
School mission statement: (Required)	Excel Academy will provide flexible, personalized learning through a customized course of study that will educate, motivate, and instill a love of learning in each individual student. Teachers and parents will join together to maintain high expectations and promote academic excellence for all students, creating the next generation of leaders.	Please provide the school mission statement. <i>A mission statement is a public declaration that schools use to describe their founding purpose and</i>

		<i>major organizational commitments (what they do and why they do it).</i>
School Vision Statement: (Optional)	<p>Life is what you create ... at Excel Academy we bring students to LIFE through:</p> <p>LEARNING: The primary goal of Excel Academy is that each student continues to grow in knowledge, ability and social/emotional intelligence. Students are encouraged to work any time, any place and are supported by teachers, curriculum and staff that will adapt to the uniqueness inherent in every student and learning situation. Excel Academy pursues a learning environment where every student will be challenged by, enjoy, and help direct their own education.</p> <p>INDEPENDENCE: Excel Academy believes one of the key elements of an optimal education is to place the student in a climate where curiosity and exploration are rewarded. While Excel Academy's curriculum aligns itself to California's academic content standards, each family may avail themselves of alternative or supplemental learning resources that can help prepare each student for the real-life complexities of higher education and the ever-changing job market.</p> <p>FLEXIBILITY: Flexible pacing enables each student, under the guidance of the Teacher of Record, to target individual needs without the demands of a classroom. By developing an awareness of their own unique learning style and advancement in their communication abilities, students and families will be enabled to discover their greatest areas of need and direct their efforts accordingly.</p> <p>EMPOWERMENT: Excel Academy strives to empower students to take ownership of their education and develop not only the appropriate knowledge, skills, and abilities, but also the confidence, creativity, and discipline to help them adapt to the challenges and opportunities of the 21st century.</p>	<p>School vision statement is optional.</p> <p><i>A vision statement, or simply a vision, is a public declaration that schools use to describe their high-level goals for the future—what they hope to achieve if they successfully fulfill their mission.</i></p>
School Motto: (Optional)		<p>School motto is optional.</p> <p><i>A school motto is a sentence, phrase, or word expressing the spirit or purpose of your school.</i></p>
Governing Board: (Optional)	<p>Board of Education</p> <p>William Hall, President</p> <p>Michael Humphrey, Vice President</p> <p>Susan Houle, Clerk</p> <p>Steve Fraire, Member</p> <p>Larry Alvarado, Member</p>	<p>Governing Board is optional.</p>
Other: (Optional)	<p style="text-align: center;"><u>School Goals</u></p> <p>1. <u>Sustainable Growth:</u> Sustainable growth through strategic planning, marketing and optimizing resources in relationship to our budget.</p> <p>2. <u>Retention:</u> Sustainably retaining students through high academic expectations, intervention, integrity, innovation and collaboration.</p> <p>3. <u>Quality Programs:</u> Offer innovative personalized programs that offer flexibility, leadership, and independent learning. Develop and empower individual teams to deliver programs of integrity, accountability, and compliance.</p> <p>4. <u>Parent & Student Service:</u> Serving parents and students with integrity and respect to the highest possible standard developed through intuitive solutions understanding educational needs.</p> <p>5. <u>Collaborative Partnerships:</u> Creating and facilitating partnerships within internal departments with community providers, other NCB schools, professional associations membership associations, and authorizing districts</p>	<p>Provide additional optional information such as:</p> <ul style="list-style-type: none"> ● Quotes ● History ● School Leadership, etc.

	<p>6. <u>Accountability and Compliance</u>: Define direction that creates and shapes policies and procedures, clarifies deadlines, roles and responsibilities, and accountability to maintain streamlined processes. Develop benchmark goals and identify implementation initiatives to improve California state dashboard ratings in all areas.</p> <p>7. <u>Professional Development</u>: Growing, enhancing, and developing skills in our staff. Defining and demonstrating roles and responsibilities, identifying strengths and weaknesses, providing methods of support including training and access to materials to enhance performance.</p>	
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4. Executive Director’s Message

<i>Report information from the previous 2019–20 school year to present</i>		
Executive Director’s message:	<p>Excel Academy Charter School (EACS) offers a tuition-free independent study personalized learning model for students in grades TK–12. Our high-quality model of education is rooted in flexible learning, personalized pacing schedules, and proven systems of support. In collaboration with the credentialed Teacher of Record (ToR), parents select from a variety of educational resources, services, and materials. Using these educational resources, families build a customized learning experience for their students, tailored to fit their academic, emotional, and social needs. Every student enrolled in EACS benefits from the expertise, guidance, and oversight of a ToR. Our credentialed ToRs work with their assigned students to identify and implement a personalized learning plan for each student. ToRs and students meet face to face and via a variety of platforms throughout the monthly learning periods to ensure students’ unique needs are met, and the students are showing academic growth and progress through grade level and state standards.</p> <p>Excel Academy’s goals for the 2019–20 school year were to hire and retain multiple subject and single subject certificated TK–12 teachers to support our wide geographic region. EACS identified and provided curriculum that was aligned to the Common Core State Standards (CCSS), as well as implemented training and supplied resources to all students, parents, and teachers on the CCSS.</p> <p>During the 2020–21 school year, EACS will continue to involve all stakeholders in decision-making at the school level through participation in the Scholastic Council (SSC), English Learner Advisory Council (ELAC), Parent Advisory Council (PAC), and streamlined daily, weekly, and monthly communication. The focus on the connections between stakeholders and EACS is to foster investment in education and provide meaningful transparent communication. EACS will continue to gather baseline data from internal assessments and the upcoming California Assessment of Student Performance and Progress (CAASPP) results, and will work to meet or exceed student performance data in both English language arts (ELA) and math by 2% each year. EACS will establish baseline data of college and career readiness at the conclusion of the 2020–21 school year and will strive to increase 2% annually in the number of students that are college and career ready. EACS will maintain a high rate of average daily attendance (ADA) at 95% or higher or increase ADA by 2% each school year until reaching 95% or above, and will maintain less than a 1% suspension and expulsion rate. EACS will show an overall positive rating of 90% or higher in school safety and connectedness in the following surveys: Local Control and Accountability Plan (LCAP) Parent Survey, LCAP Teacher Survey, LCAP Student Survey, Teacher End of the Year Survey, and Parent End of the Year Survey. EACS aims for students to complete all standards in ELA, math, science, social studies, visual and performing arts, physical education, health and world languages, while working to be creative and complex thinkers, effective communicators, community and global participants, and empowered, independent learners.</p>	<p>This section appears on the front page of the SARC. Please include your most important points, such as your school’s:</p> <ul style="list-style-type: none"> Learning and teaching philosophy Awards and recognitions Accomplishments from the past 2019–20 school year Goals for the current 2020–21 school year <p>What makes your school special and unique? Use this section as a marketing piece and selling point to increase average daily attendance.</p>

5. Parental Involvement

Report information from the current 2020-21 school year		
Parental involvement opportunities and contact information:	<p>Excel Academy offers several opportunities for parental involvement through the Schoolsite Council (SSC), English Learner Advisory Committee (ELAC), and Parent Advisory Committee (PAC).</p> <p>Schoolsite Council (SSC) is our school-level group of parents, teachers, students, and administrators who work together to develop and monitor Excel Academy's continuous growth and improvement. The specific areas of monitoring includes, but is not limited to:</p> <ol style="list-style-type: none"> 1. School budget, including the LCAP 2. Curriculum/Instruction/Assessment 3. Fundraising and Grants 4. School Program Development <p>Agendas are shared two weeks in advance. All stakeholders are invited to attend and offered the opportunity to make comments at the meeting. This committee is scheduled to meet at least four times each year. Please contact tmurphy@excelacademy.education with any questions.</p> <p>The English Learner Advisory Committee (ELAC) is a committee for parents or other community members who want to advocate for English Learners. School Information and opportunities for English Learner support and participation are shared during the meeting. This committee is scheduled to meet at least four times each year. Please contact jcraig@excelacademy.education with any questions.</p> <p>The Parent Advisory Committee (PAC) is a group of parents from the Excel Academy community who meets twice per year to address and recommend changes to the Excel Academy administration regarding specific areas of school operations in order to help the school attain its goal of providing each child with the best education possible. Excel Academy believes that active parent, student, and employee participation in school operations will help foster the sustainability of our school. The PAC will play an important role in making Excel Academy even more responsive to staff, student, and parent needs, and provide for continual improvement, ensuring that Excel Academy staff practice open and positive communication with families. To that end, we welcome any inquiries into parent participation in the committee. Please reach out to amun@excelacademy.education to inquire how to become involved.</p> <p>Excel Academy provides several opportunities throughout the school year to seek stakeholder feedback through surveys. In addition, we have our Family Needs Request & Feedback Form available on our website.</p>	<p>Describe opportunities for parents to become involved at the school (such as School Site Council, Parent Teacher Association, classroom volunteering). Include efforts the school makes to seek parent input in making decisions for the school.</p>

6. School Safety Plan

Report information from the current 2020-21 school year						
School safety plan review date: (The Education Code requires that this be done by March 1 each year)	<table border="1"> <tr> <td style="background-color: #e0e0e0;">Month:</td> <td>August</td> </tr> <tr> <td style="background-color: #e0e0e0;">Year:</td> <td>2020</td> </tr> </table>	Month:	August	Year:	2020	<p>For the 2020-21 school year, this date should be between July 1, 2020 and March 1, 2021.</p>
Month:	August					
Year:	2020					

<p>School safety plan:</p>	<p>The school safety plan was last reviewed and updated with staff in August of 2020. The safety plan may be viewed on request.</p> <p>The school safety plan ensures emergency preparedness at learning period meetings, test sites, field trips, staff meetings, and at the school office. It also encompasses required trainings and school expectations in regards to a mandated reporter, sexual harassment, bloodborne pathogens, and active shooters. The expectations of conduct for students, parents, guardians, and staff, bullying, and hate crime reporting are also included.</p>	<p>Describe your school safety plan, including its status and key elements (such as monthly safety drills, crisis intervention plans, safety supervision, and suspension and expulsion policy).</p>
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7. School Facility Information

<p><i>Report information from the current 2020-21 school year</i></p>		
<p>School facilities, conditions, improvements and safety:</p>	<p>Excel Academy Charter School is virtual; therefore, the administrative office is the only facility.</p>	<p>Describe the condition of the school using the questions below as a guide.</p> <ul style="list-style-type: none"> • When was the school built? How many classrooms and portables are there? • What features does the school have (computer lab, library, gymnasium, athletic fields, etc.)? • What is the general condition of the school, and is it cleaned on a regular basis? Include the size of the janitorial staff and the process for handling repairs. • Are there sufficient classroom, playground and staff spaces to support teaching and learning? • How does the maintenance crew ensure that the school is safe, clean and in good repair? • Describe how students are kept safe on school grounds before, during and after school. • Describe any planned or recently completed facility improvement projects, deferred maintenance projects, modernization projects or new school construction projects, if applicable. Also include how the improvements were funded.

8. Textbooks and Instructional Materials

8a. Quality of Textbooks and Instructional Materials

<i>Report information from the current 2020-21 school year</i>			
	Yes	No	Mark each question yes or no.
Are the textbooks adopted from the most recent state-approved or local governing-board-approved list?	X		
Are the textbooks consistent with the content and cycles of the curriculum frameworks adopted by the State Board of Education?	X		
Does every student, including English learners, have access to their own textbooks and instructional materials to use in class and to take home?	X		
Explanation (if needed; see instructions in sidebar):			If you answered no to any of the questions above, please provide a brief explanation.

8b. Quality, Currency, and Availability of Textbooks and Instructional Materials

<i>Report information from the current 2020-21 school year</i>		
Quality, currency, and availability of textbooks and instructional materials:	<p>Excel Academy offers a tuition-free independent study personalized learning model for students in grades TK-12. Our school allows parents, in collaboration with their ToR, to select from a variety of educational resources and materials from approved community providers using instructional funds provided by the charter school. Using these educational resources, families create a customized learning experience for their children in partnership with a highly qualified, California-credentialed teacher.</p> <p>Excel Academy has an administrative team that examines the curriculum choices allowed by the school each year, with an emphasis on ensuring all curricula meet the California Content Standards for each subject. Additionally, ToRs act as a highly qualified partner to the parent, ensuring each student's specific needs are met and acting as the final decision maker for the student's curricula.</p>	<p>Briefly describe the selection process for your textbooks and instructional materials using the questions below as a guide.</p> <ul style="list-style-type: none"> • How is the textbook-selection committee comprised? Who makes the final decision on the chosen textbooks? • Were the most recently adopted textbooks chosen using the state-approved or local governing-board-approved list? • Does the textbook content fit within the curriculum framework adopted by the State Board of Education?

8c. Textbooks and Instructional Materials Availability

<i>Report information from the current 2020-21 school year</i>		
Core Curriculum Areas	Percentage of Students Who Lack Their Own Assigned Textbooks and Instructional Materials	Provide the percentage of students who lack their own assigned textbooks and instructional materials at the school.

