



Bridges Charter School

Board Meeting

Date and Time

Wednesday May 20, 2026 at 1:00 PM PDT

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Wednesday May 20, 2026 at 1:00 PM PDT

Location

ONSITE MEETING LOCATION

Bridges Charter School
1335 Calle Bouganvilla, Thousand Oaks, CA 91360

SATELLITE MEETING LOCATIONS

(required for board members joining remotely)

In Ventura County:

Outside Ventura County"

Community Members may choose to join in-person or via Zoom Meeting at:

Join Zoom Meeting

<https://us02web.zoom.us/j/7670961601?pwd=eWkycUxoalo1NGJBdE5lSlh3Rk5GZz09>

Meeting ID: 767 096 1601

Passcode: 477881

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Community members wishing to speak publicly must be present at the board meeting in person.

Agenda

		Purpose	Presenter	Time
I.	Opening Items			1:00 PM
	A. Record Attendance			1 m
	B. Call the Meeting to Order			
	C. Approve Minutes	Approve Minutes	Katerina Yevmenkina	1 m
	Approve minutes for Board Meeting on April 20, 2026			
II.	Presentations			1:02 PM
	A. LCAP Public Hearing	Discuss	Kelly Simon	10 m
	Pursuant to California Education Code Section 52062, the Board will open a public hearing to receive community input on Bridges Charter School's Local Control and Accountability Plan (LCAP). This hearing provides an opportunity for parents, students, staff, and community members to comment on the school's goals, actions, and services prior to Board adoption.			

The Board will receive public comment on two related items: (1) the Annual Update to the 2025–26 LCAP, reflecting progress on current year goals and expenditures; and

	Purpose	Presenter	Time
<p>(2) the proposed 2026–27 LCAP, which represents the third and final year of the current three-year cycle.</p>			

Both documents reflect Bridges Charter School's commitment to improving outcomes for all students, with targeted support for high-need student groups in alignment with Local Control Funding Formula (LCFF) priorities.

All members of the public are encouraged to attend and provide input.

III. Public Comments

Persons wishing to address the Board may do so at this time upon recognition from the President, or when the President requests comments from the Public as the Board is considering the item. Please state your name, community or organization you represent, and the topic you wish to share with the Board. You will be given 3 minutes to make your presentation. Pursuant to the Brown Act, the Board cannot enter into formal discussion with individuals making public comments to the Board. The Board cannot take action on any issues raised during public comments that are not on the meeting agenda. Individual members may respond to public comments during the individual Board Members section.

IV. Reports 1:12 PM

<p>A. Directors Report Executive Director</p> <ul style="list-style-type: none"> • Open House and Art Night • Welcome new staff 	<p>Discuss</p>	<p>Kelly Simon</p>	<p>5 m</p>
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V. Consent Items 1:17 PM

<p>A. Consent Items</p>	<p>Vote</p>	<p>Katerina Yevmenkina</p>	<p>3 m</p>
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Consent Items: Items proposed for the consent calendar are noted on the posted agenda and are considered by the Director to be of a routine nature. Any item may be removed from the consent calendar at the request of any Board member and placed under the appropriate action category. A vote will be taken for the consent calendar so that any items requiring a vote can be properly addressed. It is recommended that all consent items be approved.

	Purpose	Presenter	Time
6.1	Financial Reports		
6.1.1	Checks		
6.1.2	Financial Statements		
6.1.3	Purchase Orders		
6.1.4	Amazon Purchases		
6.2	Personnel Report		

VI. Governing Board

1:20 PM

- | | | | | |
|-----------|---|-----|-------------|-----|
| A. | Candidate Presentations -- Board of Directors Appointment Process (BP 9221) | FYI | Kelly Simon | 5 m |
|-----------|---|-----|-------------|-----|

In accordance with Board Policy 9221, incumbent Board Members Katerina Yevmenkina and Nikki Hashemi are seeking re-appointment to the Bridges Charter School Board of Directors. Each candidate will be allotted time to share why they wish to continue serving on the Board. The Board will formally designate directors for appointment at the June 15, 2026 Regular Board Meeting.

- | | | | | |
|-----------|--|------|-------------|-----|
| B. | Certificate of Amendment of Bridges Articles of Incorporation replacing Article VI | Vote | Kelly Simon | 5 m |
|-----------|--|------|-------------|-----|

The board is asked to receive and approve the amended Articles of Incorporation as the current governing document of Bridges Charter School, and to direct administration to retain the file-stamped copy in the corporation's official records and provide a copy to CalSTRS as required.

For review are:

Amended Bylaws
 Certificate of Amendment of Article of Incorporation
 Form 0765

When approved, Administration will proceed with submission of CalSTRS Form 0765 via the employer portal prior to the June 30, 2026 deadline.

Approval of this item is recommended.

	Purpose	Presenter	Time
VII. Charter Policies			1:30 PM
A. BP 3320: Investments	Vote	Kelly Simon	5 m
<p>The Investment Policy establishes the objectives and guidelines governing the management of the School's funds, with priorities of preservation of principal, liquidity, and yield.</p> <p>Board discussion and input is invited; approval is recommended</p>			
B. Replacement Policy: BP 5141.2 Extreme Weather Conditions	Vote	Kelly Simon	5 m
<p>This policy is adopted pursuant to the requirement under California law that public schools, including charter schools, adopt protocols for addressing extreme weather conditions by July 1, 2026. This policy replaces BP 5141.2 Hot Weather Conditions (adopted 10/23/17) and expands its scope to address all forms of extreme weather. Approval of this item is recommended</p>			
C. Addendum to Comprehensive School Safety Plan — Refuge Shelter Identification Procedure (AB 2968)	Vote	Kelly Simon	5 m
<p>AB 2968 (Chapter 589, Statutes of 2024) amends Education Code Section 32282 to require all public schools, including charter schools, to establish a written procedure identifying an appropriate refuge shelter for all pupils and staff in the event of an evacuation order by local authorities, commencing with the 2026–2027 fiscal year. This requirement applies to all schools regardless of fire hazard severity zone designation.</p> <p>Administration has developed an addendum to the BCS 2025–2026 Comprehensive School Safety Plan designating Conejo Creek North Park (1379 E Janss Road, Thousand Oaks) as the school's primary refuge shelter. The park was selected because it is a publicly accessible open space open during all school hours, located approximately 1.5 miles from campus, with public restrooms, ample parking for parent reunification, and ADA accessibility. As a public park managed by the Conejo Recreation and Park District, it requires no private access agreement.</p> <p>The addendum also includes a step-by-step evacuation procedure, student reunification protocols, disability accommodations, and a provision for the required annual notification to the Ventura County Fire Department.</p>			

	Purpose	Presenter	Time
<p>Approval of this addendum is recommended; following approval, the Executive Director will notify the Ventura County Fire Department of the designated refuge shelter location as required by AB 2968.</p>			

VIII. Business and Operations 1:45 PM

<p>A. Resolution: Authorization to Open Investment Account with Westlake Private Wealth Management</p>	Vote	Kelly Simon	5 m
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Contingent upon adoption of the Bridges Charter School Investment Policy, the Board of Directors will consider a resolution authorizing the opening of an investment account with Westlake Private Wealth Management, a fiduciary financial advisory practice operating through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. The resolution designates authorized signers and establishes the scope of authority for management of the account on behalf of Bridges Charter School.

<p>B. SY 26-27 Employee Handbook (Draft) Approval of this item is recommended</p>	Vote	Cindy McCarthy	5 m
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<p>C. Quote for STS Approval of this item is recommended</p>	Vote	Cindy McCarthy	5 m
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<p>D. Rivers of Council-Topa field trip Approval of this item is recommended</p>	Vote	Skye Stifel	5 m
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<p>E. Local Assignment Option Approval of this item is recommended</p>	Vote	Cindy McCarthy	5 m
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<p>F. April Financials and Budget Overview with Preliminary Budget and May Revise Insights</p>	FYI	Kelly Simon	5 m
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Dr. Simon will present the April financial statements, providing the Board with an updated picture of Bridges' year-to-date revenue and expenditures relative to the adopted budget. This report will include a review of key budget variances and any notable trends as the school approaches fiscal year-end.

Purpose	Presenter	Time
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In addition, Dr.Simon will share preliminary insights from the Governor's May Revision to the state budget, including any anticipated impacts to charter school funding, Local Control Funding Formula (LCFF) allocations, or other revenue streams that may affect our financial position for the upcoming fiscal year.

IX.	Special Projects/Programs		2:15 PM
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A.	Contract with Burch Music Collective	Vote	Kelly Simon	5 m
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Bridges Charter School seeks board approval to enter into a contract with Burch Studios to provide music instruction services for the 2025–2026 school year. This partnership will support and enhance our music program by bringing specialized expertise and programming to our students.

This contract is budget-neutral. Funding will be drawn from existing budget line reductions with a salary adjustment within the Music/Performing Arts instructional staff, and a reduction in vendor programming costs currently allocated to the Homeschool Program.

Approval of this contract is recommended.

X. Governance

XI. Governance Committee

XII. Homeschool

XIII. Safety Committee

XIV. Technology

XV. Other Business

XVI. Closing Items

A.	Adjourn Meeting	Vote	
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Coversheet

Approve Minutes

Section: I. Opening Items
Item: C. Approve Minutes
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Board Meeting on April 20, 2026

APPROVED

Whole Child. Whole Family.
Whole Community.



Bridges Charter School

Minutes

Board Meeting

Date and Time

Monday April 20, 2026 at 6:15 PM

Location

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Directors Present

B. Yee, C. Dapello, K. Yevmenkina, N. Hashemi

Directors Absent

H. Kruse

Guests Present

K. Brown, K. Simon, L. Boulos, S. Stifel

I. Opening Items

A. Record Attendance and Guests

B. Call the Meeting to Order

K. Yevmenkina called a meeting of the board of directors of Bridges Charter School to order on Monday Apr 20, 2026 at 6:14 PM.

C. Approval of Agenda

B. Yee made a motion to approve the agenda.

N. Hashemi seconded the motion.

The board **VOTED** to approve the motion.

D. Approval of Minutes

II. Reports

A. Director's Reports

- Lottery and Enrollment- extremely strong
- Programmatic Audit - delivered and was successful
- Specialists and Programs for 2026-2027- reduced specialist to 4 days a week. Offered in the same amount of minutes. Hoping to bring in the Birch Studio which is a music program.
- AB 1997: CalSTRS eligibility for charter school administrators, counselors, librarians, and non-teaching staff
- Spring Farm Brunch- May 2nd. All are welcome to attend

Director Of Daily Operations

- State testing kicked off today with no issues. Testing has been condensed to 3 weeks.

Director Of Student Support

- Wellness Center Grant Report-

III. Consent Items

A. Consent Items

N. Hashemi made a motion to Approve consent items.

B. Yee seconded the motion.

The board **VOTED** to approve the motion.