Reading/language arts	0%	<p>The sufficiency requirement for the core areas of reading/language arts (including the English language development component of an adopted program), mathematics, science and history/social science applies to all students, including English learners.</p> <p>However, the sufficiency requirement for foreign language, health, science lab equipment, and visual and performing arts applies only to students enrolled in those courses.</p> <ul style="list-style-type: none"> • If a curriculum area does not apply to your school, please put "N/A" in the percentage column. • Blank fields will be taken as zero percent lacking.
Mathematics	0%	
Science	0%	
History/social science	0%	
Visual and performing arts	0%	
Foreign language	0%	
Health	0%	
Science laboratory equipment (grades 9-12 only)	0%	
Explanation (if needed):		If any insufficiency exists, please explain.

9. Suspensions and Expulsions

Report information from the 2019-20 school year

Cumulative enrollment: The total number of unique or **unduplicated** primary, secondary and short-term enrollments within the academic year (from July 1 to June 30), regardless of whether the student is enrolled multiple times within a school or district. Cumulative enrollment counts are calculated separately at the school, district and state levels for the purpose of generating suspension, expulsion and truancy rate reports at these levels. For example, a student who is enrolled in two schools within the same district during the academic year will be counted in each of the school's cumulative enrollment, but only once in the district's cumulative enrollment count.

Note: The source of the suspension and expulsion data is the certified End-of-Year 3 Student Discipline data collection in CALPADS. The data is usually released in December or January from the state.

NOTE: Report suspension and expulsion data only from July 2019 through February 2020 due to the COVID-19 pandemic.

	2019-20	Please provide the unduplicated count of students involved in one or more incidents during the academic year that were subsequently suspended or expelled from school. Students who were suspended multiple times or expelled are counted only once in the report totals. All students suspended (including in-house suspensions) should be counted.
Suspensions:	0%	
Expulsions:	0%	
Cumulative enrollment:	1044	

10. Teacher Credentials

Report data from the current 2020-21 school year

- **Teachers with a full credential:** Teachers with a full credential include teachers who have completed a teacher preparation program and hold a preliminary, clear professional or life credential.
- **Teachers without a full credential:** Teachers without a full credential include teachers with district and university internships, pre-internships, emergency or other permits, and waivers.
- **Teachers teaching outside subject area:** Teachers who are fully credentialed but teaching outside of their subject area of competence.

Teacher Credential Information	2018-19	2019-20	2020-21	Provide three-year data for the number of teachers with a full credential, without a full credential and the number of teachers teaching outside their subject area (with a full credential).
Teachers with a full credential	N/A	43	64	
Teachers without a full credential	N/A	0	0	
Teachers teaching outside subject area (with a full credential)	N/A	0	0	

11. Teacher Qualifications

Report data from the current 2020-21 school year

- **Teacher misassignments of English learners:** Teachers assigned to English learners (EL) who do not have proper certification to teach EL courses.
- **Total teacher misassignments:** The placement of a certificated employee in a teaching or services position for which the employee does not hold a legally recognized certificate, credential, permit or waiver with an appropriate authorization for the assignment or is not authorized for the assignment under another section of the law (this total should include the teacher misassignments of English learners).
- **Vacant teacher position:** A position to which a single designated certificated employee has not been assigned at the beginning of the year for a full year or entire semester. ("Beginning of the year" or "semester" means the first day classes necessary to serve all the students enrolled are established with a single designated certificated employee assigned for the duration of the class, but not later than 20 working days after the first day students attend classes for that semester.)

Teacher Misassignments and Vacant Teacher Positions	2018-19	2019-20	2020-21	Provide the data for the number of teacher misassignments of English learners, the total number of teacher misassignments and the number of vacant teacher positions for the school years listed.
Teacher misassignments of English learners	N/A	0	1	
Total teacher misassignments	N/A	0	0	
Vacant teacher positions	N/A	0	0	

12. Professional Development

Report information from the current 2020-21 school year

Professional development days:	2018-19	2019-20	2020-21	Provide the number of school days for each year (regardless of being full-days or partial-days*).
	N/A	5	8	

*For the purposes of the SARC, a partial-day is defined as less than a full school day. Each school will determine what is a full school day based on its schedule. For purposes of the SARC, a school day is defined as a day upon which the school is in session, including non-holiday weekdays, within the period of time beginning on July 1 of one calendar year and ending on June 30 of the following calendar year, including during summer school session.

<p>Professional development training:</p>	<p>2020- 2021</p> <p>Excel Academy teachers and staff are provided with professional development training multiple times throughout the year. These trainings include technical training, departmental updates, and special program workshops. All topics were selected by a combination of staff surveys and departmental needs. Surveys are sent to all staff before and after each training, requesting staff to input the areas they would like most training in, as well as assessing the effectiveness of the training they received, how they were delivered, and how they could be improved. All these factors are taken into consideration when developing the agendas. Our topics for 2020-21 for staff include:</p> <p>Keenan SafeSchools online training courses COVID-19 Safe Reopening Presentation Technology Presentation At-Promise Student Intervention Presentation ELD Student Intervention Presentation Homeless & Foster Youth Awareness Presentation Social Emotional Student Support Tips and Tricks Presentation Staff Mental Wellness Presentation Goal Setting - Building Self-Efficacy for Students Assessment, Intervention, and SPED Support Compliance Update High School Updates - College and Career Readiness</p> <p>ToRs are continually supported during the school year to provide support and ensure implementation of professional learnings through individual Zoom or phone conferences for mentoring. In addition, follow up videos for support are provided to all ToRs.</p> <p>Additionally, all departments created goals that were essentially aligned to the school goals which ultimately drove each staff member's individual goals. Evaluations are held during the year to stay up-to-date on each individual staff member's goals and areas of growth. All admin. and department leads are given the opportunity to attend 2-3 conferences and/or workshops throughout the year to increase their proficiency and develop their individual departmental goals.</p> <p>2019-2020</p> <p>For the 2019-20 school year, Excel provided a two-day tech training for all ToRs, which included sessions on G-Suite organization, School Pathways usage, and Team Drive training. Additionally, our all staff PD in August included a guest speaker in order to cast vision and set goals for our staff in conjunction with Excel Academy's theme for the 2019-20 school year: Growth Mindset. The topics for each session of this PD all contributed to this theme to push our staff towards this goal in every aspect of their work. All topics were selected by a combination of staff surveys and departmental needs. Surveys were sent to all staff before and after each PD and training, requesting staff to input the areas they would like most training in, as well as assessing the effectiveness of the training they received, how they were delivered, and how they could be improved. All these factors were taken into consideration when developing the agendas for each training and PD. Teachers had the ability to meet with each department in small group settings at our September training to get assistance and feedback on specific areas of need.</p>	<p>Briefly describe how teachers and staff are trained for continuous instructional improvement using the questions below as a guide.</p> <ul style="list-style-type: none"> • What are the major areas of focus of staff development, and, specifically, how were they selected? • What methods are used to deliver professional development (after-school workshops, conferences, individual mentoring)? • How are teachers supported during implementation (through in-class coaching, teacher-principal meetings, student-performance data reporting)?
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	<p>All admin. and department leads were given the opportunity to attend 2-3 conferences and/or workshops throughout the year to increase their proficiency and develop their individual departmental goals. Each of these admin. members and leads work in conjunction with the staff development coordinator to select the best and most useful workshops and conferences to attend. SMART goal evaluations were held between staff and their supervisors throughout the year to stay up-to-date on each individual staff member's goals and areas of growth.</p>	
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13. Ratio of Pupils to Academic Counselor

<i>Report information from the 2019-20 school year</i>		
	Ratio	Provide the ratio of pupils to academic counselors who are assigned to the school.
Pupils to counselors	1044 to 1 FTE	

14. School Support Staff

<i>Report information from the 2019-20 school year</i>		
School Support Staff	FTE (Full-Time Equivalent)	<p>Provide, in units of full-time equivalents (FTE), the number school support staff who are assigned to the school.</p> <p>One FTE equals one staff member working full-time; one FTE could also represent two staff members who each work 50 percent of full-time.</p> <p>If a position is held by a district employee and is shared by more than one school, please report his or her FTE for the school (e.g., one nurse shared for three schools equally could be 0.33 FTE).</p>
Counselor (academic, social/behavioral or career development)	1	
Library media teacher (librarian)	0	
Library media services staff (paraprofessional)	0	
Psychologist	1	
Social worker	0	
Nurse	0	
Speech/language/hearing specialist	0	
Resource specialist (nonteaching)	0	

15. Types of Services Funded

<i>Report information from the 2019-20 school year</i>		
Types of services funded:	<p>Title I Intervention services are provided to all at-promise students. These students receive evidence-based interventions and are closely monitored for progress. Our high school counselors are available to support the growing mental, social, and emotional needs of our students. Career and Technical Education courses are available for students who wish to pursue a specific pathway.</p>	<p>Provide specific information about the types of programs and services available at the school that support and assist students (such as Agricultural Career Technical Education, Class Size Reduction, Economic Impact Aid, Gifted and Talented Education</p>

		pupils, Rural Education Achievement, Title I, etc.).
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16. Career Technical Education

16a. Career Technical Education Programs

<i>Report information from the 2019–20 school year</i>		
CTE programs:	<p>Primary Representative – Lorrie Wood – High School Coordinator/English HQT</p> <p>Sequence: Education, Child Development & Family Services “Child Development” Pathway Marketing Sales & Service “Marketing” Pathway:</p> <p>Courses: 7510: Intermediate Child Development Concentrator 8310: Intermediate Marketing Concentrator</p> <p>The CTE courses serve as elective courses. They are not integrated into core courses. They help fulfill graduation requirements. EACS offers a range of CTE course options via online curriculum providers. Additionally, live, weekly instruction from a credentialed CTE instructor in their specific pathway is open to all students. Accommodations are made to ensure that the needs unique to defined special populations of students are met.</p> <p>Measurable outcomes for 7510: Intermediate Child Development Concentrator – As a result of this study of psychology, students will demonstrate the ability to: Understand the nature of human beings, both as individuals and as members of social groups. Appreciate psychology and theories, both as an academic discipline and as a body of knowledge relevant to the student’s life and culture. Apply critical thinking skills and be aware of the need for careful, objective evaluation of psychological ideas. Employ the various methods of psychological inquiry. Recognize and apply psychological principles to everyday situations including high ethical standards. Explain why knowledge of psychology is important to teach effectively; discuss, compare, and contrast the foundations of constructivist and behavioral psychology; Discuss, compare, and contrast constructivist and behaviorist models of teaching and learning; Identify and discuss two types of behavioral conditioning, and how each type can be used in the teaching/learning process;</p>	<p>Provide information about the programs and classes offered at the school that are specifically focused on career preparation and/or preparation for work using the items below as a guide:</p> <ul style="list-style-type: none"> Provide a list of Career Technical Education (CTE) programs and sequences offered at the schools by the district that are aligned to the applicable model curriculum standards. Provide a list of courses conducted by the regional occupational center or program. List the primary representative of the district’s career technical advisory committee and the industries represented. How are these programs and classes integrated with academic courses, and how do they support academic achievement? How does the school address the needs of all students in career preparation and/or preparation for work, including the needs unique to defined special populations of students? <p>What are the measurable outcomes of these programs and classes, and how are they evaluated for effectiveness in attaining those outcomes?</p>

Identify the key elements of psychological and social constructivism; and identify the cognitive skill levels of Bloom's Taxonomy, and discuss how teachers can apply the taxonomy to the constructivist model of teaching and learning.

Identify points of physical development that might be important for teachers of certain age levels;

Identify and discuss a variety of psychologists and leading professionals in the field

Discuss research and examples of bullies and psychopathic children and their impact in the educational setting.

Identify and discuss diversity based on individual and group differences, such as differences in learning styles and preferences, intelligences and sensitivities, cultures and ethnicities, and gender.

Identify and discuss diversity based on ability and disability, including the history of accommodating special needs students; the perspectives and strategies for accommodating special needs, such as IEPs and alternative assessment; and the categories of disabilities: learning, cognitive, sensory, behavioral, and physical

Identify and discuss at least four perspectives or theories of motivation, including their implications for teaching and learning; discuss the Expectancy x Value model of motivation and give examples of how it can be applied in a classroom; and identify and discuss at least five proven management strategies that enhance learning, encourage participation, and promote a caring classroom atmosphere while preventing misbehavior.

Methods of instruction:

Direct instruction

Group and individual applied projects

Multimedia

Demonstration

Field trips

Guest speakers

Evaluation methods:

Student projects

Written work

Exams

Observation record of student performance

Completion of assignment

Measurable outcomes for 8310: Intermediate Marketing Concentrator -

As a result of this study, students will demonstrate the ability to:

Relate philosophy, purpose and goals of CTE.

Explain the importance of meeting the demands of the 21st century workplace.

Explain the "Drivers of Change" and how it relates to college and career. Discuss health and safety policies, procedures, regulations, practices and exhibit the proper use of equipment and handling of hazardous materials.

Explain the reasoning of basic safety rules in the classroom and workplace. Demonstrate an understanding of safety rules and practices by passing an assessment, with 90% accuracy. Apply appropriate technical skills and academic knowledge.

Analyze and apply appropriate academic standards required for successful industry sector pathway completion leading to postsecondary education and employment. Refer to the industry sector alignment matrix for identification of standards. Communicate clearly, effectively, and with reason.

Explain how a positive attitude can help in becoming an effective communicator.

Practice good communication to help build positive relationships in the classroom and at the workplace. Compare and contrast written and oral communications.

Describe the importance of email etiquette as it relates to effective communication.

Assess how nonverbal communication affects messages.

Explain the impact of personal and professional social media in communication.

Describe issues related to communicating in a global society.

Explain the appropriate etiquette for answering telephone calls and leaving voicemail messages; receiving and making requests; giving directions and persuading others.

Identify the steps to plan a successful oral presentation.

Develop an education and career plan aligned with personal goals.

Integrate multiple sources of information presented in diverse formats and media (e.g., visually, quantitatively, orally) in order to make informed decisions and solve problems, evaluating the credibility and accuracy of each source and noting any discrepancies among the data.

Apply the decision-making process to develop a college and career plan.

Identify employability skills required for participation in the world of work.

Assess interests, skills and aptitudes and match these to career options.

Identify further education and/or training needed for career choices.

Develop a resume, cover letter and other resources for the job search process.

Complete a job application.

Identify what employers are looking for when hiring employees.

Apply effective interviewing skills and write a thank-you note.

Act as a responsible citizen in the workplace and the community.

Explain what the school, workplace and community expects of a student as a member of society.

Identify personality and behavior characteristics that have a positive or negative impact at school, in the workplace, and in the community.

Identify areas in which sensitivity is required in a diverse workplace.

Model integrity, ethical leadership, and effective management.

Respond thoughtfully to diverse perspectives; synthesize comments, claims, and evidence made on all sides of an issue; resolve contradictions when possible; and determine what additional information or research is required to deepen the investigation or complete the work.

Define integrity and how it relates to the classroom and workplace.

Work productively in teams while integrating cultural and global

competence.

Define human relations.

Explain the need for effective human relations skills at school and in the workplace.

Contrast the characteristics and consequences of positive and negative attitudes.

Recognize the contributions of diversity in society and in the workplace.

Assess the value of teamwork in the classroom and workplace.

Identify strategies that can be used to promote good working relationships within the classroom and in the workplace.

Explain the importance of networking.

Identify verbal, non-verbal, and physical types of harassment as defined by the state/federal law and determine appropriate behavior in the workplace.

Demonstrate creativity and innovation.

Identify how new ideas, thinking, tasks, solutions, and methods can be fostered in the workplace.

Explain the appropriate and constructive expression of creativity and innovation at school and in a workplace situation.

Employ valid and reliable research strategies.

Identify strategies for conducting basic research.

Analyze the characteristics of successful entrepreneurs.

Understand the role of government in the free enterprise system and its impact on small businesses.

Understand the relationship between supply and demand and pricing and production.

Understand the different types of business ownership and the advantages and disadvantages of owning and managing a small business.

Know the elements of effective human resources management and how these practices benefit small businesses.

Understand the reasons a small business develops a business plan.

Understand how products and services are conceived, developed, maintained, and improved in response to market opportunities.

Understand how market research is used to develop strategies for marketing products or services in a small business.

Analyze market research to develop a marketing plan.

Conduct market research by using a variety of methods.

Develop a financial plan that outlines sources of capital and projects income and expenses.

Analyze a proposed business situation and its potential market.

Solve problems that involve discounts, markups, commissions,

Understand how market research is used to develop strategies for marketing products or services in a small business.

Understand how products and services are conceived, developed, maintained, and improved in response to market opportunities.

Understand the financial concepts used in making marketing decisions.

Formulate pricing strategies for goods and services for a small business.

	<p>Understand the relationship between supply and demand and pricing and production.</p> <p>Understand the role of personal integrity and ethical behavior in the workplace.</p> <p>Understand the importance of accountability and responsibility in fulfilling personal, community, and workplace roles.</p> <p>Methods of instruction:</p> <p>Direct instruction</p> <p>Group and individual applied projects</p> <p>Multimedia Demonstration</p> <p>Guest speakers</p> <p>Evaluation methods:</p> <p>Student projects</p> <p>Written work</p> <p>Exams</p> <p>Observation record of student performance</p> <p>Completion of assignment</p>	
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16b. Career Technical Education Participation

<i>Report information from the 2019–20 school year</i>		
Number of pupils participating in a CTE program	6 students	Provide participation data regarding the Career Technical Education program at the school.
Percentage of pupils who completed a CTE program and earn a high school diploma	0 students	
Percentage of CTE courses that are sequenced or articulated between a school and institutions of postsecondary education.	0 students	

17. Class Size Distribution

<i>Report information from the 2019–20 school year</i>		
Class size:	24	Please review and update if necessary.

*Please review your questionnaire and make sure all sections have been completed.
Be sure to save a copy for your records and email us the questionnaire as an attachment.*

Thank you for completing your SARC questionnaire!

EXCEL ACADEMY CHARTER SCHOOLS

Agenda Item: 10.5

Date: January 14, 2021

	Correspondence/Proposals/Reports
X	Consent Agenda
	Business/Financial Services
	Education/Student Services
X	Personnel Services
	Curriculum
	Policy Development

Item Requires Board Action: X

Item is for Information Only: _____

Item: Approve revisions to the Employee Handbook to align with state law changes effective January 1, 2021

Background:

Revisions to California State law prompted the review and revision of sections in the Employee Handbook. The revisions to the handbook will align the policies and procedures with state law effective January 1, 2021, and will be provided to each employee electronically through the internal human resources information system.

The proposed changes to the Employee Handbook provide clarity in the eligibility and application of the following leave policies: Paid Family Leave (PFL), Family Medical Leave Act (FMLA) and California Family Rights Act (CFRA). The language was revised to align with changes in State law and to clarify how and when these provisions apply.

It is recommended the Board approve the revisions to the Employee Handbook and direct staff to provide the revisions to all employees for acknowledgement.

Fiscal Impact:

None

EMPLOYEE HANDBOOK REVISIONS - EXCEL ACADEMY CHARTER SCHOOL

January 2021

Location	Item
<p><i>Section VIII: Leaves, Vacation, Holidays</i> <i>C. California State Benefits</i></p> <p><i>Change from C.8 to C and reorder Pregnancy Disability Leave (PDL) to Section D, etc.</i></p>	<p>Revise:</p> <p>C. California State Benefits</p> <p>California State Disability Insurance (SDI) is funded through employee contributions and is designed to provide eligible workers with partial wage replacement when taking time off work for their non-work-related illness or injury, pregnancy, or childbirth.</p> <p>California Paid Family Leave (PFL) provides employees residing in the State of California with the ability to access their State Disability Insurance for partial wage replacement benefits to care for a seriously ill child, parent, parent-in-law, grandparent, grandchild, sibling, spouse, or registered domestic partner, or to bond with a new child by birth, adoption, or foster care placement.</p> <p>PFL Military Assist benefits are available to eligible employees who request time off work to participate in a qualifying event due to the military deployment of their spouse, registered domestic partner, parent, or child to a foreign country.</p> <p>Employees must notify HR of their plan to take leave and the reason for taking leave according to the School’s policy. HR is available to assist employees with applying for State Disability benefits through the Employment Development Department. Employees may be eligible to receive PFL benefits while on a leave of absence to care for a seriously ill family member or for baby bonding. Employees are not eligible for PFL benefits when on PDL, FMLA, or CFRA leave for their own serious health condition.</p>

	<p>PFL is not a guaranteed right to a leave of absence, and employees taking PFL or PFL Military Assist are not provided job protection rights or a right to return to the same position following their absence.</p> <p>8) State Benefits</p> <p>California State Disability Insurance (SDI) and California Paid Family Leave (PFL) are designed to provide eligible workers with partial wage replacement when taking time off work for their own serious medical condition, to care for a child, parent, parent-in-law, grandparent, grandchild, sibling, spouse, registered domestic partner or to bond with a new child. Although it provides monetary benefits, it does not provide job protection rights. For more information or to file a SDI or PFL claim, please contact HR.</p>
<p>Section VIII: Leaves, Vacation, Holidays</p> <p>D. Pregnancy Disability Leave</p>	<p>Revise:</p> <p>2) Health Benefits</p> <p>The provisions of various employee benefit plans govern continued eligibility during pregnancy disability leave and these provisions may change from time to time. When a request for pregnancy disability leave is granted, the School will give the employee written confirmation of the arrangements made for the payment of insurance premiums during the leave period.</p> <p>(new paragraph)</p> <p><i>If the employee takes pregnancy disability leave and is eligible under the Family Medical Leave Act (FMLA), the School will maintain group health insurance coverage for up to a maximum of 12 workweeks (if such insurance was provided before the leave was taken) on the same terms as if the employee had continued to work after PDL ended. Leave taken under the pregnancy disability policy runs concurrently with FMLA under federal law, but not California Family Rights Act (CFRA). If the employee is ineligible under the federal and state family and medical leave laws, while</i></p>

on pregnancy disability they will receive continued paid coverage on the same basis as other medical leave that the School may provide and for which the employee is eligible, such as continued PDL. In some instances, the School may recover premiums it paid to maintain health coverage for the employee if they fail to return to work following pregnancy disability leave.

Revise:

5) Return to Work (combine section 3 and section 6, then renumber the sections)

An employee on pregnancy disability leave remains an employee of the School and a leave will not constitute a break in service. ~~When an employee returns from pregnancy disability leave, the employee will return with the same seniority as when the leave commenced.~~ ***When an employee returns from pregnancy disability leave, the employee will return to their original job or an equivalent job with equivalent pay, benefits, and other employment terms and conditions with the same position as when the leave commenced.***

~~Upon timely return at the expiration of the pregnancy disability leave period, an employee is entitled to the same position unless the employee would not otherwise have been employed in the same position (at the time reinstatement is requested).~~

If the employee is not reinstated to the same *original* position, the employee ~~must be~~ will be reinstated to a comparable position unless there is no comparable position available or a comparable position is available, but filling that position with the returning employee would substantially undermine the School's ability to operate the business safely and efficiently. A "comparable" position is a position that involves the same or similar duties and responsibilities and is virtually identical to the employee's original position in terms of pay, benefits, and working conditions.

~~When a request for pregnancy disability leave is granted to an employee, the School will give the employee a written guarantee of reinstatement at the end of the leave (with the limitations explained above).~~

<p>Section VIII: Leaves, Vacation, Holidays E. Family and Medical Leave Act (FMLA), California Family Rights Act (CFRA)</p> <p>Separate FMLA and CFRA in the handbook and in the schools' policies.</p>	<p>Revise: This section has been re-written to align with the law changes effective January 1, 2021, and to provide clarity regarding each type of leave and their interaction.</p> <p><i>E. Family and Medical Leave Act (FMLA) and California Family Rights Act (CFRA)</i> <i>The School complies with the federal Family and Medical Leave Act (“FMLA”) and the California Family Rights Act (“CFRA”), both of which require the School to permit each eligible employee to take a leave of absence. The following information provides employees with a general description of their FMLA and CFRA rights.</i></p> <p><i>Calculating 12-Month Period for FMLA and CFRA</i></p> <p><i>For purposes of calculating the 12-month period during which 12 weeks CFRA or qualifying exigency leaves may be taken, the School uses the “rolling” method also known as the look back method. For example, if an employee begins their leave on March 5, the look back period is 12 months from that date.</i></p> <p><i>Under some circumstances, leave under FMLA and CFRA may run at the same time and the eligible employee will be entitled to a total of 12 weeks of family and medical leave in the designated 12-month period. Accrued sick leave will be paid to the employee starting with the first day of absence until exhausted and will run concurrently with FMLA and/or CFRA leave.</i></p> <p><i>For leave to care for a covered service member, the 12-month period begins on the first day of the leave, regardless of how the 12-month period is calculated for other leaves. Leave to care for a covered service member is for a maximum of 26 workweeks during a 12-month period.</i></p> <p><i>Leave granted under any of the reasons provided by state and federal law will be counted as FMLA and/or CFRA leave and will be considered as part of the 12-workweek entitlement (26-work week entitlement if leave is to care for a service member) in a 12-month period. The 12-month period is measured forward from the</i></p>
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date any employee's first FMLA/CFRA leave begins. Successive 12-month periods commence on the date of an employee's first use of such leave after the preceding 12-month period has ended. No carryover of unused leave from one 12-month period to the next 12-month period is permitted.

Pregnancy, Childbirth or Related Conditions Under FMLA, CFRA and PDL

Time off due to pregnancy disability, childbirth or related medical condition falls under pregnancy disability leave (PDL) and FMLA leave and is not concurrent with CFRA leave. Employees who may not be eligible for FMLA leave may still be eligible for leave under PDL. Once the pregnant employee is no longer disabled, or once the employee has exhausted PDL and has given birth, they may apply for leave under CFRA, for purposes of baby bonding.