IV. Business and Operations

A. Classroom Furniture

B. Yee made a motion to approve the purchase of the middle school furniture.

N. Hashemi seconded the motion.

The board **VOTED** to approve the motion.

B. Resolution to Join CSEBO as a Non-Voting Member

N. Hashemi made a motion to Approve the resolution to join CSEBO as a Non-Voting Member.

B. Yee seconded the motion.

The board **VOTED** to approve the motion.

C. Updated 26-27 School Calendar

B. Yee made a motion to approve the 26-27 school calendar.

N. Hashemi seconded the motion.

The board **VOTED** to approve the motion.

D.

Prop 39 Final Agreement

B. Yee made a motion to approve the prop 39 final agreement.
N. Hashemi seconded the motion.
The board **VOTED** to approve the motion.

E. Form 990

N. Hashemi made a motion to approve the 990.
B. Yee seconded the motion.
The board **VOTED** to approve the motion.

F. Draft of Adopted Budget

Lisa Boulos from ExEd will presented a draft of the Adopted Budget for the Board's feedback and review.

G. March Financials

Lisa Boulos will present the February Financials

H. TK/Kinder Fence, NTE \$15,000

B. Yee made a motion to approve the fence.
N. Hashemi seconded the motion.
The board **VOTED** to approve the motion.

I. SY 26-27 Employee Handbook (Draft)

will hold and bring back

J. Retire SY 25-26 Family Handbook

N. Hashemi made a motion to Retire SY 25-26 Family Handbook.
B. Yee seconded the motion.
The board **VOTED** to approve the motion.

K. SY26-27 New Family Handbook (Draft)

N. Hashemi made a motion to Approve the SY 26-27 New Family Handbook.
B. Yee seconded the motion.
The board **VOTED** to approve the motion.

L. 26-27 Board Meeting Schedule

N. Hashemi made a motion to Approve the 26-27 Board Meeting Schedule.
B. Yee seconded the motion.
The board **VOTED** to approve the motion.

V. Curriculum and Instruction

A. McGraw Hill Reveal Math Curriculum Purchase for Pilot Materials, NTE \$6500

B. Yee made a motion to Approve McGraw Hill Reveal Math Curriculum Purchase for Pilot Materials.

N. Hashemi seconded the motion.

The board **VOTED** to approve the motion.

B. Yee made a motion to Approve McGraw Hill Reveal Math Curriculum Purchase for Pilot Materials.

N. Hashemi seconded the motion.

The board **VOTED** to approve the motion.

VI. Special Projects/Programs

A. CCSA Annual Membership

N. Hashemi made a motion to Approve CCSA Annual Membership.

B. Yee seconded the motion.

The board **VOTED** to approve the motion.

N. Hashemi made a motion to Approve CCSA Annual Membership.

B. Yee seconded the motion.

The board **VOTED** to approve the motion.

N. Hashemi made a motion to Approve CCSA Annual Membership.

B. Yee seconded the motion.

The board **VOTED** to approve the motion.

N. Hashemi made a motion to Approve CCSA Annual Membership.

B. Yee seconded the motion.

The board **VOTED** to approve the motion.

VII. Special Education

A. Increase Contract Amount for Kirsten Garcia, OT, NTE \$50,000

B. Yee made a motion to approve the increase for Kirsten Garcia.

N. Hashemi seconded the motion.

The board **VOTED** to approve the motion.

VIII. Charter Policies

A. Revision of BP6163.5: Cell Phone Policy

N. Hashemi made a motion to Approve the revision of BP6163.5.

B. Yee seconded the motion.

The board **VOTED** to approve the motion.

B. Updated Wellness Policy

N. Hashemi made a motion to Approve the wellness policy.

B. Yee seconded the motion.

The board **VOTED** to approve the motion.

IX. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 7:48 PM.

Respectfully Submitted,

K. Yevmenkina

Coversheet

LCAP Public Hearing

Section: II. Presentations
Item: A. LCAP Public Hearing
Purpose: Discuss
Submitted by:
Related Material: LCAP_Public_Hearing_2026_-_Google_Slides.pdf

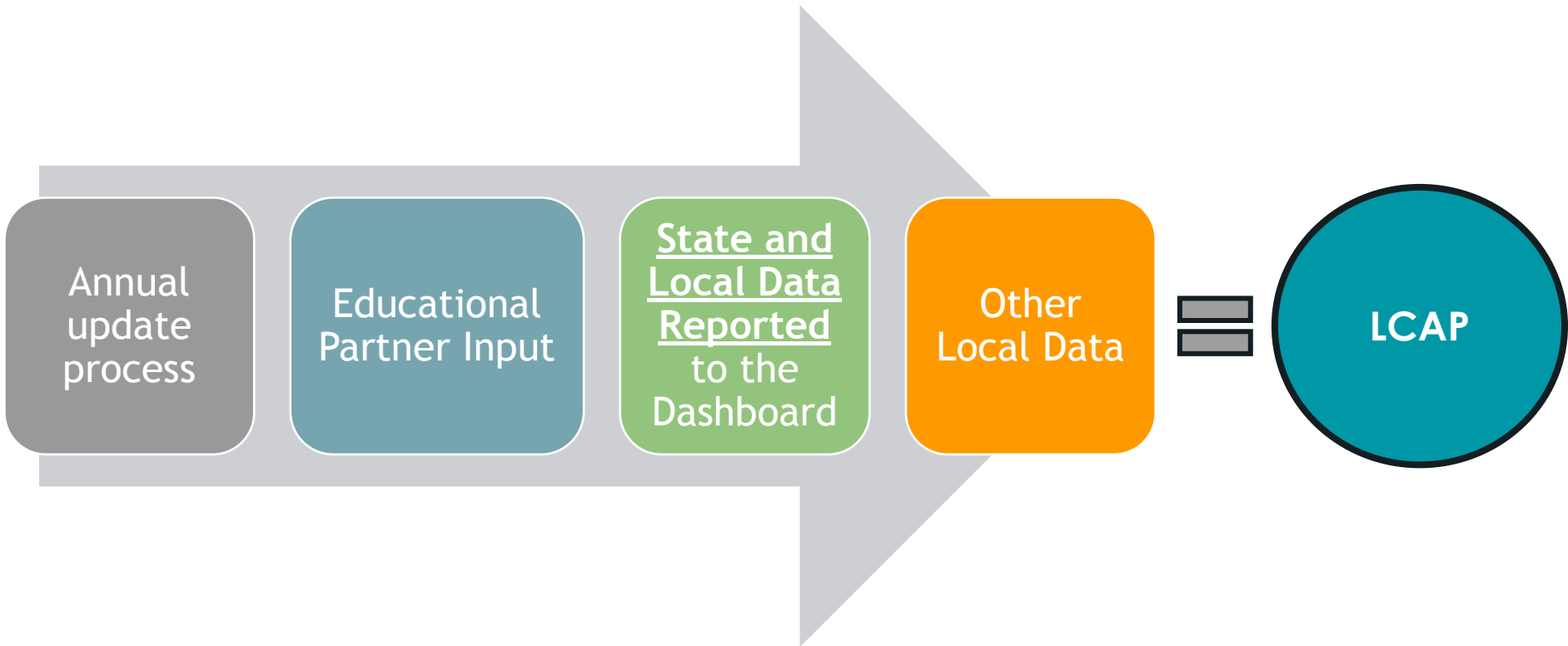
Local Control Accountability Plan: A Comprehensive Strategic Plan

A three-year plan

Provides an opportunity for local educational agencies (LEAs) to tell their stories—how, what, and why programs and services are selected to meet local needs

Describes the goals, actions, and expenditures to support positive student outcomes

Addresses state and local priorities



Summary of LCAP Process Requirements



Create an LCAP every three years and update annually

Using detailed LCAP Template
Can amend mid-year with board approval



Consult educational partners (formerly referred to as “stakeholders”)

If receiving federal “Title” or CSI funds and using LCAP as schoolwide plan, must meet federal requirements for engagement



Hold public hearing and vote (can be the same meeting)



By July 1, board must approve LCAP and submit to authorizer, county

Must also report to board on CA School Dashboard “local indicators” in conjunction with LCAP approval



Post prominently on school’s website

LCAP Content, in Order

(and CSDC's Suggested Order of Drafting)

- **LCFF Budget Overview for Parents***
 - Graphs and narratives of revenues and expenditures
- **Plan Summary**
 - An overview of the LCAP
- **Education Partner Engagement**
 - Description of how education partner input informed planning
- **Goals and Actions (1st)**
 - The plan to achieve expected outcomes & reflection on prior year—integrates annual update
- **Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students (3rd)**
 - The school's demonstration of proportional benefits to LCFF-targeted "high needs" students
- **Actions (and Expenditures) Tables* (2nd)**
 - Tables that tally LCAP expenditures by type

**Supplemental Excel sheets that tie back to the plan*

LCAP Goals

LCAPs typically include **3-5 goals** that, together, address all eight state priorities

Types of goals:

- **Focus goal(s)** – *Specific, intensive approach; required if school receives Equity Multiplier funds*
- **Broad goal(s)** – *May combine multiple actions & metrics*
- **Maintenance goal(s)** – *Catch-all; actions sustain progress made*

PRIORITY AREAS	
1	Basic Services or Basic Conditions
2	Implementation of State Academic Standards
3	Parent Engagement
4	Student Achievement
5	Student Engagement
6	School Climate
7	Access to Broad Course of Study
8	Outcomes in Broad Course of Study

Goals and Actions

Goal

Goal #	Description	Type of Goal
[Goal #]	[A description of what the LEA plans to accomplish.]	[Identify the type of goal here]

State Priorities addressed by this goal.

[Respond here]

An explanation of why the LEA has developed this goal.