1) FAMILY MEDICAL LEAVE ACT

Employee Eligibility Criteria

FMLA leave provides up to 12 workweeks of unpaid, job protected leave within a 12-month period, under the following conditions:

- *The employee must have been employed by the School for at least twelve (12) months,*
- *The employee has worked at least 1,250 hours during the previous 12-month period before the need for leave; and*
- *The employee is employed at a location where the School has at least fifty (50) employees within a seventy-five (75) mile radius, except for purposes of baby-bonding where the threshold is twenty (20) employees.*

FMLA leave may be taken for one or more of the following reasons:

1. *The birth of the employee's child, or placement of a child with the employee for*

adoption or foster care. When both parents are employed by the School, and request simultaneous leave for the birth or placement for adoption or foster care of a child, the School will not grant more than a total of 12 workweeks of FMLA leave for this reason.

- 2. Due to the employee's own serious health condition causing the employee to be unable to perform one or more of the essential functions of their job. This excludes a disability caused by pregnancy, childbirth, or related medical conditions, as they are covered by the School's pregnancy disability policy.*
- 3. To care for the employee's family member including a spouse, registered domestic partner, child, or parent who has a serious health condition or military service-related injury. When an employee is providing care for an injured spouse, child, parent, or next of kin who is a covered Armed Forces service member, the employee may take a maximum of twenty-six (26) weeks of FMLA leave in a single twelve (12) month period.*

Intermittent Leave under FMLA

Full-time employees may take leave of up to 12 workweeks in a rolling 12-month period. Part-time employees may take leave on a proportional basis. The leave does not need to be taken in one continuous period of time. Under FMLA, the employee must have the School's agreement to take intermittent leave.

2) CALIFORNIA FAMILY RIGHTS ACT

The Fair Employment and Housing Act (FEHA), enforced by the Department of Fair Employment and Housing (DFEH), contains family care and medical leave provisions for California employees. CFRA applies to all employees of the state of California and any other political or civil subdivision of the state and cities, regardless of the number of employees.

Employee Eligibility Criteria

CFRA leave provides up to 12 workweeks of unpaid, job protected leave within a 12-month period, under the following conditions:

- *The employee has more than 12 months of service.*
- *The employee has worked at least 1,250 hours during the previous 12-month period before the need for leave; and*
- *The employee is employed at a worksite where there are 5 or more employees within a 75 mile radius.*

CFRA leave may be taken for one or more of the following reasons:

1. *The birth of the employee's child, or placement of a child with the employee for adoption or foster care. If the School employs both parents of a child, it will grant up to 12 weeks of leave to each employee.*
2. *To care for the employee's parent, spouse, registered domestic partner, child, grandparent, grandchild, and sibling who has a serious health condition.*
3. *For a serious health condition that renders the employee unable to perform their job.*
4. *To care for the employee's family member including a spouse, registered domestic partner, child, or parent who has a military service-related injury. When an employee is providing care for an injured spouse, child, parent, or next of kin who is a covered Armed Forces service member, the employee may take a maximum of twenty-six (26) weeks of CFRA leave in a single twelve (12) month period.*

Intermittent Leave under CFRA

Full-time employees may take leave of up to 12 workweeks in a rolling 12-month period. Part-time employees may take leave on a proportional basis. The leave does not need to be taken in one continuous period of time. Employees do not need the School's agreement to take intermittent bonding leave. In the case of intermittent leave, the

employee may be required to use such leave in two-week minimum increments, with an exception for shorter increments on at least two occasions.

3) PROCESS FOR REQUESTING FMLA/CFRA LEAVE

Leave Procedures

The following procedures shall apply when an employee requests leave:

The employee must contact HR as soon as the need for the leave is realized.

If the leave is based on the expected birth, placement for adoption or foster care, or planned medical treatment for a serious health condition of the employee or an eligible family member per FMLA or CFRA, the employee must notify the School at least 30 days before the leave is to begin. The employee must consult with their supervisor regarding scheduling of any planned medical treatment or supervision in order to minimize disruption to the operations of the School. Any such scheduling is subject to the approval of the health care provider of the employee or the health care provider of the applicable family members.

If the employee cannot provide 30 days' notice, the School must be informed as soon as is practical. Notice can be written or verbal and should include the timing and the anticipated duration of the leave, but the School does not require disclosure of an underlying diagnosis. The School will respond to a leave request within 5 business days. The School requires written communication from the health-care provider stating the reason for the leave and the probable duration of the condition. However, the health care provider may not disclose the underlying diagnosis without the consent of the patient.

If the FMLA/CFRA leave request is made because of the employee's own serious health condition, the School may require, at its expense, a second opinion from a health care provider that the School chooses. The health care provider designated to give a second opinion will not be one who is employed on a regular basis by the School.

If the second opinion differs from the first opinion, the School may require, at its expense, the employee to obtain the opinion of a third health care provider designated or approved jointly by the employer and the employee. The opinion of the third health care provider shall be considered final and binding on the School and the employee. While waiting for a second or third opinion, the employee is provisionally entitled to FMLA/CFRA leave.

The School requires the employee to provide certification within 15 days of any request for FMLA/CFRA, unless it is not practicable to do so. The School may require recertification from the health care provider if additional leave is required. For example, if an employee needs two weeks of family and medical leave, but following the two weeks needs intermittent leave, a new medical certification will be requested and required. If the employee does not provide medical certification in a timely manner to substantiate the need for leave, the School may delay approval of the leave, or continuation thereof, until certification is received. If certification is never received, the leave may not be considered family and medical leave.

If the leave is needed to care for approved family members per FMLA/CFRA, the employee must provide a certification from the health care provider stating:

- 1. Date of commencement of the serious health condition;*
- 2. Probable duration of the condition;*
- 3. Estimated amount of time for care by the health care provider; and*
- 4. Confirmation that the serious health condition warrants the participation of the employee.*

Certification

If an employee cites their own serious health condition as a reason for leave, the employee must provide a certification from the health care provider stating:

- 1) Date of commencement of the serious health condition;***
- 2) Probable duration of the condition; and***
- 3) Inability of the employee to work at all or perform any one or more of the essential functions of their position because of the serious health condition.***

The School will require certification by the employee's health care provider that the employee is fit to return to their job. Failure to provide certification by the health care provider of the employee's fitness to return to work may result in denial of reinstatement for the employee until the certificate is obtained.

4) PAY AND BENEFITS UNDER FMLA/CFRA

Health and Benefit Plans

The School provides health benefits under a group plan, and will therefore continue to make these benefits available during the leave if the employee is enrolled in the group plan. An employee taking FMLA/CFRA leave will be allowed to continue participating in any health and welfare benefit plans in which they were enrolled before the first day of the leave (for a maximum of 12 workweeks, or 26 workweeks if the leave is to care for a covered service member) at the level and under the conditions of coverage as if the employee had continued in employment for the duration of such leave. The School will continue to make the same premium contribution as if the employee had continued working. The continued participation in health benefits begins on the date leave first begins. In some instances, the School may recover from employee premiums paid to

maintain health coverage if the employee fails to return to work following family/medical leave. An employee is deemed to have “failed to return from leave” if they do not return following the leave of absence, or work less than thirty (30) days after returning from leave. Employees on pregnancy disability leave will be allowed to continue to participate in group health coverage for up to a maximum of four months (or for the approved time) of pregnancy disability leave (if such insurance was provided before the leave was taken) on the same terms as if the employee had continued to work. The employee will also continue to make premium payments, if applicable, based on the payment schedule outlined in the premium payment letter. They will then be able to remain on benefits for any time taken under approved FMLA/CFRA leave if they are eligible for those leaves. Payment is due when it would be made by payroll deduction.

Substitution of Paid Leave

Generally, FMLA/CFRA leave is unpaid. The School is not required to pay employees during FMLA/CFRA leave and may require an employee to use accrued vacation time or other accumulated paid leave other than sick time. If the FMLA/CFRA leave is for the employee’s own serious health condition the use of sick time is required and will run concurrent with FMLA/CFRA leave.

Time Accrual

Sick pay will accrue during any period of unpaid disability leave only until the end of the month in which the unpaid leave began. For example, an employee who delivers their baby on March 5 and goes out on leave on that date, would earn one day of sick leave for the month of March. Accrual for leave would be suspended until the employee returns from leave. All sick leave will be applied starting with the first day of absence until the leave is exhausted.

COBRA Benefits

If an employee requires additional leave after all protected leaves have been exhausted (PDL, FMLA, CFRA), they will be eligible for continued benefits through COBRA.

5). REINSTATEMENT UPON RETURN FROM FMLA/CFRA

Under most circumstances, upon return from FMLA/CFRA leave, an employee will be reinstated to their original job or to an equivalent job with equivalent pay, benefits, and other employment terms and conditions. However, an employee has no greater right to reinstatement than if they had been continuously employed rather than on leave. For example, if an employee on FMLA/CFRA leave would have been laid off had they not gone on leave, or if the employee's job is eliminated during the leave and no equivalent or comparable job is available, then the employee would not be entitled to reinstatement. In addition, an employee's use of FMLA/CFRA leave will not result in the loss of any employment benefit that the employee earned before using family/medical leave.

Reinstatement after FMLA leave may be denied to certain salaried "key" employees under the following conditions:

- 1) An employee requesting reinstatement was among the highest-paid 10 percent of salaried employees employed within 75 miles of the work site at which the employee worked at the time of the leave request;***
- 2) The refusal to reinstate is necessary because reinstatement would cause substantial and grievous economic injury to the School's operations;***
- 3) The employee is notified of the School's intent to refuse reinstatement at the time the School determines the refusal is necessary; and***
- 4) If leave has already begun, the School gives the employee a reasonable opportunity to return to work following the notice described previously.***

Under CFRA, the School will reinstate "key" employees.

Employees should contact HR for additional information about eligibility for FMLA, CFRA or PFL.

Following is the current wording in the Handbook that will be replaced upon approval of the Board of Directors.

~~Family Medical Leave Act (FMLA)~~

~~Federal family and medical leave law provides up to 12 workweeks of unpaid, job protected family/medical leave within a 12-month period, under the following conditions:~~

- ~~● The employee has more than 12 months of service. The 12 months of service must have accumulated within the previous seven (7) years.~~
- ~~● The employee has worked at least 1,250 hours during the previous 12-month period before the need for leave; and~~
- ~~● The employee is employed at a worksite where there are 50 or more employees within a 75-mile radius.~~

~~Leave may be taken for one or more of the following reasons:~~

- ~~1. The birth of the employee's child, or placement of a child with the employee for adoption or foster care.~~
- ~~2. To care for the employee's spouse, child, or parent who has a serious health condition.~~
- ~~3. For a serious health condition that renders the employee unable to perform their job.~~

- ~~4. For any 'qualifying exigency' (defined by federal regulation) because the employee is the spouse, son, daughter, or parent of an individual on covered active duty (or has been notified of an impending call or order to active duty) in the Armed Forces; or~~
- ~~5. An employee who is the spouse, son, daughter, parent, or next of kin of a covered service member shall be entitled to a total of 26 workweeks of leave during a 12-month period to care for the service member.~~

~~Calculating the 12-month Period~~

~~For purposes of calculating the 12-month period during which 12 weeks of FMLA or qualifying exigency leaves may be taken, the School uses the "rolling" method also known as the look back method. For example, if an employee begins their leave on March 5, the look back period is 12 months from that date.~~

~~Under some circumstances, leave under federal and state law will run at the same time and the eligible employee will be entitled to a total of 12 weeks of family and medical leave in the designated 12-month period. Accrued sick leave will be paid to the employee starting with the first day of absence until exhausted and will run concurrently with FMLA/CFRA leave.~~

~~For leave to care for a covered service member, the 12-month period begins on the first day of the leave, regardless of how the 12-month period is calculated for other leaves. Leave to care for a covered service member is for a maximum of 26 workweeks during a 12-month period.~~

~~Pregnancy, Childbirth or Related Conditions and FMLA~~

~~However, leave because of the employee's disability for pregnancy, childbirth or related~~

~~medical condition is not counted as time used under California law (CFRA). Time off due to pregnancy disability, childbirth or related medical condition does count as family and medical leave under federal law (FMLA). Employees who take time off for pregnancy disability and who are eligible for family and medical leave will also be placed on family and medical leave that runs at the same time as their pregnancy disability leave. Once the pregnant employee is no longer disabled, or once the employee has exhausted PDL and has given birth they may apply for leave under the California Family Rights Act, for purposes of baby bonding.~~

~~California Family Rights Act (CFRA)~~

~~The Fair Employment and Housing Act (FEHA), enforced by the Department of Fair Employment and Housing (DFEH), contains family care and medical leave provisions for California employees. These leave provisions are known as the California Family Rights Act (CFRA).~~

~~Under CFRA, if you have worked more than 12 months of service with your employer, and have worked at least 1,250 hours in the 12-month period before the date you want to begin your leave you may have a right to family care or medical leave. In workplaces of 5 or more persons, this leave may be up to 12 workweeks in a rolling 12-month period for the birth of a child or the placement of a child for adoption or foster care. If the School employs both parents of a child, it will grant up to 12 weeks of leave to each employee. In workplaces of 5 or more persons, this right to take leave also extends to leave taken for your own serious health condition or to care for a parent, spouse, registered domestic partner, child, grandparent, grandchild, and sibling with a serious health condition. CFRA applies to all employees of the state of California and any other~~