[Respond here]

“Goals and Actions” Section

This section presents the school’s plans for the upcoming years, in four subsections:

- **Goals** – Address California’s eight state priorities, collectively
 - Focus on reducing disparities
- **Measuring and Reporting Results** – Define metrics & set outcome targets
 - Baseline & for upcoming years
- **Goal Analysis** – Analyze implementation of the past year and describe changes for upcoming year
- **Actions** – Describe each action to achieve goals & identify funding
 - Plus indicate if “**Contributing**” (yes/no) to the requirement to increase or improve services in proportion to LCFF supplemental and concentration funding

3. Eight “State Priorities”



Local Control Funding Formula (LCFF) legislation established “eight “state priorities” for schools

- Led to “state” and “local indicators” in the California School Dashboard
- To measure progress to the priorities
- Aligned “statewide system of support” for schools/district not meeting goals
- LCAP planning must address all of these in some form

Crosswalk: LCFF State Priorities and Indicators

PRIORITY AREAS	STATE INDICATOR	LOCAL INDICATOR
1 Basic Services or Basic Conditions	N/A	Textbook availability, adequate facilities, and correctly assigned teachers
2 Implementation of State Academic Standards	N/A	Progress in implementing the standards for all content areas
3 Parent Engagement	N/A	Parent and family input in decision-making and participation programs
4 Student Achievement	Academic (ELA & Math) English Learner Progress	N/A
5 Student Engagement	Graduation Rate, Chronic Absenteeism	N/A
6 School Climate	Suspension Rate	Administer a local climate survey every other year
7 Access to Broad Course of Study	College/Career	Monitor access to and enrollment in a broad course of study
8 Outcomes in Broad Course of Study		

4. Dashboard: State Indicators & Methodologies

State indicators combine “status levels” and “change levels”

↕ **Status levels:**

Performance in the most recent year

↔ **Change levels:**

Change in performance relative to prior year(s) data

Levels	Change				
	Declined Significantly	Declined	Maintained	Increased	Increased Significantly
Very High	Yellow	Blue	Blue	Blue	Blue
High	Orange	Yellow	Green	Green	Blue
Median	Orange	Orange	Yellow	Green	Green
Low	Red	Orange	Orange	Yellow	Yellow
Very Low	Red	Red	Red	Orange	Yellow

Status

Chronic Absenteeism



Yellow

Suspension Rate



Orange

English Learner Progress



No Performance Color

English Language Arts



Green

Mathematics



Green

**Basics: Teachers,
Instructional Materials,
Facilities**

STANDARD MET

**Implementation of Academic
Standards**

STANDARD MET

**Parent and Family
Engagement**

STANDARD MET

Local Climate Survey

STANDARD MET

**Access to a Broad Course of
Study**

STANDARD MET



Mission

Our mission is to educate the whole child using a combination of innovative curriculum and instruction along with social/emotional education embedded in the program. Students will be enabled to reach their innate intellectual, creative, and leadership potential through our commitment to nourish curiosity, compassion, independence, resourcefulness, and respect for diversity.



Whole child. Whole family. Whole community.

Goal 1.

Improve
achievement for all
Bridges students
and subgroups

State Priorities: 2, 4, 5, 7



BRIDGES
K-8 CHARTER SCHOOL

Metrics

- Improve achievement by 2% across all student groups as measured by the CAASPP assessment.
- As measured on the Bridges Common Assessments, 37% of students attending school level interventions for ELA or Math will exit the intervention program because they advance to meeting grade level standards in grades 3-5.
- As measured on the Bridges Common Assessments, 70% of students attending school level interventions for ELA will exit the intervention program because they advance to meeting grade level standards in grades K-2.
- The percentage of English Learners at level 3 or 4 that advance at least one performance level will be at or above 42%.
- The percentage of English Learners at level 1 or 2 that advance by at least one performance level will be at or above 52%.
- This percentage of students advancing in performance level will increase by 2% year over year.
- NWEA MAP Growth Assessments will indicate that all students and student subgroups tested in grades 3-8 will meet or exceed their individual growth targets in reading, language, and math by the end of the year and will increase by 2% year over year.

Action Steps + LCFF Expenditures

- Administer NWEA Assessments for grades 3-8 in Reading, Writing, and Math at least two times per year. Continue utilizing Bridges Common Assessments (Reading, Writing, Math) in K-2 according to BRIDGES annual assessment calendar. (\$3,308)
- Utilize Student Study Team (SST) to provide strategies to address student needs both in the classroom and to schedule additional support by Intervention staff. (\$74,874)
- Monitor implementation of Express Readers and Lexia in grades mClass in grades K-5. (\$7,800)
- Provide in-classroom differentiation to address student needs, including English Learners. (\$116,310.20)
- Coordinate and provide supplemental intervention services for students with disabilities. (\$272,028)
- Two additional teacher/instructional days for students. (\$0)
- Provide frequent student progress information to parents using electronic data systems and other communication methods. Uphold expectations for consistent weekly communication from teachers. (\$6,428)
- Implement Parsec Data Management for analyzing and disaggregating student data. (\$7,500)
- Utilize Reflex for supporting Math fluency (\$6,751.74)
- Implement CKLA Amplify (\$2,500)
- Provide In Classroom Tier I and Tier II Math Intervention for students in grades 3-8 (\$18,000)

Recommendations for additional Action for Goal 1:

- Reduce implementation of Reflex to grades 4-5
- Pilot California Reveal Math in grades 1-5
- Adopt math curriculum based on committee recommendations
- Provide professional development for Math instruction
- Provide Tier II Math Intervention with a credentialed teacher to students in grades 3-5



Goal 2.

Train and support teachers to implement effective instruction.

State Priorities: 1, 4, 5, 6, 7, 8

Powered by BoardOnTrack



BRIDGES
K-8 CHARTER SCHOOL



Metrics

-
- 70% of full time credentialed teachers will participate on a teacher-led committees that integrate analysis of student data.
 - Teacher Committees in Literacy and Math will meet at least 4 times per year to engage in professional learning.
 - Teachers will meet in grade span professional learning communities at least three times annually with a focus on improving instruction using student data.

Action Steps + LCFF Expenditures

- Continue to refine curriculum maps for ELA, math, and science in alignment with CCSS and NGSS (\$3,613.22)
- Implement K-8 digital literacy/technology standards and 21st century skills expectations for each grade (\$25,228)
- Analyze data from benchmark assessments at least two times annually (\$1,668.76)
- Implement Universal Monitoring by administering surveys at least two times per year. (\$16,378.40)
- Teacher led committees will meet regularly to analyze student data, and to discuss and implement research based instruction (\$10,000)
- On-site professional development will be provided with a focus on instructional practices for target subgroups (\$2,571.96)
- Implement Anti-bias training for teachers and staff (\$1,425.46)
- Implement McKinney Vento Training for all teachers (\$400)

Recommendations for additional Action for Goal 2:

- Partner with O’Kawai to provide DEI, Bias, and Council Training for teachers and staff

Goal 3.

Provide an effective environment for learning based on whole child tenets.

State Priorities: 1, 3, 5, 6, 7

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BRIDGES
K-8 CHARTER SCHOOL



Metrics

- Maintain student attendance rate. ADA of Bridges' classroom-based programs will sustain at 95.39% or higher at the P2 reporting period.
- Suspension/expulsion rates will be less than 3% of enrollment annually.
- Parent satisfaction survey will indicate that at least 70% of respondents "agree" and "strongly agree" that Bridges is effective in the following areas:
 - student instruction, engagement, support and challenge with their learning (Q 5,6,7, 8,9,13)
 - social-emotional learning and conflict resolution skill development, (Q,10,11)
 - healthy and safe school climate, (Q 12,19,20,21,23,24,25, 27,28, 32)
 - parent involvement in meaningful ways (Q 3,4,14,15, 18, 22)
 - communication, organization and administration (Q 1,2,16,17,,29, 30,31)
- At least 50% of Bridges families will be involved in classroom volunteering regularly as measured by self-reported surveys.
- At least 30% of Bridges families will be involved in leadership activities as evidenced by participation in PAC, PMCs, Board or other committee participation, as evidenced by self reported surveys.
- We will implement at least 3 school wide community events per year focused on community building.
- California Healthy Kids Survey Results will indicate that 70% of students in 7th grade are neutral, agree or strongly agree across target categories increasing year over year until we reach and maintain at least 82%, and that 70% of students in 5th grade are neutral, agree or strongly agree across target categories increasing year over year until we reach and maintain at least 82%.



Action Steps + LCFF Expenditures

- Provide ongoing parent education and required volunteer orientations (\$6,000)
- Offer enrichment activities for all students and subgroups (\$20,500)
- Monitor implementation of social-emotional learning curriculum (SEL) and track progress. (\$1,468)
- Provide social skills development skills for all students and subgroups. (\$500)
- Provide professional development for teachers and staff in conflict resolution and whole child learning.

Recommendations for additional Action for Goal 3:

- Partner with Aaron Burch Studios to provide music enrichment program to students
- Collaborate with CLU to provide expanded opportunities for student internships
- Implement SARB process and revisit Board Policy for Attendance and Chronic Absenteeism
- Provide a stipend for a teacher leading the SARB
- Increase counseling hours on site

Coversheet

Consent Items

Section: V. Consent Items
Item: A. Consent Items
Purpose: Vote
Submitted by:
Related Material: K_Simon_Workflow_April.xlsx
6.1.2._-_2026-04_Bridges_Board_Financial_Packet.pdf
6.1.3._-_2026-04_Bridges_Purchase_Orders.pdf
6.1.4._-_2026-04_Bridges_Amazon_Payments.pdf
6.2._-_FY25-26._-_Bridges._-_Position_Control._-_as_of_05.15.2026.pdf

Notice

The following file is attached to this PDF. You will need to open this packet in an application that supports attachments to pdf files, e.g. [Adobe Reader](#):

K_Simon_Workflow_April.xlsx

BRIDGES CHARTER SCHOOL - Financial Dashboard (April 2026)

1 Key Performance Indicators

ADA vs. Budget ● Cash on Hand ●

Net Income / (Loss) ● Year-End Cash ●

KEY POINTS

Enrollment as of month 8 (P2 Certified) was 5 students above budget, with an ADA of 400.50, 2.36 lower than budget, which would normally result in a decrease in LCFF; however, Bridges is seeing a \$77K increase in LCFF Revenue due to the increase of the TK Add-On rate from \$3148/ADA to \$5545/ADA.

Forecast includes \$41K of restricted one-time funds. An additional \$82K remains available to spend through FY27/28.

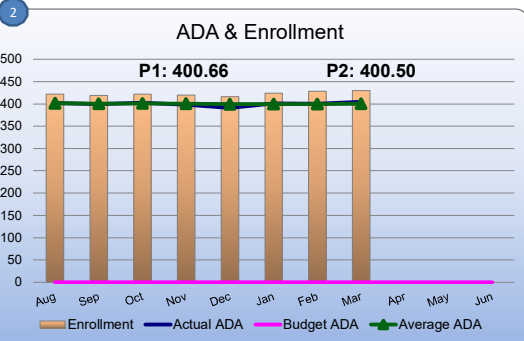
NOTABLE VARIANCES FROM ORIGINAL BUDGET:

REVENUE:

- +\$67K - LCFF higher than budget (TK Add-On +45K, ADA Increase +22K)
- +\$47K - OTHER FEDERAL higher than budget (CDEFA Grant Revenue)
- +\$91K - OTHER STATE higher than budget (Increased ELOP plus SSPD Grant)
- -\$16K - OTHER LOCAL lower than budget (Lower Child Care revenue projected)
- +\$81K - GRANTS/FUNDRAISING higher than budget (Wellness & Sprouts Grant)

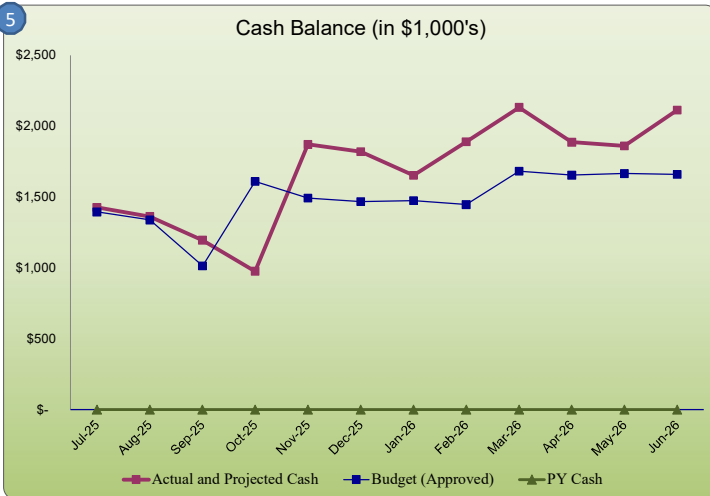
NET INCOME (LOSS):

- \$44K which is +\$281K better than budget [Budget expected (-\$237K) loss].



Attendance Analysis	Actual through Month 8	Actual P2	Budget P2	Budget Variance B/(W)	FY 24-25
Enrollment	430	430	425	5	0
Attendance %	94.57%	94.57%	94.79%	-0.22%	95.28%
Avg Daily Attendance (ADA)	400.50	400.50	402.86	(2.36)	394.45

Income Statement	Actual through 04/30/26	Forecast as of 04/30/26	FY 25-26 Budget	Budget Variance B/(W)	FY 24-25
Local Control Funding Formula	3,415,248	4,718,448	4,651,319	67,129	4,429,424
Federal Revenue	95,616	243,097	195,799	47,298	265,885
State Revenue	418,425	537,521	446,959	90,562	468,321
Other Local Revenue	255,449	317,328	317,290	38	760,098
Grants/Fundraising	85,580	164,000	97,400	66,600	87,171
TOTAL REVENUE	4,270,318	5,980,394	5,708,767	271,627	6,010,899
Certificated Salaries	2,029,305	2,463,589	2,336,930	(126,659)	2,272,318
Classified Salaries	634,687	744,034	766,020	21,986	736,044
Benefits	971,538	1,167,922	1,216,418	48,496	1,073,518
Student Supplies	310,433	416,964	423,137	6,173	376,631
Operating Expenses	870,737	1,123,870	1,183,667	59,797	1,236,469
Other	16,912	19,549	19,549	0	20,820
TOTAL EXPENSES	4,833,612	5,935,929	5,945,721	9,792	5,715,798
NET INCOME / (LOSS)	(563,294)	44,465	(236,954)	281,419	295,101



Year-End Cash Balance		
Projected	Budget	Variance
2,113,416	1,707,843	405,573

Balance Sheet	6/30/2025	3/31/2026	4/30/2026	6/30/2026
Assets				
Cash, Operating	1,613,830	2,132,026	1,886,218	2,113,416
Cash, Restricted	0	0	0	0
Accounts Receivable	566,294	37,149	37,149	738,718
Due From Others	370,400	19	19	19
Deposits/Prepays	2,571	20,450	26,753	26,753
Net Fixed Assets	184,664	171,857	170,177	182,540
Lease Assets	42,953	22,243	21,046	18,638
Other Assets	0	0	0	0
Total Assets	2,780,712	2,383,745	2,141,362	3,080,085
Liabilities				
A/P & Payroll	225,746	209,073	192,073	207,908
Due to Others	20,476	0	0	317,537
Deferred Revenue	0	0	0	0
Lease Liabilities	42,953	22,243	21,046	18,638
Other Liabilities	0	0	0	0
Total Debt	0	0	0	0
Total Liabilities	289,175	231,316	213,119	544,083
Equity				
Beginning Fund Bal.	2,196,436	2,491,537	2,491,537	2,491,537
Net Income/(Loss)	295,101	(339,108)	(563,294)	44,465
Total Equity	2,491,537	2,152,429	1,928,243	2,536,002
Total Liabilities & Equity	2,780,712	2,383,745	2,141,362	3,080,085
Available Line of Credit				
Days Cash on Hand	103	131	116	130
Cash Reserve %	28.3%	36.0%	31.9%	35.7%





Bridges Charter School Financial Analysis April 2026

Bridges Charter School is projected to have a net income \$45K in FY25-26 compared to (-\$237K loss) in the board-approved budget. Reasons for this positive variance of \$281K are explained below in the Income Statement section of this analysis.

Balance Sheet

As of April 30, 2026, the unrestricted cash balance was \$1.89M. By June 30, 2026, the unrestricted cash balance is projected to be \$2.11M, which represents a 36% reserve.

As of April 30, 2026, the Accounts Receivable balance was \$37K compared to \$37K in the prior month pending revenue receipts from FY24/25.

As of April 30, 2026, the Accounts Payable balance, including payroll liabilities, totaled \$192K, compared to \$209K in the prior month.

Income Statement

Revenue

Total revenue for FY25-26 is projected to be \$5.98M, which is \$272K or 4.8% over budgeted revenue of \$5.71M. The forecast included the following significant revenue variances:

- **LCFF Revenue (8011-8098) \$67K increase** due to an increase in the TK Add-On rate from \$3148/ADA to \$5545/ADA.
- **All Other Federal Revenue (8299) \$43K increase** due to the CDFA Reimbursement grant revenue not in the original budget.
- **Expanded Learning Opportunity Program (8595) \$29K increase** due to an increase in the ELOP rate to \$1575/ADA
- **State Revenue - Other (8599) \$49K increase** due to the addition of the new Student Support and Professional Development Discretionary Block Grant (SSPDD) from the state.
- **Childcare & Enrichment Program Fees (8682) \$16K decrease** due to a lower estimated total than originally budgeted.
- **Grants (8692) \$81K increase** due to the newly procured Wellness Grant along with the 10K Sprouts Grant as of January 2026.

This report will discuss revenue and expenditure variances from the Board-approved budget that are above \$20,000 and 10%.



Expenses

Total expenses for FY25-26 are projected to be \$5.94M, which is \$10K or 0.2% under budgeted expenditures of \$5.95M. The forecast included the following significant expense variances:

- **Salaries & Benefits (1000-3999) \$56K increase as follows:**
 - +\$56K due to a one-time 2% increase for all staff in November 2025
- **Operating Services (5000-5999) \$59K decrease as follows:**
 - **Other Student Instructional Services (5849) \$15K under**
 - **All Other Consultants & Services (5859) \$43K under**

ADA

Budget P2 ADA was 402.86 based on enrollment of 425 and a 94.8% attendance rate.

Month 8 ADA was 404.74 with a 94.1% ADA rate.

Forecasted and P2 Certified ADA is 400.50 with an ending enrollment estimate of 430 and a 94.6% attendance rate.

This report will discuss revenue and expenditure variances from the Board-approved budget that are above \$20,000 and 10%.

BRIDGES CHARTER SCHOOL
 2025-26 Cash Flow Forecast
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	2025-26		Actuals as of 4/30/2026											FORECAST		Budget Variance		
	Budget	Trend	Actual Jul-25	Actual Aug-25	Actual Sep-25	Actual Oct-25	Actual Nov-25	Actual Dec-25	Actual Jan-26	Actual Feb-26	Actual Mar-26	Actual Apr-26	Actual May-26	Actual Jun-26	Accrual	Jul-25 - Jun-26	Better / (Worse)	% Better / (Worse)
Apportionment Schedule, June Deferral Only, Paid on a Lag			0%	5%	5%	9%	9%	9%	9%	9%	20%	20%	20%	20%	20%			
1 - District Apportionment Schedule, Paid on Time			6%	12%	8%	8%	8%	8%	8%	1/3	1/6	1/6	1/6	1/6	0			
# of School Days in Month	175	175	0	8	21	21	13	15	18	18	21	16	19	5		175		
Enrollment	425	430														430	5.00	1%
Unduplicated Pupil Percentage	21%	18.5%														18.5%	(0.02)	-12%
ADA	402.86	400.50														400.50	(2.36)	-1%
ADA Rate	94.79%	94.57%														94.57%	(0.00)	0%
Income																		
8011-8098 - Local Control Funding Formula Sources																		
8011 Local Control Funding Formula	1,187,088	1,231,983	-	56,590	56,590	101,862	101,862	203,724	-	101,862	122,291	122,291	122,291	122,291	120,329	1,231,983	44,895	4%
8012 Education Protection Account	80,750	80,100	-	-	-	19,723	-	19,722	-	-	-	-	-	-	20,060	80,100	(650)	-1%
8019 Local Control Funding Formula - Prior Year	-	164,131	-	-	-	-	-	-	-	-	32,826	32,826	32,829	32,829	32,821	164,131	164,131	100%
8096 In Lieu of Property Taxes	3,383,481	3,406,365	-	-	-	-	1,143,951	-	269,165	538,330	471,038	-	471,040	235,520	277,321	3,406,365	22,884	1%
8098 In Lieu of Property Taxes, Prior Year	-	(164,131)	-	-	-	-	-	-	-	-	-	-	-	-	(164,131)	(164,131)	(164,131)	100%
Total 8011-8098 - Local Control Funding Form	4,651,319	4,718,448		56,590	56,590	121,585	1,245,813	223,446	269,165	640,192	626,155	175,712	626,160	390,640	286,400	4,718,448	67,129	1%
8100-8299 - Federal Revenue																		
8181 Special Education - Federal (IDEA)	99,973	99,973	-	-	-	-	-	-	-	-	-	-	-	-	99,973	99,973	-	
8221 Child Nutrition - Federal	58,229	58,229	-	-	-	-	2,086	12,590	-	8,958	-	-	6,245	6,826	21,524	58,229	(0)	0%
8223 CACFP Supper	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8291 Title I	22,474	26,345	-	-	-	-	-	-	-	-	-	6,895	-	-	19,450	26,345	3,871	17%
8292 Title II	5,123	5,816	-	-	-	-	2,525	-	-	-	-	-	-	-	3,291	5,816	693	14%
8294 Title III	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8295 Title IV, SSAE	10,000	10,000	-	-	-	-	-	-	-	-	-	-	-	-	10,000	10,000	-	
8296 Title IV, PCSGP	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8297 Facilities Incentive Grant	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8299 All Other Federal Revenue	-	42,734	-	-	-	36,552	-	14,025	-	-	-	11,984	-	-	(19,827)	42,734	42,734	100%
Total 8100-8299 - Other Federal Income	195,799	243,097				36,552		4,611	26,615		8,958	18,879	6,245	6,826	134,411	243,097	47,298	24%
8300-8599 - Other State Revenue																		
8520 Child Nutrition - State	173,411	173,411	-	-	-	-	6,103	35,935	-	25,558	-	-	16,628	18,710	70,476	173,411	0	0%
8550 Mandate Block Grant	7,913	8,189	-	-	-	-	8,094	-	-	-	-	-	-	-	95	8,189	276	3%
8561 State Lottery - Non Prop 20	80,365	79,816	-	-	-	-	-	-	32,823	-	-	-	-	-	24,389	79,816	(549)	-1%
8562 State Lottery - Prop 20	34,502	34,447	-	-	-	-	-	-	-	-	-	-	-	-	22,885	34,447	(55)	0%
8560 Lottery Revenue	114,867	114,262	-	-	-	-	-	-	-	-	-	-	-	-	47,274	114,262	(605)	-1%
8587 State Grant Pass-Through	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8591 SB740	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8592 State Mental Health	32,971	34,135	-	1,674	1,674	3,013	3,013	6,026	-	3,013	3,109	3,109	3,109	3,109	3,286	34,135	1,164	4%
8593 After School Education & Safety	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8594 Supplemental Categorical Block Grant	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8595 Expanded Learning Opportunity Program	71,484	100,000	-	5,000	5,000	9,000	9,000	18,000	-	9,000	9,000	9,000	9,000	9,000	9,000	100,000	28,516	40%
8596 Prop 28 Arts & Music	46,313	58,800	-	2,944	2,944	5,299	10,598	-	5,299	5,307	5,307	5,307	5,307	5,307	5,189	58,800	12,487	27%
8599 State Revenue - Other	-	48,724	-	-	-	-	92,621	7,559	-	34,938	-	-	-	-	(86,394)	48,724	48,724	100%
Total 8300-8599 - Other State Income	446,959	537,521		9,618	9,618	17,312	109,933	56,380	35,935	50,135	77,912	51,581	34,044	36,126	48,927	537,521	90,562	20%
8600-8799 - Other Local Revenue																		
8631 Sale of Equipment & Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8634 Food Service Sales	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8650 Leases & Rentals	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8660 Interest & Dividend Income	-	6,343	41	48	50	48	35	12	-	2,689	0	2,689	365	365	-	6,343.26	6,343	100%
8662 Net Increase (Decrease) in Fair Value of Inv	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8681 Intra-Agency Fee Income	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8682 Childcare & Enrichment Program Fees	25,000	9,160	-	-	378	2,730	150	598	1,201	1,468	827	1,430	189	189	-	9,160.09	(15,840)	-63%
8689 All Other Fees & Contracts	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8692 Grants	-	81,000	-	-	10,000	-	-	-	-	-	-	-	-	71,000	-	81,000	81,000	100%
8694 In Kind Donations	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8695 Contributions & Events	93,000	83,000	-	1,802	9,991	12,167	15,353	10,659	15,692	6,976	909	2,031	3,710	3,710	-	83,000	(10,000)	-11%
8696 Other Fundraising	4,400	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	(4,400)	-100%
8697 E-Rate	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8698 SELPA Grants	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