~~political or civil subdivision of the state and cities, regardless of the number of employees.~~

~~To be eligible for CFRA leave, an employee must have worked more than 12 months of service with the School and have worked at least 1,250 hours for the School in the 12-month period before the leave begins.~~

~~An eligible employee may take an unpaid leave to bond with an adopted or foster child or to bond with a newborn. Eligible employees may take unpaid leave to care for a parent, spouse, registered domestic partner, child, grandparent, grandchild, sibling and parent-in-law with a serious health condition. CFRA leave may also be taken for the employee's own serious health condition.~~

~~Pregnancy, Childbirth or Related Conditions and FMLA~~

~~However, leave because of the employee's disability for pregnancy, childbirth or related medical condition is not counted as time used under California law (CFRA). Time off due to pregnancy disability, childbirth or related medical condition does count as family and medical leave under federal law (FMLA). Employees who take time off for pregnancy disability and who are eligible for family and medical leave will also be placed on family and medical leave that runs at the same time as their pregnancy disability leave. Once the pregnant employee is no longer disabled, or once the employee has exhausted PDL and has given birth they may apply for leave under the California Family Rights Act, for purposes of baby bonding.~~

~~Full-time employees may take leave of up to 12 work weeks in a rolling 12-month period. Part-time employees may take leave on a proportional basis. The leave does not need to be taken in one continuous period of time. Employees do not need the School's~~

~~agreement to take intermittent bonding leave. In the case of intermittent leave, the employee may be required to use such leave in two-week minimum increments, with an exception for shorter increments on at least two occasions.~~

~~The School requires a 30-day advance notice of the need for a CFRA-qualifying leave. When this is not possible due to the unexpected nature of the qualifying event, notice should be given as soon as practicable. Notice can be written or verbal and should include the timing and the anticipated duration of the leave, but the School does not require disclosure of an underlying diagnosis. The School will respond to a leave request within 5 business days. The School requires written communication from the health-care provider of the child, parent, registered domestic partner, grandparent, grandchild, sibling or employee with a serious health condition stating the reason for the leave and the probable duration of the condition. However, the health care provider may not disclose the underlying diagnosis without the consent of the patient.~~

~~In addition to the family care and medical leave requirements of the CFRA, employers of five or more persons have additional obligations pertaining to pregnancy disability leave (PDL). Employees are entitled to take CFRA leave in addition to any leave entitlement they might have under PDL. Leave taken for the birth or adoption of a child must be completed within one year of the event.~~

~~The School is not required to pay employees during a CFRA leave and may require an employee to use accrued vacation time or other accumulated paid leave other than sick time. If the CFRA leave is for the employee's own serious health condition, the use of sick time is required.~~

	<p>The School provides health benefits under a group plan, therefore will continue to make these benefits available during the leave if the employee is enrolled in the group plan. The employee will also continue to make premium payments, if applicable, based on the payment schedule outlined in the premium payment letter. Similarly, the employee is entitled to continue accruing seniority and participate in other benefit plans.</p> <p>After CFRA leave, employees are guaranteed a return to the same or comparable position and can request the guarantee in writing. If the same position is no longer available, such as in a layoff or closure, the School must offer a position that is comparable in terms of pay, benefits, shift, schedule, geographic location, and working conditions, including privileges, perquisites, and status, unless the School can prove that no comparable position exists. An employee is not entitled to reinstatement if the employee would have been otherwise laid off or terminated. SB1383, does not permit the School to refuse reinstatement of "key employees."</p>
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Employee Name: _____ Employee Signature: _____ Date: _____

EXCEL ACADEMY CHARTER SCHOOLS

Agenda Item: 10.6

Date: January 14, 2021

	Correspondence/Proposals/Reports
X	Consent Agenda
	Business/Financial Services
	Education/Student Services
X	Personnel Services
	Curriculum
	Policy Development

Item Requires Board Action: X

Item is for Information Only: _____

Item: Approval of 2021 IRS Mileage Reimbursement Rate

Background:

Staff who use their personal vehicle to drive for work related business are entitled to receive reimbursement for their wear and gasoline. Each year the IRS approves a standard per mile rate for reimbursement. This past year, the IRS approved a rate decrease from \$0.575/mile in 2020 to \$0.56/mile in 2021, taking effect January 1.

It is recommended the school’s reimbursement rate align with the IRS established rate in order to ensure that employees are compensated fairly, in alignment with federal recommendations.

It is recommended that the Board of Directors adopt the new IRS rate for mileage reimbursement, effective January 1, 2021, through December 31, 2021.

Fiscal Impact:

Due to COVID-19 restrictions, travel has been significantly reduced. Minimal travel reimbursement is projected for the remainder of the 2020-2021 school year. The estimated reimbursement amount for the period of January 1 through December 31, 2021 is as follows:

CalPac Los Angeles \$2,000

CalPac San Diego \$4,100

CalPac Sonoma \$2,000

Excel Academy (Warner) \$7,000

Excel Academy (Helendale) \$3,000

Motivated Youth Academy \$1,000

Pathways Academy Charter School - Adult Education (Acton) \$0
Pathways Academy Charter School - Adult Education (Warner) \$300

Sage Oak Charter School \$7,000
Sage Oak Charter - South \$3,000
Sage Oak Charter - Keppel \$3,000

Collaborative Charter Services Organization \$2,000

EXCEL ACADEMY CHARTER SCHOOLS

Agenda Item: 10.7

Date: January 14, 2021

	Correspondence/Proposals/Reports
X	Consent Agenda
	Business/Financial Services
	Education/Student Services
	Personnel Services
	Curriculum
X	Policy Development

Item Requires Board Action: X

Item is for Information Only: _____

Item: Approval of existing board policies reviewed and revised by staff for the 2020-2021 School Year.

Background:

In order to ensure adherence with State and federal laws related to personnel services, it is recommended the Board approve the following policy as presented.

REVISED

The following are current policies that have been revised to provide clarity or alignment with changes in law or procedures.

4000 Series - Personnel Services

4115 Family Care and Medical Leave Policy

Revisions: The policy was updated to reflect revisions to the California Family Rights Act and alignment of the California law with the federal Family and Medical Leave Act benefits.

It is recommended the Board approve the revised board policy for the 2020-2021 school year.

Fiscal Impact: None.

EXCEL ACADEMY CHARTER SCHOOLS

Agenda Item: 11.1

Date: January 14, 2021

	Correspondence/Proposals/Reports
	Consent Agenda
	Business/Financial Services
	Education/Student Services
X	Personnel Services
	Curriculum
	Policy Development

Item Requires Board Action: X

Item is for Information Only: _____

Item: Approve Declaration of Need for Emergency CLAD

Background:

To be in compliance with AB 1219 all teachers that service English Learners are required to hold an English Learner Authorization (ELA) or equivalent. The purpose of the Emergency CLAD and BCLAD Permits is to allow qualified teachers to be employed while completing requirements for the English Learner Authorization/CLAD Certificate or Bilingual Authorization. Teachers must show progress toward obtaining the certificate or authorization with each renewal. The emergency permits are valid for one year, but may not exceed the expiration date of the prerequisite credential or permit.

This year the schools participated in credential monitoring of their 2019-20 school year teacher assignments using the new State database CALSAAS. Findings from the December 2020 CALSAAS report showed that two (2) teachers do not currently hold the appropriate ELA resulting in teacher mis-assignments. In order to correct and avoid further mis-assignment status these teachers need to apply for an emergency CLAD and fulfill the requirements to obtain a valid ELA. These teachers will sign and agree to work through an accredited California college or university to complete a minimum of six (6) semester units of coursework, or pass two of the three CTEL exams, for each year while holding this emergency permit.

One of the requirements for initial issuance is that the employing agency must have an annual Declaration of Need for Fully Qualified Educators (CL500) on file with the Commission.

It is recommended the Board approve the Declaration of Need as presented and direct staff to file the resolution with the Commission on Teacher Credentialing.

Fiscal Impact:

None



State of California
 Commission on Teacher Credentialing
 Certification Division
 1900 Capitol Avenue
 Sacramento, CA 95811-4213

Email: credentials@ctc.ca.gov
 Website: www.ctc.ca.gov

DECLARATION OF NEED FOR FULLY QUALIFIED EDUCATORS

Original Declaration of Need for year: 2020-2021

Revised Declaration of Need for year: _____

FOR SERVICE IN A SCHOOL DISTRICT

Name of District: Excel Academy Charter School District CDS Code: 37754160139386

Name of County: N/A County CDS Code: _____

By submitting this annual declaration, the district is certifying the following:

- A diligent search, as defined below, to recruit a fully prepared teacher for the assignment(s) was made
- If a suitable fully prepared teacher is not available to the school district, the district will make a reasonable effort to recruit based on the priority stated below

The governing board of the school district specified above adopted a declaration at a regularly scheduled public meeting held on 01 / 14 / 21 certifying that there is an insufficient number of certificated persons who meet the district's specified employment criteria for the position(s) listed on the attached form. The attached form was part of the agenda, and the declaration did NOT appear as part of a consent calendar.

► **Enclose a copy of the board agenda item**

With my signature below, I verify that the item was acted upon favorably by the board. The declaration shall remain in force until June 30, 2021.

Submitted by (Superintendent, Board Secretary, or Designee):

Secretary of the Board

<i>Name</i>	<i>Signature</i>	<i>Title</i>
(760) 494-9646	01/14/21	<i>Date</i>
<i>Fax Number</i>	<i>Telephone Number</i>	<i>Date</i>

1 Technology Drive, Bldg I, Suite 811, Irvine, CA 92618

Mailing Address

EMail Address

FOR SERVICE IN A COUNTY OFFICE OF EDUCATION, STATE AGENCY OR NONPUBLIC SCHOOL OR AGENCY

Name of County N/A County CDS Code _____

Name of State Agency _____

Name of NPS/NPA _____ County of Location _____

The Superintendent of the County Office of Education or the Director of the State Agency or the Director of the NPS/NPA specified above adopted a declaration on ____/____/____, at least 72 hours following his or her public announcement that such a declaration would be made, certifying that there is an insufficient number of certificated persons who meet the county's, agency's or school's specified employment criteria for the position(s) listed on the attached form.

The declaration shall remain in force until June 30, _____.

► **Enclose a copy of the public announcement**

Submitted by Superintendent, Director, or Designee:

<i>Name</i>	<i>Signature</i>	<i>Title</i>
<i>Fax Number</i>	<i>Telephone Number</i>	<i>Date</i>
<i>Mailing Address</i>		
<i>E-Mail Address</i>		

► *This declaration must be on file with the Commission on Teacher Credentialing before any emergency permits will be issued for service with the employing agency*

AREAS OF ANTICIPATED NEED FOR FULLY QUALIFIED EDUCATORS

Based on the previous year's actual needs and projections of enrollment, please indicate the number of emergency permits the employing agency estimates it will need in each of the identified areas during the valid period of this Declaration of Need for Fully Qualified Educators. This declaration shall be valid only for the type(s) and subjects(s) identified below.

This declaration must be revised by the employing agency when the total number of emergency permits applied for exceeds the estimate by ten percent. Board approval is required for a revision.

Type of Emergency Permit	Estimated Number Needed
CLAD/English Learner Authorization (applicant already holds teaching credential)	2 _____
Bilingual Authorization (applicant already holds teaching credential)	0 _____
List target language(s) for bilingual authorization: N/A _____	
Resource Specialist	0 _____
Teacher Librarian Services	0 _____

LIMITED ASSIGNMENT PERMITS

Limited Assignment Permits may only be issued to applicants holding a valid California teaching credential based on a baccalaureate degree and a professional preparation program including student teaching.

Based on the previous year's actual needs and projections of enrollment, please indicate the number of Limited Assignment Permits the employing agency estimates it will need in the following areas:

TYPE OF LIMITED ASSIGNMENT PERMIT	ESTIMATED NUMBER NEEDED
Multiple Subject	0
Single Subject	0
Special Education	0
TOTAL	0

EFFORTS TO RECRUIT CERTIFIED PERSONNEL

The employing agency declares that it has implemented in policy and practices a process for conducting a diligent search that includes, but is not limited to, distributing job announcements, contacting college and university placement centers, advertising in local newspapers, exploring incentives included in the Teaching as a Priority Block Grant (refer to www.cde.ca.gov for details), participating in state and regional recruitment centers and participating in job fairs in California.

If a suitable fully prepared teacher is not available to the school district, the district made reasonable efforts to recruit an individual for the assignment, in the following order:

- A candidate who qualifies and agrees to participate in an approved internship program in the region of the school district
- An individual who is scheduled to complete initial preparation requirements within six months

EFFORTS TO CERTIFY, ASSIGN, AND DEVELOP FULLY QUALIFIED PERSONNEL

Has your agency established a District Intern program? Yes No

If no, explain. Staff are supported by mentor teachers, department chairs, and the leadership team.