BRIDGES CHARTER SCHOOL
 2025-26 Cash Flow Forecast
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	2025-26		ACTUAL										Actuals as of 4/30/2026			FORECAST	Budget Variance	
	Budget	Trend	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Accrual	Jul-25 - Jun-26	Better / (Worse)	% Better / (Worse)
	5611 School Rent - Private Facility	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
5613 School Rent - Prop 39	201,737	201,737	33,623	16,811	16,811	16,811	16,811	16,811	16,811	16,811	16,811	16,811	16,811	-	-	201,737	(0)	0%
5619 Other Facility Rentals	530	530	-	-	-	-	-	-	-	-	-	-	265	265	-	530	0	0%
5621 Equipment Lease	21,622	29,011	3,470	2,236	2,236	2,928	2,454	2,236	2,792	2,236	2,236	2,997	1,594	1,594	-	29,011	(7,389)	-34%
5631 Vendor Repairs	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
5812 Field Trips & Pupil Transportation	96,533	88,000	34,726	28,090	3,800	(2,984)	1,896	959	1,269	8,990	3,182	1,401	3,336	3,336	-	88,000	8,533	9%
5821 Legal	21,430	26,430	355	-	2,684	474	4,253	551	6,481	1,002	1,700	-	4,466	4,466	-	26,430	(5,000)	-23%
5823 Audit	20,999	20,999	-	-	-	3,371	-	-	1,124	-	-	10,763	2,871	2,871	-	20,999	0	0%
5831 Advertisement & Recruitment	27,916	30,365	4,474	3,209	1,550	4,357	2,273	1,675	4,751	1,876	1,550	1,550	1,550	1,550	-	30,365	(2,449)	-9%
5841 Contracted Substitute Teachers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
5842 Special Education Services	147,805	136,485	-	6,402	10,989	11,877	9,148	8,274	11,085	13,060	6,083	28,291	15,639	15,639	-	136,485	11,320	8%
5843 Non Public School	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
5844 After School Services	3,500	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	3,500	100%
5849 Other Student Instructional Services	50,885	36,299	4,308	-	3,081	1,564	1,080	1,080	1,440	1,080	1,800	408	10,230	10,230	-	36,299	14,586	29%
5852 PD Consultants & Tuition	5,000	11,551	-	234	380	3,265	175	-	1,650	147	-	99	2,801	2,801	-	11,551	(6,551)	-131%
5854 Nursing & Medical (Non-IEP)	-	3,500	-	3,280	-	-	-	-	-	-	-	-	110	110	-	3,500	(3,500)	100%
5859 All Other Consultants & Services	248,146	205,505	9,687	9,687	55,683	10,037	12,478	9,687	15,028	14,190	9,687	-	29,670	29,670	-	205,505	42,641	17%
5861 Non Instructional Software	29,680	24,636	8,447	1,687	6,404	(874)	13	2,875	756	73	406	40	2,404	2,404	-	24,636	5,044	17%
5865 Fundraising Cost	1,240	1,240	79	-	-	-	-	-	-	-	-	-	581	581	-	1,240	-	-
5871 District Oversight Fees	46,513	47,184	-	-	-	-	-	-	-	-	-	-	-	-	47,184	47,184	(671)	-1%
5872 Special Education Fees (SELPA)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
5881 Intra-Agency Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
5895 Bad Debt Expense	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
5898 Uncategorized Expense	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
5899 All Other Expenses	27,910	27,160	1,838	2,879	2,532	2,273	3,020	2,509	3,224	1,731	1,128	1,189	2,418	2,418	-	27,160	750	3%
5911 Office Phone	10,385	2,500	13	-	-	-	-	-	-	-	-	-	1,244	1,244	-	2,500	7,885	76%
5913 Mobile Phone	3,300	3,300	267	240	177	174	165	-	339	174	165	165	717	717	-	3,300	-	-
5921 Internet	1,421	1,933	211	129	198	155	155	155	155	155	155	155	155	155	-	1,933	(512)	-36%
5923 Website Hosting	21,300	18,204	1,500	1,704	-	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	3,000	-	18,204	3,096	15%
5931 Postage & Shipping	3,585	3,945	3,196	-	42	244	44	-	-	65	144	16	97	97	-	3,945	(360)	-10%
5999 Other Communications	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total 5000 - Operating Services	1,183,667	1,123,870	205,155.10	18,934.66	113,102.20	92,427.36	65,028.04	56,744	101,142	67,731	61,120	89,353	99,691	84,604	68,838	1,123,870.06	59,797	5%
6000 - Capital Outlay																		
6901 Depreciation Expense	19,549	19,549	1,735	1,735	1,680	1,680	1,680	1,680	1,680	1,680	1,680	1,680	1,680	957	-	19,549	-	-
6911 Amortization Expense - Lease Assets	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
6912 Amortization Expense - Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
6999 Capital Outlay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total 6000 - Capital Outlay	19,549	19,549	1,735	1,735	1,680	1,680	1,680	1,680	1,680	1,680	1,680	1,680	1,680	957	-	19,549	-	-
7000 - Other Outgo																		
7438 Interest Expense	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total 7000 - Other Outgo	5,945,721	5,935,929	318,581	375,843	598,061	544,956	548,802	443,639	508,365	489,219	501,204	504,943	561,021	472,458	68,838	5,935,929	9,792	0%
TOTAL EXPENSE																		
NET INCOME	(236,954)	44,465	(316,928)	(293,520)	(495,234)	(325,983)	851,094	(89,163)	(159,722)	248,108	242,240	(224,185)	138,126	64,833	404,800	44,465	281,419	-119%
Operating Income	-	64,014	-	-	-	-	-	-	-	-	-	-	-	-	-	64,014	-	-
Operating Income Excluding Non-cash Lease Expenses	-	64,014	-	-	-	-	-	-	-	-	-	-	-	-	-	64,014	39,241.58	-
EBITDA	-	64,014	-	-	-	-	-	-	-	-	-	-	-	-	-	64,014	-	462.26

BRIDGES CHARTER SCHOOL
2025-26 Cash Flow Forecast

Prepared by ExED. For use by ExED and ExED clients only. © 2025 ExED

	2025-26		ACTUAL										Actuals as of 4/30/2026			FORECAST	Budget Variance	
	Budget	Trend	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Accrual	Jul-25 - Jun-26	Better / (Worse)	% Better / (Worse)
	Beginning Cash Balance		1,613,830	1,613,830	1,426,821	1,361,684	1,195,104	975,896	1,871,077	1,819,917	1,652,455	1,889,300	2,132,026	1,886,218	1,860,153	2,113,416	1,613,830	
Cash Flow from Operating Activities			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Income		44,465	(316,928)	(293,520)	(495,234)	(325,983)	851,094	(89,163)	(159,722)	248,108	242,240	(224,185)	138,126	64,833	404,800	44,465		5,916,380
Change in Accounts Receivable		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Prior Year Accounts Receivable		936,694	28,826	395,236	252,279	71,150	20,667	126,576	-	4,811	(0)	-	26,201	16,219	-	-	-	-
Current Year Accounts Receivable		(743,990)	-	-	-	-	-	-	-	-	-	-	-	-	(743,990)	(743,990)		
Change in Due from		-	-	-	(15)	-	(24,196)	20,382	3,410	400	-	-	-	-	-	(19)		
Change in Accounts Payable		(10,943)	84,769	(203,319)	49,126	28,286	13,013	(52,838)	(29,209)	(23,495)	(3,576)	(15,447)	(66,160)	186,255	21,653	(10,943)		
Change in Due to		297,061	-	(20,476)	-	-	-	-	-	-	-	-	-	-	317,537	297,061		
Change in Current Lease Payable		644	(11,290)	(1,162)	(1,167)	(1,171)	(1,175)	(1,180)	(1,184)	(1,188)	(1,193)	(1,197)	(1,202)	(1,206)	14,827	(9,487)		
Change in Lease Assets		14,183	11,290	1,162	1,167	1,171	1,175	1,180	1,184	1,188	1,193	1,197	1,202	1,206	-	24,315		
Change in Accrued Vacation		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Change in Payroll Liabilities		(6,896)	12,358	55,631	27,994	6,471	8,726	(10,762)	7,014	5,474	7,663	(1,553)	(125,912)	-	-	(6,896)		
Change in Prepaid Expenditures		(24,181)	2,232	(423)	-	(797)	-	(2,457)	(7,607)	(3,143)	(5,682)	(6,303)	-	-	-	(24,181)		
Change in Deposits		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Change in Deferred Revenue		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Change in OPEB / Net Pension Liability		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Change in Long Term Lease Liabilities		(14,827)	-	-	-	-	-	-	-	-	-	-	-	-	-	(14,827)	(14,827)	
Change in Other Long Term Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Change in Other Long Term Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Depreciation Expense		19,549	1,735	1,735	1,680	1,680	1,680	1,680	1,680	1,680	1,680	1,680	1,680	957	-	19,549		
Cash Flow from Investing Activities			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Capital Expenditures		(17,425)	-	-	(2,425)	-	-	-	-	-	-	-	-	(15,000)	-	(17,425)		
Cash Flow from Financing Activities			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Source - Sale of Receivables		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Use - Sale of Receivables		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Source - Loans		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Use - Loans		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ending Cash Balance		2,113,436	1,426,821	1,361,684	1,195,104	975,896	1,871,077	1,819,917	1,652,455	1,889,300	2,132,026	1,886,218	1,860,153	2,113,416	2,113,416	2,113,416		

Purchase Order Detail with Split Reference Codes

Account Name	Vendor Name	Vendor External	Release Date	Order Id	Orderer	Order Date	PO Numb	PO Amount	Unit Price	Quantity	Extended Price	Reference Code	Reference Code	Short Description
Bridges Charter School	RIVERSIDE ASSESSMENTS, LLC	V0035470	4/2/2026 06:23:07 PM	2950305	Kami Brown	4/1/2026 11:44:43 AM	10079	\$546.00	\$1.30	420	\$546.00	5842-BCS1-0000-0-0	\$546.00	WJV-UNLIMITED SUBSCRIPTION JUNE 12 2026 THRU JUNE 11 2027
Bridges Charter School	MANEUVERING THE MIDDLE, LLC	V000081	4/16/2026 12:44:09 PM	2953383	Kami Brown	4/14/2026 01:19:14 PM	10080	\$1040.00	\$365.00	1	\$365.00	4111-BCS1-0000-0-0	\$365.00	All Access:CCSS:Single Grade License with Intervention
Bridges Charter School	MANEUVERING THE MIDDLE, LLC	V000081	4/16/2026 12:44:09 PM	2953383	Kami Brown	4/14/2026 01:19:14 PM	10080	\$1040.00	\$225.00	3	\$675.00	4111-BCS1-0000-0-0	\$675.00	All Access:CCSS:Single Grade License

Check #	Vendor Name	Date	Description	Amount
P089066	AMAZON	4/3/2026	FY25-26 - CAFETERIA SUPPLIES, BOOKS, CLASSROOM SUPPLIES	1,642.94
P089078	AMAZON	4/3/2026	FY25-26 - OFFICE SUPPLIES, CLASSROOM SUPPLIES	1,705.24
P089897	AMAZON	4/17/2026	FY25-26 - ADMIN SUPPLIES, JANITORIAL SUPPLIES	1,322.02
P090244	AMAZON	4/23/2026	FY25-26 - JANITORIAL, ADMIN, & CLASSROOM SUPPLIES	200.38
P090536	AMAZON	4/29/2026	FY25-26 - OFFICE SUPPLIES	54.92
				4,925.50

BRIDGES CHARTER SCHOOL

FY25/26 POSITION CONTROL

(as of 5/15/2026)

FAMILY MEMBERS ON STAFF:		
Cindy McCarthy	Lindsay Beard	Mother/Daughter
Dr. Kelly Simon	Darla Van Horn	Mother/Daughter
Veronica Paredes	Susie Paredes	Mother/Daughter
Arylne Gomez	Morlyn Gonzalez	Sisters

NEW HIRE/POSITION/CHANGE
TERMINATED
OPEN POSITION
SUBSTITUTE

Position #	Last Name / First Name	Position	Salary / Hourly	Certificated / Classified	FTE	Hire Date	Scale
#01	Simon, Kelly R	Director - Executive	Salary	Certificated	1.00000	07/01/17	CE214/DR/09
#02	McCarthy, Cindy A	Director - Daily Operations	Salary	Certificated	1.00000	08/18/11	01/CL2/ 9
#03	Stifel, Skye	Director - Student Support Services	Salary	Certificated	1.00000	08/24/20	AD214/AD05
#04	Ornstein, Laura M	Teacher - Art	Salary	Certificated	1.00000	10/17/13	01/CL4/ 12
#05	Frazier, Jill M	Teacher - Homeschool Lead	Salary	Certificated	1.00000	08/15/24	01/HSLT/10
#06	Able, Nissa	Teacher - TK	Salary	Certificated	1.00000	08/15/24	01/CL3/8
#07	Villalpando, Tracy M	Teacher - TK/K	Salary	Certificated	1.00000	09/30/21	01/CL3/ 7
#08	Holder, Carmen T	Teacher - K	Salary	Certificated	1.00000	04/11/14	01/CL5/ 14
#09	Gore, Marsi A	Teacher - 1A	Salary	Certificated	1.00000	09/02/10	01/CL5/15
#10	Moss, Dendee L	Teacher - 1B	Salary	Certificated	1.00000	08/12/22	01/CL5/11
#11	Chisum, Megan P	Teacher - 2	Salary	Certificated	1.00000	08/17/17	01/CL2/17
#12	Boyle, Stephanie A	Hourly Teacher - 3	Hourly	Certificated	0.72500	02/28/23	01/CL2/8
#12	Isaacson, Katherine M	Hourly Teacher - 2/3	Hourly	Certificated	0.55000	08/17/17	01H/CL5 /11
#13	Rusconi-Pecchi, Alanna	Teacher - 3	Salary	Certificated	1.00000	08/23/13	01/CL5/17
#14	McGivern, Kathleen J	Teacher - 4	Salary	Certificated	1.00000	08/15/24	01/CL2/9
#15	Foster, Alana	Teacher - 5	Salary	Certificated	1.00000	10/17/25	01/CL3/2
#16	Kernochan, Chelsea L	Teacher - 5	Salary	Certificated	1.00000	10/24/22	01/CL4/ 9
#17	Dellibovi, Lauren C	Teacher - MS	Salary	Certificated	1.00000	08/15/24	01/CL5/6
#18	Bergman, Michelle	Teacher - RTI Coordinator	Salary	Certificated	1.00000	01/27/25	RTIC/01/10
#19	Fisher, Jessica C	Teacher - RTI Coordinator	Salary	Certificated	1.00000	08/01/23	RTIC/01/07
#20	Bradley, Tanner	Teacher - Resource	Salary	Certificated	1.00000	08/08/25	01/CL2/9
#21	Hardisty, Courtney A	Teacher - Resource	Salary	Certificated	1.00000	03/07/25	01/CL3/11
#22	Pollard, Summer L	Hourly Teacher - RTI Liaison	Hourly	Certificated	0.35000	08/17/23	6/5/2004
#23	Cayce, Katherine I	Hourly Teacher - Independent HS	Hourly	Certificated	0.20000	09/13/21	HSH/004/1
#24	Campbell, Amy M	Hourly Teacher - Mentor	Hourly	Certificated	up to 100 HRS	08/07/25	CL5/15
#25	Dempster, Rian R	Hourly Teacher - Middle School (.0625 FTE Env.Ed)	Hourly	Certificated	0.70000	08/15/24	01/CL1/1 (39.01)
#26	Thatcher, Susan	Hourly Teacher - Music	Hourly	Certificated	0.32500	08/20/25	02H/CL5/11
#27	Heim, Jessica A	Hourly Teacher - Supervising Independent Study	Hourly	Certificated	0.70000	12/09/24	HSST/11
#28	Kazmirche, Kelly	Hourly Teacher - Supervising Independent Study	Hourly	Certificated	0.70000	08/20/25	ST/11
#29	Ouerbacher, Darcie L	Hourly Teacher - Supervising Independent Study	Hourly	Certificated	0.70000	08/25/14	ST/10
#30	Samuel, Benjamin Y	School Counselor	Hourly	Certificated	0.10000	04/27/22	Counsel 1/1
#40	Morgan, Michelle R	School Counselor	Salary	Certificated	0.87500	09/09/20	COUNSEL 1/3
#41	Brown, Kami M	Administrative Coordinator	Salary	Classified	1.00000	12/01/21	AC225/AC/10

BRIDGES CHARTER SCHOOL

FY25/26 POSITION CONTROL

(as of 5/15/2026)

FAMILY MEMBERS ON STAFF:		
Cindy McCarthy	Lindsay Beard	Mother/Daughter
Dr. Kelly Simon	Darla Van Horn	Mother/Daughter
Veronica Paredes	Susie Paredes	Mother/Daughter
Arlyne Gomez	Morlyn Gonzalez	Sisters

NEW HIRE/POSITION/CHANGE
TERMINATED
OPEN POSITION
SUBSTITUTE

Position #	Last Name / First Name	Position	Salary / Hourly	Certificated / Classified	FTE	Hire Date	Scale
#42	Douglas, Hafiza R	Attendance & Health Tech	Hourly	Classified	0.87500	08/02/21	02H/O /007
#43	Hinricher, Justyn R	Child Care Supervisor	Hourly	Classified	0.71250	11/29/21	02H/I/008
#44	Pryor, Abigail C	Child Care Lead	Hourly	Classified	0.24375	08/21/24	02H/I/009
#45	Gonzalez, Arlyne	Child Care Assistant	Hourly	Classified	0.19375	08/05/25	02H/H/008
#46	Hultgren, Rochelle	Child Care Assistant	Hourly	Classified	0.26250	08/18/25	02H/H/007
#47	Paredes, Susana	Child Care Assistant	Hourly	Classified	0.23125	08/18/25	02H/H/008
#48	Johnson, Marty	Child Care Assistant	Hourly	Classified	0.25000	10/20/25	02H/H/008
#49	Paz, Juliana	Custodian	Hourly	Classified	0.87500	01/08/18	02H/B/009
#50	Rendon-Natividad, Jose A	Custodian	Hourly	Classified	0.71875	01/15/25	02H/B /008
#51	Lyden, Amy R	Food Services Supervisor	Hourly	Classified	0.72500	08/10/23	02H/L /009
#52	Cayce, Katherine I	Instructional Aide	Hourly	Classified	0.30000	09/13/21	02H/F/009
#52	Gonzalez, Morlyn	Food Services Assistant	Hourly	Classified	0.71875	08/19/25	02H/M/006
#53	Fogg, Joni L	Instructional Aide - SPED	Hourly	Classified	0.72500	01/11/24	02H/F/011
#54	Gonzalez, Arlyne	Instructional Aide	Hourly	Classified	0.51875	08/19/25	02H/F/008
#55	Marcinko, McKenzie J	Instructional Aide	Hourly	Classified	0.54125	10/06/22	02H/F/026
#56	Paredes, Susana	Instructional Aide - SPED	Hourly	Classified	0.46250	08/18/25	02H/F/009
#57	Pryor, Abigail C	Instructional Aide	Hourly	Classified	0.75625	08/21/24	02H/F/009
#58	Rose, Julianna	Instructional Aide - SPED	Hourly	Classified	0.53125	08/21/25	02H/F/026
#59	Ryan, Colleen M	Instructional Aide - SPED	Hourly	Classified	0.68750	09/09/14	02H/F /011
#60	Van Horn, Darla D	Instructional Aide - SPED	Hourly	Classified	0.68750	09/16/24	02H/F/027
#61	Cortez, Valerie	Instructional Aide	Hourly	Classified	0.51875	08/26/25	02H/F/008
#62	Paredes, Veronica L	Office Assistant	Hourly	Classified	0.70000	10/31/22	02H/D/008
#63	Schletewitz, Rebekah A	Specialist - Art/Librarian	Hourly	Classified	1.00000	08/29/12	SPC HRLY/AS05
#64	Petty, Ellen L	Specialist - Environ Ed & Nutrition	Hourly	Classified	0.36230	10/21/24	SPC HRLY/EEN/ 05
#65	Tran, Khanh	Specialist - Environ Ed & Nutrition	Hourly	Classified	0.27500	02/05/24	SPC HRLY/EEN04
#66	Tran, Khanh	Specialist - Homeschool	Hourly	Classified	0.07500	02/05/24	SPC HRLY/HS/05
#67	Evans, Cody M	Specialist - Information Technology	Hourly	Classified	0.31250	01/01/23	SPC HRLY/ITS/06
#69	Rose, Julianna	Specialist - Music	Hourly	Classified	0.18125	08/21/25	SPC HRLY/AS01
#70	Samuel, Benjamin Y	Specialist - Phys Ed	Hourly	Classified	0.90000	04/27/22	SPC HRLY/PES05
#71	Garcia, Nick	Specialist - ELOP Electives	Hourly	Classified	0.08125	10/16/25	SPC HRLY/AS05
#72	Smith, Laurene	Specialist - Intervention	Hourly	Certificated	0.60000	01/07/26	CL5/11
#73	Beard, Lindsay T	Instructional Aide	Hourly	Classified	0.46875	02/02/26	02H/F/031
#74	Dugatkin Roszkin, Laura	Teacher - EL	Hourly	Certificated	0.01000	01/29/26	02H/F/031