Does your agency participate in a Commission-approved college or university internship program? Yes No

If yes, how many interns do you expect to have this year? 0

If yes, list each college or university with which you participate in an internship program.
N/A

If no, explain why you do not participate in an internship program.
The school has been successful in hiring fully credentialed teachers for all assignments.

EXCEL ACADEMY CHARTER SCHOOLS

Agenda Item: 11.2

Date: January 14, 2021

	Correspondence/Proposals/Reports
	Consent Agenda
	Business/Financial Services
	Education/Student Services
X	Personnel Services
	Curriculum
	Policy Development

Item Requires Board Action: X

Item is for Information Only:

Item: Approve Revision to Job Description (Attachment A - Employee Lease Agreement) - Kurt Madden, Chief Executive Officer

Background:

Staff performed a job analysis of Mr. Madden’s assignment as the Chief Executive Officer for the nonprofit and have made several recommendations for revision of the document to accurately reflect the duties being performed, the knowledge, skills, and abilities needed to perform the duties, and the minimum qualifications for the assignment. In addition to edits to the job description, staff then reviewed the employee lease agreement to ensure alignment of the duties and expectations of the assignment.

As the CEO, Mr. Madden’s primary responsibilities are as follows:

- Program progress and improvement
- Establishing new charters
- Charter expansion /growth
- Human Resources
- Public Relations
- Daily Operations
- Board Meeting agenda development and board support - with advice from the board approved business services provider
- Budget Development and Implementation - with advice from the board approved business services provider
- Marketing - with advice from the board approved business services provider

Upon review of the job description it was determined that statements were included listing duties outside the scope of Mr. Madden’s employment contract and the actual work being performed. Those statements have been recommended for removal. Additionally, statements have been reworded, combined, and reordered to reflect key areas of responsibility, primary focus of the position, and intent of the role of the CEO on behalf of the nonprofit.

It is recommended the Board approve the revisions to the job description for the CEO as presented.

Fiscal Impact:

None

Attachments:

Chief Executive Officer Draft job description



Chief Executive Officer

Job Description

Reports To:	Board of Directors
FLSA Status:	Exempt
School Classification:	Certificated Administration
Pay Range:	\$204,750 to \$261,318
Work Schedule:	225 days
Location:	Onsite/Remote Office

Position Summary

The Chief Executive Officer (CEO) operates under the policy direction of the Board of Directors and in accordance with federal and state laws; facilitates communication to all levels within the schools and organization, the authorizing school districts, state organizations and agencies, and the Board of Directors to ensure compliance with policies and procedures of the Board, as well as local, state and federal rules, regulations, and statutes. The CEO provides guidance and support to the leadership team in shaping the mission, vision, and culture of the organization; fiscal management and compliance; communications; long-term visioning and positioning for school expansion and long-term sustainability of the corporation. Additionally, the CEO is responsible for oversight of the strategic plan of the corporation including the maintenance and growth of current charter schools and the exploration and establishment of new charter school opportunities.

Minimum Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily.

- Master's degree or higher in administration and supervision; advanced degree in educational leadership preferred.
- Have at least five years of successful experience with concentration in organizational leadership, administration, supervision, finance and personnel management; experience in school district leadership highly desirable.
- Experience in developing and executing professional development programs to build leaders and enhance positive culture.

Chief Executive Officer Job Description
Board Approved: April 2020
Revised: DRAFT January 2021

- Experience in the development and execution of organization mission, vision, and core values including the strategic planning, analysis, and evaluation to ensure ongoing organizational growth.
- Hold and maintain a valid California Driver's License; proof of automobile insurance; and full time use of a dependable automobile that is insured pursuant to California regulations.
- State and federal background clearance (LiveScan) to work with students (Education Code Section 44237). No prospective employee can report to work without this clearance being received and Human Resources notifying the immediate supervisor of this clearance.
- Proof of a clear TB test dated within the last 60 days (Education Code Section 49406) upon employment and thereafter updated every four years.

Essential Duties and Responsibilities

Upholding Mission

- Understand and promote the charter school's mission, purposes and objectives to staff, board members, authorizing districts, county offices and professional networks across the State.
- Build shared vision among all stakeholders, focusing on the school's mission, vision, and core values.
- Establish, maintain, and further a healthy and mutually supportive relationship with all staff and educational partners to advance the mission, vision, and core values of the school(s).
- Provide guidance and support to ensure each charter school within The Collaborative enacts its mission, vision, and core values.

Administrative Responsibilities

- Serve as professional advisor to the Board, keeping them fully informed on all programs, practices, issues and aspects of the charter school(s); provide them with all information and data for decision making. When recommendations are requested or offered, the CEO will provide rationale for the recommendation.
- Provide consultation and leadership in designing, implementing, and evaluating major initiatives and/or projects to continuously improve programs and activities.
- Oversee the development of new and revised policies for recommendation to the Board of Directors; ensure all laws, policies, procedures and administrative regulations are communicated and implemented; ensure policies are reviewed regularly for alignment with revisions to laws and best practices.
- Direct, plan and implement policies, objectives and activities of the nonprofit to ensure continuing operations, maximize capacity, internal controls, and resources of the nonprofit to increase engagement and productivity.
- Collaborate with the leadership team and board members to secure legal interpretations on all issues pertaining to the operation of the corporation and the school(s).

- Provide leadership and support to the schools staff in identifying charter needs as the basis for developing long-and short-term plans for the corporation and school(s).
- Guide strategic planning for growth including charter school applications and renewals, personnel, facilities, and programs.
- Keep informed of current educational philosophy, practices and public policies through advanced study, professional networks, attendance at educational conferences and workshops, and by reading current professional literature; provide the Board regular updates to keep them informed of trends in education.
- Participate in, develop, and organize professional development workshops to increase capacity of staff and the organization.
- Maintain good working relationships with the total staff, directing and implementing lines of communication with employees.
- Foster a climate of innovation, collaboration, and creative problem solving with staff, board of directors, and authorizing school districts.

District Liaison

- Promote positive public relations of charter schools and schools within the organization via professional networks, legislative organizations, social media platforms, and in the community; engage in positive public relations activities throughout the State.
- Serve as liaison between the schools and authorizing LEA's; foster open lines of communication through regularly scheduled meetings with superintendents of schools and further the development of professional networks throughout the State.
- Coordinate annual kickoff event for the leadership team of The Collaborative and authorizing LEAs.
- Attend school district administrative meetings and board meetings as requested by the district; maintain direct contact with the District regarding changes, progress, initiatives, etc.

Financial Oversight

- Direct the nonprofit's financial activities to ensure efficient operations, internal controls, fiscal solvency and long-term sustainability.
- Participate in fiscal oversight and planning meetings with each authorizing school district
- Participate in regularly scheduled SELPA CEO council meetings.
- Coordinate the preparation of the annual budget of the school(s) and the presentation to the Board along with facts and pertinent background information relative to its adoption; make recommendations regarding the same and direct the administration of the budget after its adoption.
- Provide oversight, support and guidance on all financial matters such as attendance compliance reporting, purchasing, expense and reimbursements, payroll, and insurance
- Oversee the processing and submission of required state and federal reports and annual audits within mandated deadlines; ensure the facilitation of report submission to districts,

county offices of education and/or the applicable State agency; direct the maintenance of all records that are required by law and board policies.

Compliance and Board Governance

- Ensure compliance with all board policies, corporation bylaws, and applicable state and federal laws.
- Oversee state and federal student assessment requirements; ensure assessments are completed and reported within mandated timeframes.
- Direct staff in the development and timely submission of SARC, LCAP, LCP, and WASC documents; ensure the accuracy of content and fiscal data; facilitate submission and presentation to the appropriate agencies.
- Ensures school leaders take responsible steps to maximize full and regular attendance of students in accordance with policies established by the Board of Directors.
- Coordinate the preparation and presentation of the independent fiscal audit to the Board of Directors, and subsequently present audit to the District Board of Education and the County Superintendent of Schools, the State Controller and the California Department of Education.
- Solicit input from board members in the development of board meeting agendas and study sessions; assure legal requirements are met in scheduling and conducting board meetings.
- Direct the proper maintenance, storage, and access of all records and correspondence of the Board.
- Oversee board member terms of service, facilitate annual organizational meetings; assist in the recruitment of new board members upon member vacancies.
- Conduct onboarding of new board members and facilitate professional development specific to the board member roles and responsibilities.
- Assist in the development of the annual board goals and objectives.

Personnel Oversight

- Upon recommendation from the leadership team, present staff for hiring, retention, discipline, or dismissal to the Board of Directors; ensure decisions adhere with board policy and are supported by accurate and adequate records.
- Encourage, create and support ongoing staff professional development.
- Support leadership in their supervision and evaluation of personnel; assist in conflict resolution as needed.
- Ensure staff evaluation cycles are completed and conducted in compliance with board policy to maximize the corporation's mission, vision, and core values.
- Oversee development of staffing plans and position control in alignment with approved budgets; monitor staffing levels in coordination with changes in State and federal revenue levels; assist leadership in forecasting staffing needs in anticipation of increase of student enrollment.

Supervision and Oversight Responsibilities

- Supervises, coordinates, and evaluates assigned staff.
- Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws.

Other Duties

- Document and report to the Board of Directors all formal disciplinary actions involving students and staff; addressing and resolving complaints from students, parents, and staff in a timely manner; ensuring compliance with the school's Uniform Complaint Policy; the school's Uniform Technology Policy; and the provisions of California Penal Code Section 11166 (Child Abuse and Neglect Reporting Act).
- Perform other duties as assigned.

Knowledge and Abilities

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Knowledge of

- Business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership techniques and coordination of people and resources
- Applicable laws, codes, regulations, policies and procedures
- Compliance review mandates
- Budget preparation and control
- Principles and procedures for personnel recruitment, selection, training, compensation and benefits, evaluation, and maintenance of records
- Principles and processes for providing customer service, needs assessment, quality standards and evaluation
- Oral and written communication skills
- Interpersonal skills using tact, patience and courtesy
- Public speaking techniques

Ability to

- Communicate effectively both orally and in writing
- Interpret, apply and explain rules, regulations, policies and procedures
- Establish and maintain cooperative and effective working relations with others
- Analyze situations accurately and adopt an effective course of action
- Meet schedules and timelines
- Implement strategic plans, evaluate procedures, and ensure effective communication with stakeholders

- Read and interpret fiscal reports, forecast budgetary needs, research options and make recommendations
- Prepare comprehensive narrative and statistical reports, memorandums, evaluations and correspondence
- Act as a mediator and develop improvement plans as appropriate
- Direct the maintenance of a variety of reports and files related to assigned activities
- Maintain current knowledge of legislation related to assigned areas
- Protect and maintain confidentiality, privacy and security of staff, business, and other confidential, sensitive electronic or proprietary information

Reasoning Ability

- Consider relative costs and benefits of potential actions, develop options, and select or recommend the most appropriate course of action
- Analyze problems, collect data, establish facts, and draw valid conclusions
- Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables

Use of Computer Technology

To perform this job successfully, an individual should have general knowledge of database software, how to use the Internet to find information and complete tasks, email usage, order processing systems, spreadsheet software, and word processing software.

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Hearing and speaking to exchange information
- Dexterity of hands and fingers to demonstrate activities
- Operates a computer and other office productivity machinery
- Seeing to read a variety of materials and monitor students
- Bending at the waist, kneeling or crouching
- Sitting or standing for extended periods of time
- Lifting objects up to 25 pounds with or without assistance
- Close vision and ability to adjust focus
- Driving a vehicle to participate in a variety of meetings.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Noise level is generally moderate
- Meetings conducted in public and private settings
- Indoor and outdoor in varying temperature
- Employee must have available transportation and be able to drive up to 100 miles in a day

Hazards

Contact with dissatisfied individuals.

Employee Acknowledgement

The above job description is not intended to be an all-inclusive list of duties and standards of the position. Incumbents will follow any other instructions, and perform any other related duties, as assigned by their supervisor.

Employee Signature

Printed Name

Date

Chief Executive Officer

Job Description

Reports To:	Board of Directors
FLSA Status:	Exempt
School Classification:	Certificated Administration
Pay Range:	\$204,750 to \$261,318
Work Schedule:	225 days
Location:	Onsite/Remote Office

Position Summary

The Chief Executive Officer (CEO) operates under the policy direction of the Board of Directors and in accordance with federal and state laws; providing direction to the leadership team in developing, formulating and revising guidance documents in school finance, school program planning and educational program review. The CEO has the authority to specify actions required and to detail how the school will operate. Work is accomplished by providing leadership to the Board of Directors, school employees and members of the community, and by system management that recognizes the need to achieve student, staff and board goals, as well as system improvement plans and objectives.

Communications are provided to all levels within the schools and organization, the community served by the school and state organizations and agencies, and Board of Directors. Each of the programs must be conducted in compliance with policies and procedures of the Board, as well as state rules and regulations and state and federal statutes.

Minimum Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily.