BRIDGES CHARTER SCHOOL

FY25/26 POSITION CONTROL

(as of 5/15/2026)

FAMILY MEMBERS ON STAFF:		
Cindy McCarthy	Lindsay Beard	Mother/Daughter
Dr. Kelly Simon	Darla Van Horn	Mother/Daughter
Veronica Paredes	Susie Paredes	Mother/Daughter
Arlyne Gomez	Morlyn Gonzalez	Sisters

NEW HIRE/POSITION/CHANGE
TERMINATED
OPEN POSITION
SUBSTITUTE

Position #	Last Name / First Name	Position	Salary / Hourly	Certificated / Classified	FTE	Hire Date	Scale
#75	Garcia, Dawn E	Specialist - Music	Hourly	Classified	0.32500	03/12/26	SPC HRLY/MS04
#76	Servera, Emma	Learning Center Coordinator	Salary	Certificated	1.00000	04/17/26	LCC01/02
#77	Fernandez, Olivia	Teacher K 8	Salary	Certificated	1.00000	05/04/26	01/CL5/15
#78	Holz, Nichole	Teacher K 8	Salary	Certificated	1.00000	05/12/26	01/CL5/13
#79	Stolper, Libby	Instructional Aide	Hourly	Classified	0.43750	05/12/26	02H/F/027
TOTAL FTE:					43.75		

BRIDGES CHARTER SCHOOL

FY25/26 POSITION CONTROL

(as of 5/15/2026)

FAMILY MEMBERS ON STAFF:		
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NEW HIRE/POSITION/CHANGE
TERMINATED
OPEN POSITION
SUBSTITUTE

Position #	Last Name / First Name	Position	Salary / Hourly	Certificated / Classified	FTE	Hire Date	Scale
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SUBSTITUTES

Position #	Last Name / First Name	Position	Salary / Hourly	Certificated / Classified	FTE	Hire Date	Scale
SUB01	Sharts, Michele J	Substitute	Hourly	Certificated	Varies	09/02/14	SUBSTITUTE
SUB02	Nelson, Jeanette	Substitute (Food Supervisor)	Hourly	Certificated	Varies	08/20/19	SUBSTITUTE
SUB03	Lynn, Suzanne W	Substitute	Hourly	Certificated	Varies	11/18/24	SUBSTITUTE
SUB04	Chapman, Mitchell A	Substitute	Hourly	Certificated	Varies	02/21/25	SUBSTITUTE
SUB05	Smollin, Leah	Substitute	Hourly	Certificated	Varies	03/17/25	SUBSTITUTE
SUB08	Todesco, Danielle M	Substitute	Hourly	Certificated	Varies	08/21/25	SUBSTITUTE
SUB09	Reszneky, Christina	Substitute	Hourly	Certificated	Varies	08/28/25	SUBSTITUTE
SUB10	Hession, Ashley	Substitute	Hourly	Certificated	Varies	09/17/25	SUBSTITUTE
SUB12	Thompson, Timothy	Substitute	Hourly	Certificated	Varies	02/10/26	SUBSTITUTE
SUB13	Garcia, Dawn E	Substitute	Hourly	Certificated	Varies	02/17/26	SUBSTITUTE

TERMINATED

Position #	Last Name / First Name	Position	Salary / Hourly	Certificated / Classified	FTE	Hire Date	Termed
#17	Delgado, Norma	Teacher	Salary	Certificated	1.00000	07/24/10	07/21/25
#54	Koski, Courtney	Instructional Aide	Hourly	Classified	0.62500	08/18/22	08/13/25
SUB07	Fenske, Stephen	Substitute	Hourly	Certificated	Varies	08/14/25	11/17/25
#16SUB	Foster, Alana	Teacher - 5 (Long-Term Sub)	Daily	Certificated	SUB TERMED	08/11/25	10/17/25
#15	Kingsley, Alan C	Teacher - 4/5	Salary	Certificated	1.00000	08/15/24	10/16/25
#68	Beard, Lindsay T	Specialist - Intervention	Hourly	Classified	1.00000	08/25/14	02/01/26
#26	Thatcher, Susan	Hourly Teacher - Music	Hourly	Certificated	01/00/00	08/20/25	03/11/26
SUB11	Walker, Lance	Substitute	Hourly	Certificated	Varies	09/30/25	5/13/2026
SUB06	Zamora, Carla C	Substitute	Hourly	Certificated	Varies	03/20/25	5/13/2026

Coversheet

Certificate of Amendment of Bridges Articles of Incorporation replacing Article VI

Section: VI. Governing Board
Item: B. Certificate of Amendment of Bridges Articles of Incorporation replacing
Article VI
Purpose: Vote
Submitted by:
Related Material: Certificate_of_Amendment.docx
BCS_Articles_of_Incorporation_Editable__1_.docx

**CERTIFICATE OF AMENDMENT
OF
ARTICLES OF INCORPORATION**

The undersigned certify that:

1. They are the President and Secretary, respectively, of River Oaks Academy Charter School, a California nonprofit public benefit corporation, with California Entity Number 3297990.
2. Article VI. of the Articles of Incorporation of this Corporation is amended to read as follows:
Upon the dissolution or final liquidation of the Corporation, its assets remaining after payment of all debts and liabilities of the Corporation shall be distributed to another public school that meets the requirements of Section III.A of IRS Notice 2015-07 for participation in a governmental plan under Section 414(d) of the Internal Revenue Code, or shall be distributed to the State of California, a political subdivision of the State, or an agency or instrumentality of the State or of a political subdivision of the State.
3. The foregoing amendment of the Articles of Incorporation has been duly approved by the Board of Directors.
4. The Corporation has no members.

We further declare under penalty of perjury under the laws of the State of California that the matters set forth in this certificate are true and correct of our own knowledge.

Date: _____

Maria Montagne, President

Date: _____

, Secretary

[Note: Originally filed as CVOCS, Inc. — name amended to BRIDGES Charter School, October 2009]

ARTICLES OF INCORPORATION
OF
BRIDGES Charter School
(A California Nonprofit Public Benefit Corporation)

I.

The name of the Corporation shall be BRIDGES Charter School.

II.

The Corporation is a nonprofit public benefit corporation and is not organized for the private gain of any person. It is organized under the Nonprofit Public Benefit Corporation Law for public and charitable purposes. The specific purposes for which this Corporation is organized are to manage, operate, guide, direct and promote a California public charter school.

The Corporation is organized and operated exclusively for educational and charitable purposes pursuant to and within the meaning of Section 501(c)(3) of the Internal Revenue Code or the corresponding provision of any future United States Internal Revenue Law. Notwithstanding any other provision of these articles, the Corporation shall not, except to an insubstantial degree, engage in any other activities or exercise of power that do not further the purposes of the Corporation. The Corporation shall not carry on any other activities not permitted to be carried on by: (a) a corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code; or (b) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

III.

The name and address in the State of California of this Corporation's initial agent for service of process is:

Jon Baker
474 Erbes Road
Thousand Oaks, CA 91362

[Note: If this registered agent is no longer current, update via Statement of Information (Form SI-100) filed separately with the CA Secretary of State.]

IV.

All corporate property is irrevocably dedicated to the purposes set forth in the second article above. No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to any of its directors, members, trustees, officers or other private persons except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered, and to make payments and distributions in furtherance of the purposes set forth in Article II.

No substantial part of the activities of the Corporation shall consist of the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

Subject to the provisions of the nonprofit public benefit provisions of the Nonprofit Corporation Law of the State of California, and any limitations in the articles or bylaws relating to action to be approved by the members or by a majority of all members, if any, the activities and affairs of this Corporation shall be conducted and all the powers shall be exercised by or under the direction of the board of directors.

The number of directors shall be as provided for in the bylaws. The bylaws shall prescribe the qualifications, mode of election, and term of office of directors.

V.

The authorized number and qualifications of members of the corporation, if any, the different classes of membership, the property, voting and other rights and privileges of members, and their liability for dues and assessments and the method of collection thereof, shall be set forth in the bylaws.

VI.

[REQUIRES AMENDMENT FOR CaISTRS COMPLIANCE — See Certificate of Amendment] Upon the dissolution or winding up of the Corporation, its assets remaining after payment of all debts and liabilities of the Corporation, shall be distributed to a nonprofit fund, foundation, or association which is organized and operated exclusively for educational, public or charitable purposes and which has established its tax exempt status under Section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a court of competent jurisdiction of the county in which the principal office of the Corporation is then located, exclusively for such purposes or to such organization or organizations, as said court shall determine which are organized and operated exclusively for such purposes.

[PROPOSED REPLACEMENT LANGUAGE — to be adopted by board resolution and filed as Certificate of Amendment]: "Upon the dissolution or final liquidation of the Corporation, its assets remaining after payment of all debts and liabilities of the

Corporation shall be distributed to another public school that meets the requirements of Section III.A of IRS Notice 2015-07 for participation in a governmental plan under Section 414(d) of the Internal Revenue Code, or shall be distributed to the State of California, a political subdivision of the State, or an agency or instrumentality of the State or of a political subdivision of the State."