- Master's Degree and Education Specialist (Ed. S) degree or higher in administration and supervision or educational leadership preferred.
- Have at least five years of successful teaching and five years of educational administration experience with concentration in administration, supervision, curriculum, finance and personnel management.
- A valid, current, and appropriate California state administrative credential. A copy of credential to be provided and kept current.
- Hold and maintain a valid California Driver's License; proof of automobile insurance; and full time use of a dependable automobile that is insured pursuant to California regulations.
- State and federal background clearance (LiveScan) to work with students (Education Code Section 44237). No prospective employee can report to work without this clearance being received and Human Resources notifying the immediate supervisor of this clearance.
- Proof of a clear TB test dated within the last 60 days (Education Code Section 49406) upon employment and thereafter updated every four years.

Essential Duties and Responsibilities

Upholding Mission

- Understand and promote the charter's mission, purposes and objectives to parents, staff, board members, and community.
- Build shared vision among all stakeholders, focusing on the program's mission and identity.
- Establish and maintain a healthy and mutually supportive relationship with our partners to advance the mission of the schools.
- Ensure each charter school within The Collaborative enacts its mission.

Administrative Responsibilities

- Develop new and revised policies for recommendation to the Board and ensure that all laws, policies, procedures and administrative regulations are implemented.
- Make administrative decisions necessary for the proper functioning of the schools.
- Secure legal interpretations on all issues pertaining to the operation of the schools.
- Create and oversee systems to handle organizational tasks such as student records, teacher records, purchasing, budgets, and timetables.
- Serve as professional advisor to the Board, keeping them fully informed on all programs, practices, issues and problems of the charter school; provide them with all information and data for decision making. When recommendations are requested or offered, the CEO will provide rationale for the recommendation.
- Provide leadership in designing, implementing, and evaluating major programs and activities to bring about needed change and higher performance.
- Provide leadership and support to the schools staff in determining instructional objectives and identifying charter needs as the basis for developing long-and short-range plans for the charter.
- Continuously develop and expand the educational goals and programs, and inform the Board of status, progress, and implementation.
- Keep informed of current educational philosophy, practices and public policies by advanced study, by visiting other charters, by attending educational conferences and workshops, and by reading current professional literature. Keep the Board informed of trends in education.
- Complete and submit required documents as requested or required by the charter and/or the Board of Directors and/or the District and associated County Office of Education.
- Participate in and develop professional development workshops as needed.
- Maintain good working relationships with the total staff, directing and implementing lines of communication with employees.
- Foster a climate of innovation and collaborative creative problem solving with charter personnel, students, parents, and community.
- Establish and maintain a system to handle organizational tasks such as student records, teacher records, teacher credentialing information, contemporaneous attendance logs, purchasing, budgets, and timetables.
- Work with the schools' staff to develop the annual school calendar and Master Schedule.

District Liaison

- Serve as liaison between the schools and authorizing LEA's on all educational matters; coordinate with legal counsel on contracts with contractors.
- Maintain communication and strong relationships with existing LEA's.
- Network with LEA Superintendents of Schools throughout the state.
- Attend District administrative meetings as requested by the District and stay in direct contact with the District regarding changes, progress, etc.
- Provide monthly progress reports to districts.
- Attend board meetings of districts, as needed.
- Promote positive public relations of charter schools and schools within the organization via social media platforms and in the community; interact effectively with media.

Financial Oversight – working with back-office provider

- Oversee school finances to ensure financial stability; maintain up-to-date financial records.
- Attend meetings with the Chief Financial Officer of each District on fiscal oversight issues as requested by the District.
- Direct the preparation of the annual budget of the schools, presenting it to the Board along with facts and pertinent information relative to its adoption; make recommendations regarding the same and direct the administration of the budget after its adoption.
- Provide all necessary financial reports as required for proper attendance reporting.
- With Board direction, follow Board-approved procedures for purchasing materials; provide explanation to the Board of departure from established procedures.
- Oversee reimbursements and expenses.
- Oversee the processing and submission of required state and federal reports. Direct the maintenance of all records that are required by law and board policies.

Provider/Systems Liaison

- Provide support with the marketing to recruit new families and students.
- Organize efforts for RFPs to various providers.
- Serve as liaison between the schools and school providers on all educational matters to ensure providers are adhering to contracts and quality of services.
- Collaborate with the schools' legal counsel on contracts with contractors/providers.

Legal Compliance

- Ensure compliance with all applicable state and federal laws.
- Oversee state and federal assessment requirements.
- Oversee the development of SARC, LCAP, and WASC documents.
- Present independent fiscal audit to the Board of Directors, and subsequently present audit to the District Board of Education and the County Superintendent of Schools, the State Controller and the California Department of Education.

- Prepare/coordinate the agenda for all board meetings, all records and correspondence of the Board, and assure legal requirements are met in scheduling and conducting board meetings.
- Oversee the processing and submission of required State and federal reports. Direct the maintenance of all records that are required by law and board policies.
- Oversee and assist in securing local grants.

Faculty Oversight

- Support leadership in the supervision and evaluation of non-teaching personnel (counselors, assessment coordinator, etc.).
- Encourage, create and support teacher professional development.
- Oversee non-teaching personnel development and progress of SMART goals.
- Direct the evaluation and make all recommendations for retention, discipline, or dismissal of employees, supported by accurate and adequate records.
- Interview and recommend employee hiring, promotion, discipline, and/or dismissal.
- Ensure that appropriate evaluation techniques are used for both students and staff.
- Support with the identification of the staffing needs of the schools based on the budget and ADA and direct the assignment/duties for instructional personnel.
- Monitor student completion rates; support leadership in analysis and development of action steps for improvement.
- Support and guide the preparation of reports showing objectives, plans, programs, and educational accomplishments.

Attendance Compliance

- Provide all necessary financial reports as required for proper attendance reporting.
- Ensures school leaders take responsible steps to maximize full and regular attendance of students in accordance with policies established by the Board of Directors.

Supervision and Oversight Responsibilities

Supervises, coordinates, and evaluates assigned staff. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws.

- Cabinet members
- School directors
- Director of Charter Operations
- Executive Assistant
- Other administrative staff as assigned

Other Duties

- Document and report to the school's management all formal disciplinary actions involving students and staff; addressing and resolving complaints from students, parents, and staff in a timely manner; ensuring compliance with the school's Uniform Complaint Policy; the school's

Uniform Technology Policy; and the provisions of California Penal Code Section 11166 (Child Abuse and Neglect Reporting Act).

- Perform other duties as assigned.

Language Skills

- Ability to read, write and interpret documents such as curriculum guides, test results, contracts, grant applications, statutes and policies.
- Ability to understand and generate written memorandums, employee evaluations and correspondence with business and public contacts.
- Ability to write routine reports and correspondence.
- Ability to speak effectively to individuals and groups.
- Ability to effectively present information and respond to questions from parents, staff, students and the general public.
- Ability to navigate the WASC accreditation and LCAP process to a successful conclusion.

Mathematical Skills

- Ability to calculate figures and amounts such as discounts, interest, proportions, percentages.
- Ability to apply concepts of basic algebra and geometry.
- Experience in working with and preparing budgets.
- The ability to read and interpret fiscal reports.

Reasoning Ability

- Analyze problems, collect data, establish facts, and draw valid conclusions.
- Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

Use of Computer Technology

To perform this job successfully, an individual should have general knowledge of database software, how to use the Internet to find information and complete tasks, email usage, order processing systems, spreadsheet software, and word processing software.

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Hearing and speaking to exchange information
- Dexterity of hands and fingers to demonstrate activities
- Operates a computer and other office productivity machinery
- Seeing to read a variety of materials and monitor students
- Bending at the waist, kneeling or crouching
- Sitting or standing for extended periods of time
- Lifting objects up to 25 pounds with or without assistance

- Close vision and ability to adjust focus
- Driving a vehicle to participate in a variety of meetings.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Noise level is generally moderate
- Meetings conducted in public and private settings
- Indoor and outdoor in varying temperature
- Employee must have available transportation and be able to drive up to 100 miles in a day

Hazards

Contact with dissatisfied individuals.

Employee Acknowledgement

The above job description is not intended to be an all-inclusive list of duties and standards of the position. Incumbents will follow any other instructions, and perform any other related duties, as assigned by their supervisor.

Employee Signature

Printed Name

Date

EXCEL ACADEMY CHARTER SCHOOLS

Agenda Item: 12.1

Date: January 14, 2021

	Correspondence/Proposals/Reports
	Consent Agenda
	Business/Financial Services
	Education/Student Services
	Personnel Services
	Curriculum
X	Policy Development

Item Requires Board Action: X

Item is for Information Only: _____

Item: Approval of new board policy for the 2020-2021 school year.

Background:

In order to ensure adherence with State and federal laws related to community relations, it is recommended the Board approve the following policies as presented.

NEW

1000 Series - Community Relations

1035 Access to Public Records Policy

The California Pacific Charter School Board of Directors recognizes the right of citizens to have access to public records. The Board intends for schools to provide any person reasonable access to the public records during normal business hours and within the requirements of state and federal law. This policy outlines the timeframes and procedures for making a request for public records to the school.

It is recommended the Board approve the new board policy for the 2020-2021 school year.

Fiscal Impact: None.

ACCESS TO PUBLIC RECORDS POLICY

The Excel Academy Charter School Board of Directors recognizes the right of citizens to have access to public records. The Board intends for schools to provide any person reasonable access to the public records during normal business hours and within the requirements of state and federal law. Such records shall be examined in the presence of the staff member regularly responsible for their maintenance.

Requests for public records shall be made to the office of the Executive Director. The Executive Director or designee may then determine the most appropriate employee of Excel Academy Charter Schools (“EACS”) to assist in assembling any public records for production.

Any person may request a copy of any public record open to the public and not exempt from disclosure. Public access shall not be given to records listed as exempt from public disclosure in the California Public Records Act or other applicable statutes. While a request need not be in writing, if the request is verbal, the requestor will be asked to reduce the request to writing so there is a written record of the records being requested. If the requestor chooses not to reduce the request to writing, the Executive Director or designee shall reduce the request to writing and confirm the request with the requestor. The request for public records must clearly identify the records requested, along with the name and mailing address of the requestor.

If the Executive Director or designee denies a request for disclosable records, he/she shall assist the requester in making a focused and effective request that reasonably describes an identifiable record. To the extent reasonable under the circumstances, the Executive Director or designee shall do all of the following: (Government Code 6253.1)

1. Assist in identifying records and information responsive to the request or the purpose of the request, if specified

If after making a reasonable effort to elicit additional clarifying information from the requester to help identify the record, the Executive Director or designee is still unable to identify the information, this requirement will be deemed satisfied.

2. Describe the information technology and physical location in which the records exist
3. Provide suggestions for overcoming any practical basis for denying access to the records or information sought

Provisions of the California Public Records Act (Government Code Section 6250 *et seq.*) shall not be construed so as to delay access for purposes of inspecting or receiving copies of records open to the public. Any notification denying a request for public records shall state the name and title of each person responsible for the denial.

EACS may charge for copies of public records or other materials requested by individuals or groups. The charge, based on the direct cost of duplication, has been set by the Board of

ACCESS TO PUBLIC RECORDS POLICY

Directors at \$.10 per page. The direct cost of duplication includes the pro rata expense of the copying equipment used and the pro rata expense in terms of staff time required to produce the copy. It does **not** include the cost of locating, retrieving, or inspecting records.

When a request requires data compilation, the Requestor shall bear the cost of producing a copy of the record, including the cost to construct a record, and the cost of programming and computer services. The Requestor shall also bear the direct cost if unique software is needed to process the request. Respondent will provide an estimated cost for the request to the Requestor and will follow-up with an itemization of the actual costs when actual costs are determined.

Requests to waive associated fees related to the direct cost of duplication shall be submitted to the Executive Director's Office.

In response to a request for public records sent or received on an employee's personal devices or accounts, EACS shall disclose all public records that can be located with reasonable effort and that are otherwise subject to disclosure under the California Public Records Act. EACS's search for such public records shall be reasonably calculated to locate responsive documents. To fulfill such a request for public records, employees of EACS may be asked to search for and disclose all responsive disclosable public records maintained on the employee's personal devices or accounts.

Within ten (10) days of receiving any request for a copy of records, the Executive Director or designee shall determine whether the request seeks copies of disclosable public records in the possession of EACS, shall promptly inform the person making the request of EACS's intent to comply with the request, and shall indicate the date that the disclosable public records shall be made available.

In unusual circumstances, the Executive Director may extend the 10-day time period for an additional 14 days by providing written notice to the requestor and setting forth the reasons for the extension and the date on which a determination is expected to be made. Unusual circumstances include, but only to the extent reasonably necessary to properly process the request, the following:

1. The need to search for and collect the requested records from field facilities or other locations that are separate from the office processing the request;
2. The need to search for, collect, and appropriately examine a voluminous amount of separate and distinct records that are demanded in a single request;
3. The need for consultation, which shall be conducted with all practicable speed, with another agency having a substantial interest in the determination of the request, or among two or more components of EACS having substantial subject matter interest therein;

ACCESS TO PUBLIC RECORDS POLICY

4. The need to compile data, to write programming language or a computer program, or to construct a computer report to extract data.

If an inspection is requested, any person shall have reasonable access, at a mutually agreeable time, during normal business hours, to the public records of Excel Academy Charter Schools within the requirements of state law. However, if records are not readily available, or if portions of the records to be inspected must be redacted to protect exempt material, then Excel Academy Charter Schools must be given a reasonable period of time to perform these functions prior to inspection. Such records shall be examined in the presence of the staff member regularly responsible for their maintenance.

FAMILY AND MEDICAL LEAVE ACT AND CALIFORNIA FAMILY RIGHTS ACT POLICY

Excel Academy Charter Schools (“EACS” or the “School”) complies with the federal Family and Medical Leave Act (“FMLA”) and the California Family Rights Act (“CFRA”), both of which require the School to permit each eligible employee to take up to twelve (12) workweeks, or twenty-six (26) workweeks where indicated, of FMLA and/or CFRA leave in any twelve (12) month period for the purposes enumerated below.

EMPLOYEE ELIGIBILITY CRITERIA

To be eligible for FMLA/CFRA leave, the employee must have been employed by the School for at least twelve (12) months, worked at least 1,250 hours during the twelve (12) month period immediately preceding the commencement of FMLA/CFRA leave, and work at a location where the School has at least fifty (50) employees within a seventy-five (75) mile radius, except for purposes of CFRA where the threshold is five (5) employees.

EVENTS THAT MAY ENTITLE AN EMPLOYEE TO FMLA/CFRA LEAVE

Any leave taken (with or without pay) by the employee for any of the following reasons:

1. To bond with the employee’s newborn child or a child placed with the employee for adoption or foster care within one (1) year of the birth, adoption, or placement of a child under age eighteen (18) with the employee. Under FMLA, if both parents are employed by the School, the leave is shared between the parents and will be granted in the order requested. Under CFRA, if both parents are employed by the School, each parent of the child will be granted up to 12 weeks of leave.
2. Due to the employee’s own serious health condition causing the employee to be unable to perform one or more of the essential functions of their job. This excludes a disability caused by pregnancy, childbirth, or related medical conditions, as they are covered by the School’s pregnancy disability policy.
 - a. A “serious health condition” is an illness, injury (including those occurring in the workplace), impairment, or physical or mental condition of the employee or a child, parent, or spouse of the employee that involves either inpatient care or continuing treatment, including, but not limited to, treatment for substance abuse.
 - b. “Inpatient care” means a stay in a hospital, hospice, or residential health care facility, any subsequent treatment in connection with such inpatient care, or any period of incapacity. A person is considered “inpatient” when a health care facility formally admits them to the facility with the expectation that they will

FAMILY AND MEDICAL LEAVE ACT AND CALIFORNIA FAMILY RIGHTS ACT POLICY

remain at least overnight and occupy a bed, even if it later develops that such person can be discharged or transferred to another facility and does not actually remain overnight.

- c. “Incapacity” means the inability to work, attend school, or perform other regular daily activities due to a serious health condition, its treatment, or the recovery that it requires.
 - d. “Continuing treatment” means ongoing medical treatment or supervision by a health care provider.
3. To care for a qualifying family member
 - a. FMLA: Includes a spouse, child under the age of 18, or parent with a serious health condition or military service-related injury.
 - b. CFRA: Includes a spouse or domestic partner, child, parent, grandparent, grandchild, or sibling.
 4. For any “qualifying exigency” because the employee is the spouse, child, or parent of an individual on active military duty, or an individual notified of an impending call or order to active duty in the Armed Forces.

AMOUNT OF FMLA/CFRA LEAVE WHICH MAY BE TAKEN

1. FMLA/CFRA leave can be taken in one (1) or more periods, but may not exceed twelve (12) workweeks total for any purpose in any twelve (12) month period, as described below, for any one, or combination of, the above-described situations. “Twelve workweeks” means the equivalent of twelve (12) of the employee’s normally scheduled workweeks. For a full-time employee who works five (5) eight-hour days per week, “twelve workweeks” means sixty (60) working, and/or paid, eight (8) hour days.
2. In addition to the twelve (12) workweeks of FMLA/CFRA leave that may be taken, an employee who is the spouse, child, parent, or next of kin of a covered Armed Forces service member shall also be entitled to a total of twenty-six (26) workweeks of FMLA leave during a twelve (12) month period to care for the service member.
3. The “twelve month period” in which twelve (12) weeks of FMLA/CFRA leave may be taken is the twelve (12) month period immediately preceding the commencement of any FMLA/CFRA leave. 4. If a holiday falls within a week taken as FMLA/CFRA leave, the week is nevertheless counted as a week of FMLA/CFRA leave. If, however, the School’s business activity has temporarily ceased for some reason and employees are generally not expected to report to work for one or more weeks, such as the Winter Break, Spring

FAMILY AND MEDICAL LEAVE ACT AND CALIFORNIA FAMILY RIGHTS ACT POLICY

Break, or Summer Vacation, the days the School's activities have ceased do not count against the employee's FMLA/CFRA leave entitlement. Similarly, if an employee uses FMLA/CFRA leave in increments of less than one (1) week, the fact that a holiday may occur within a week in which an employee partially takes leave does not count against the employee's leave entitlement unless the employee was otherwise scheduled and expected to work during the holiday.

4. Intermittent FMLA/CFRA Leave may be taken when the leave is for the serious health condition of the employee or the employee's immediate family member as defined in this policy. Intermittent leave for the birth of a child or placement of a child for adoption or foster care must be pre-approved by the supervisor and or designee. Intermittent leave may be taken in no less than thirty (30) minute increments.

PAY DURING FMLA/CFRA LEAVE

1. An employee on FMLA/CFRA leave must use all accrued paid sick leave at the beginning of any otherwise unpaid FMLA/CFRA leave period. If an employee is receiving a partial wage replacement benefit during the FMLA/CFRA leave, the School and the employee may agree to have School-provided paid leave, such as vacation or sick time, supplement the partial wage replacement benefit unless otherwise prohibited by law.
2. An employee on FMLA leave for child care, or to care for a spouse, domestic partner, parent, or child with a serious health condition, may use any or all accrued sick leave at the beginning of any otherwise unpaid FMLA leave.
3. If an employee has exhausted their sick leave, leave taken under FMLA/CFRA shall be unpaid leave.
4. The receipt of sick leave pay or State Disability Insurance benefits will not extend the length of the FMLA/CFRA leave. Sick pay will accrue during any period of unpaid FMLA/CFRA leave only until the end of the pay period in which unpaid leave began.

HEALTH BENEFITS

The provisions of the School's various employee benefit plans govern continuing eligibility during FMLA/CFRA leave and these provisions may change from time to time. The health benefits of employees on FMLA/CFRA leave will be paid by the School during the leave at the same level and under the same conditions as coverage would have been provided if the employee

FAMILY AND MEDICAL LEAVE ACT AND CALIFORNIA FAMILY RIGHTS ACT POLICY

had been continuously employed during the leave period. When a request for FMLA/CFRA leave is granted, the School will give the employee written confirmation of the arrangements made for the payment of insurance premiums during the leave period. If an employee is required to pay premiums for any part of their group health coverage, the School will provide the employee with advance written notice of the terms and conditions under which premium payments must be made. The School may recover the health benefit costs paid on behalf of an employee during their FMLA/CFRA leave if:

1. The employee fails to return from leave after the period of leave to which the employee is entitled has expired. An employee is deemed to have “failed to return from leave” if they work less than thirty (30) days after returning from FMLA/CFRA leave; and
2. The employee’s failure to return from leave is for a reason other than the continuation, recurrence, or onset of a serious health condition that entitles the employee to FMLA/CFRA leave, or other circumstances beyond the control of the employee.

SENIORITY

An employee on FMLA/CFRA leave remains an employee and the leave will not constitute a break in service. An employee who returns from FMLA/CFRA leave will return with the same seniority they had when the leave commenced.

MEDICAL CERTIFICATIONS

1. An employee requesting FMLA/CFRA leave because of their own, or a qualifying family member’s serious health condition must provide medical certification from the appropriate health care provider on a form supplied by the School. Absent extenuating circumstances, failure to provide the required certification in a timely manner (within fifteen [15] days of the School’s request for certification) may result in denial of the leave request until such certification is provided.
2. The School will notify the employee in writing if the certification is incomplete or insufficient and will advise the employee what additional information is necessary in order to make the certification complete and sufficient. The School may contact the employee’s health care provider to authenticate a certification, as needed.
3. If the School has reason to doubt the medical certification supporting a leave because of the employee’s own serious health condition, the School may request a second opinion by a health care provider of its choice (paid for by the School). If the second opinion differs

FAMILY AND MEDICAL LEAVE ACT AND CALIFORNIA FAMILY RIGHTS ACT POLICY

from the first one, the School will pay for a third, mutually agreeable health care provider to provide a final and binding opinion.

4. Recertifications are required if leave is sought after expiration of the time estimated by the health care provider. Failure to submit required recertifications can result in termination of the leave.

PROCEDURES FOR REQUESTING AND SCHEDULING FMLA/CFRA LEAVE

1. An employee should request FMLA/CFRA leave by completing a Request for Leave form and submitting it to Human Resources. An employee asking for a Request for Leave form will be given a copy of the School's then-current FMLA/CFRA leave policy.
2. Employees should provide not less than thirty (30) days' notice for foreseeable childbirth, placement, or any planned medical treatment for the employee or eligible family member. Failure to provide such notice is grounds for denial of a leave request, except if the need for FMLA/CFRA leave was an emergency or was otherwise unforeseeable.
3. Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt the School's operations.
4. If FMLA/CFRA leave is taken because of the employee's own serious health condition or the serious health condition of an eligible family member, the leave may be taken intermittently or on a reduced leave schedule when medically necessary, as determined by the health care provider of the person with the serious health condition and based on FMLA/CFRA leave eligibility.
5. If FMLA/CFRA leave is taken because of the birth of the employee's child or the placement of a child with the employee for adoption or foster care, the minimum duration of leave is two (2) weeks, except that the School will grant a request for FMLA/CFRA leave for this purpose of at least one day but less than two (2) weeks' duration on any two (2) occasions.
6. If an employee needs intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment for the employee or a eligible family member, the employee may be transferred temporarily to an available alternative position, for which they are qualified, that has equivalent pay and benefits and better accommodates recurring periods of leave than the employee's regular position.

FAMILY AND MEDICAL LEAVE ACT AND CALIFORNIA FAMILY RIGHTS ACT POLICY

7. The School will respond to an FMLA/CFRA leave request no later than five (5) business days of receiving the request. If an FMLA/CFRA leave request is granted, the School will notify the employee in writing that the leave will be counted against the employee's FMLA/CFRA leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

RETURN TO WORK

1. Upon timely return at the expiration of the FMLA/CFRA leave period, an employee (other than a "key" employee whose reinstatement would cause serious and grievous injury to the School's operations, if under FMLA leave only) is entitled to the same or a comparable position with the same or similar duties and virtually identical pay, benefits, and other terms and conditions of employment, unless the same position and any comparable position(s) have ceased to exist because of legitimate business reasons unrelated to the employee's FMLA/CFRA leave.
2. When a request for FMLA/CFRA leave is granted to an employee (other than a "key" employee under FMLA leave), the School will give the employee a written guarantee of reinstatement at the termination of the leave (with the limitations explained above).
3. Before an employee will be permitted to return from FMLA/CFRA leave taken because of their own serious health condition, the employee must obtain a certification from their health care provider that they are able to resume work.
4. If an employee can return to work with limitations, the School will evaluate those limitations and, if possible, will accommodate the employee as required by law. If accommodation cannot be made, the employee will be medically separated from the School.

LIMITATIONS ON REINSTATEMENT UNDER FMLA LEAVE ONLY

1. The School may refuse to reinstate a "key" employee if the refusal is necessary to prevent substantial and grievous injury to the School's operations. A "key" employee is an exempt salaried employee who is among the highest paid 10% of the School's employees within seventy-five (75) miles of the employee's worksite.
2. A "key" employee will be advised in writing at the time of a request for or, if earlier, at the time of commencement of, FMLA leave, that they qualify as a "key" employee and the potential consequences, with respect to reinstatement and maintenance of health

FAMILY AND MEDICAL LEAVE ACT AND CALIFORNIA FAMILY RIGHTS ACT POLICY

benefits, if the School determines that substantial and grievous injury to the School's operations will result if the employee is reinstated from FMLA leave. At the time it determines that refusal is necessary, the School will notify the "key" employee in writing (by certified mail) of its intent to refuse reinstatement and will explain the basis for finding that the employee's reinstatement would cause the School to suffer substantial and grievous injury. If the School realizes after the leave has commenced that refusal of reinstatement is necessary, it will give the employee at least ten (10) days to return to work following the notice of its intent to refuse reinstatement.

EMPLOYMENT DURING LEAVE

No employee, including employees on FMLA/CFRA leave, may accept employment with any other employer without the School's written permission. An employee who accepts such employment without the School's written permission will be deemed to have resigned from employment at the School.