Dated: July 30, 2009

Andrea C. Sexton, Incorporator

CERTIFICATE OF AMENDMENT — October 2009

Article I of the Articles of Incorporation was amended by board resolution and filed with the California Secretary of State on October 1, 2009, to read as follows:


"The name of the corporation is BRIDGES Charter School."

Signed by: Randall Witt, President; Kathy Jonokuchi, Secretary — Dated: September 11, 2009

Coversheet

BP 3320: Investments

Section: VII. Charter Policies
Item: A. BP 3320: Investments
Purpose: Vote
Submitted by:
Related Material: BP_3320_Investment_Policy_-_Google_Docs.pdf

Bridges Charter School 	Board Policy- <i>Investments</i>	
Policy Number: BP 3320	Adopted: 5/18/2026	Revised:

Board Policy 3320
Adopted/Ratified: 5/18/2026
Revision Date:
PAGE 1 OF 6

Board of Trustees Elections

General comments regarding this sample policy: *Charter schools and charter school management organizations often amass considerable assets, including cash reserves, facilities, equipment, instructional materials, etc. Charter schools generally should seek to invest cash that is not needed for near-term needs to maximize the interest or other gains that may be available on the market while minimizing risk.*

While school districts and other local government agencies in California generally are required to keep their cash in the local county treasury, charter schools presumably are not required to do so, especially if they are incorporated as free-standing nonprofit corporations, as most charter schools are. Some charter schools do opt to maintain cash in their county treasury's investment funds. While these funds can offer sound returns, most are exposed to a modest degree of risk by investing in commercial paper and foreign debt and not all county treasurers will allow charter schools to participate in their investment pools.

Most charter schools with substantial cash reserves invest their reserves that are not needed for near-term obligations in low-risk, interest bearing accounts, certificates, bonds, or securities. These typically include brokerage or money market accounts, certificates of deposit or share certificates, U.S. Treasury Bonds and/or similar securities. To avoid loss of the principal, most invest their funds in accounts or instruments that are either (1) backed by the full faith and credit of the U.S. Government (e.g., U.S. Treasury Bonds) or (2) insured by the Federal Deposit Insurance Corporation (FDIC) or National Credit Union Administration (NCUA).

Some charter schools and management organizations that have very substantial cash reserves (e.g., in excess of \$10 million) may opt to invest part of their reserves in higher-risk instruments in hopes of generating returns that exceed the often-low rates generated by lower risk investments. These typically include broad-based, low-fee stock index or mutual funds.

The sample policy below is drafted to document the board's delegation of investment authority to executive staff, but within defined goals and parameters. It should be drafted and revised to align with other board policies that may touch on the same topic including, but not necessarily limited to policies governing financial management, budgeting, and conflicts-of-interest. The sample language speaks to broad investment policy and does not speak to the details and mechanics of the investment and oversight process—these details presumably should be addressed in related internal controls and accounting procedures to be developed and overseen by staff.

The Corporations Code specifically authorizes the board to delegate investment authority, so long as the investment decisions are under the ultimate direction of the board. CC §§ 5420, 5210.

I. Investment Authority

A. Delegation of Authority to Invest

From time-to-time, Bridges Charter School has assets in excess of its anticipated near-term needs. This policy governs the investment of such funds determined to be in excess of near-term needs. If applicable state or federal law conflicts with this policy, the applicable state or federal laws shall prevail.

The Board of Directors of Bridges Charter School (“**Board**”) authorizes the Executive Director to invest assets in accord with this policy, to purchase and sell investments and instruments, allow wire transfers, and execute documents necessary to implement this policy.

B. Controls and Oversight of Investments

The California Corporations Code (CC § 5240) applies to assets held by the corporation for investment. Assets that are directly related to the corporation’s public or charitable programs are not subject to the Code. In investing, reinvesting, purchasing, acquiring, exchanging, selling and managing the corporation’s investments, the board is required to do the following: 1) Avoid speculation, looking instead to the permanent disposition of the funds, considering the probable income, as well as the probable safety of the corporation’s capital; 2) Comply with additional standards, if any, imposed by the articles, bylaws or express terms of an instrument or agreement pursuant to which the assets were contributed to the corporation.

In complying with these requirements, directors are required to perform these duties in a manner that the director believes to be in the best interests of the corporation and with such care, including reasonable inquiry, as an ordinary prudent person in a like position would use under similar circumstances. (CC §§ 5240, 5231) The Corporations Code specifically states that directors may rely upon others, such as counsel, independent accountants or other professionals, and officers or employees that the directors believe to be reliable and competent in the matters presented. When following these edicts, directors have the benefit of a shield from personal liability.

Investments made in compliance with the Uniform Prudent Management of Institutional Funds Act found in the California Probate Code (§§ 18501, et seq.) are deemed in compliance with these requirements.

The Executive Director shall ensure that written internal controls policies and procedures are developed and implemented to ensure that investments are made

in accord with this policy, that prevent losses of assets that may arise from fraud, error, misrepresentation, or imprudent action and that investments avoid speculation, looking instead to the permanent disposition of the funds, considering the probable income, as well as the probable safety of the corporation's capital.

The Board shall receive and review information on investment balances, allocations, and returns at least quarterly, and the Board shall review a summary report at least annually.

The officers and employees involved in the investment process shall refrain from any conflicts of interest in the management of the school's investments and shall have no interest in, nor receive any compensation nor inducements from any of the school's investments nor those involved in selling or managing those investments. All investment activity shall be in accordance with applicable laws governing conflicts of interest and the organization's Conflict-of-Interest Policies

II. Maintaining Liquidity

A. Estimating Future Liquidity Needs

The Executive Director shall annually, or more frequently as needed, prepare or cause to be prepared cash flow projections that anticipate Bridges Charter School's near-term cash position. The projections shall identify the amounts of cash and other assets needed to ensure that Bridges maintains available cash reserves in alignment with levels specified in budgeting and financial policies, debt covenants, agreements with the charter authorizing agency, or other binding commitments. These shall be held on deposit in cash or cash-equivalent operating accounts at all times while also remaining current on all accounts payable and other obligations.

B. Amounts Available for Investment

Amounts in excess of those needed to remain liquidity may be invested in longer-term investments identified below so as to meet the objectives listed below.

III. Objectives

The objectives of this investment policy include the following:

1. Safety of Principal – Funds should be invested to preserve the principal in the overall portfolio.
2. Liquidity – Funds should be invested to ensure that the school can meet its anticipated cash liquidity needs based on reasonably detailed cash flow

projections.

3. Return on Investments – Funds should be invested to attain the highest market returns relative to risk constraints, with a goal of achieving a maximum rate of return relative to the market at that the time of the investment and while ensuring liquidity.
4. Maintaining the Public’s Trust – Funds should be invested so as to act as responsible custodians of public funds and avoid transactions that would undermine public confidence in the school, its board, officers, and employees. Investments of donated assets shall conform to any related instrument or agreement pursuant to which the assets were donated to Bridges Charter School.

IV. Investment Standards and Approved Investment Instruments

Individuals responsible shall manage and invest in good faith and with the care that an ordinary and prudent person would exercise under similar circumstances. Bridges Charter School may only incur costs that are reasonable in relation to the assets being managed, considering the skills and expertise available to the school, and shall make a reasonable effort to verify facts relevant to the management and investment of assets.

Individuals responsible for managing and investing assets must consider the following:

- General economic conditions,
- The possible effects of inflation or deflation,
- Expected tax consequences, if any,
- The role that each investment or course of action plays relative to Bridges Charter School’s overall investments,
- The expected total return from income and appreciation of investments,
- The needs of Bridges Charter School to make distributions and preserve capital, and
- An asset’s special relationship or special value, if any, to the charitable purposes of Bridges Charter School.

In alignment with this policy, Bridges Charter School may invest in the following forms of investment instruments in alignment with the objectives listed above and to the extent allowed by applicable law:

- Bonds, notes, and treasury bills and other securities issued by and backed by the full faith and credit of the United States of America and its agencies.
- Interest-bearing savings accounts, checking accounts, cash management accounts, and certificates of deposit that are insured by the Federal Deposit

Insurance Corporation.

Note: *The instruments listed above are among the most conservative and near risk-free investments available on the market. They also generally generate the lowest investment returns. Some schools/organizations with more substantial assets and cash reserves are in a position to incur higher levels of risk, and presumably generate more substantial returns by investing in other instruments including corporate bonds, certificates of deposit from foreign banks, stocks/equities, etc. Schools/organizations doing so presumably may want to obtain professional advice and expand this sample policy to list the specific approved instruments. It presumably is also a good practice to set specific percentage or dollar limits on the percentage or amounts of the organization's funds that may be invested in such higher risk instruments.*

- **[insert or list additional approved investment instruments, specify limits on the percent of total invested funds and/or specify specific dollar limits on the amount of funds that may be invested in additional, higher risk/return investments]**

All investments shall be made in the name of Bridges Charter School.

Adopted:

Amended:

Coversheet

Replacement Policy: BP 5141.2 Extreme Weather Conditions

Section: VII. Charter Policies
Item: B. Replacement Policy: BP 5141.2 Extreme Weather Conditions
Purpose: Vote
Submitted by:
Related Material: BCS_BP5141_2_ExtremeWeather_TrackedChanges.docx

Bridges Charter School	Board Policy-
	Extreme Weather Conditions <u>Extreme Weather Conditions</u> <i>(formerly: Hot Weather Conditions)</i>
Policy Number: BP 5141.2	Adopted: 10/23/17 Revised: <u>[Board Adoption Date]</u>

TRACKED CHANGES LEGEND

Blue underlined text = New language added to meet July 1, 2026 extreme weather protocol requirements

~~Red strikethrough text~~ = Existing language removed or replaced

Black text = Existing language retained unchanged

Authority: This policy is adopted pursuant to the requirement under California law that public schools, including charter schools, adopt protocols for addressing extreme weather conditions by July 1, 2026. This policy supersedes and replaces BP 5141.2 Hot Weather Conditions (adopted 10/23/17) and expands its scope to address all forms of extreme weather as defined below.

Bridges Charter School is concerned about the welfare of students and has developed some basic guidelines related to ~~hot-weather~~extreme weather conditions. A high level of student activity can affect a student’s ability to learn and can create health problems for some students on unusually ~~hot~~severe weather days.

Definition. For purposes of this policy, “extreme weather conditions” means occurrences of unusually severe weather conditions — including extreme heat, excessive precipitation, and floods — which may pose significant harm to pupils. This policy applies to all outdoor activities including P.E. classes, recess, lunch, before- and after-school programs, and school-sponsored events and activities.

1. The school has a thermometer in place to read outside temperatures.
2. Weather Monitoring. The Director or designee shall monitor weather forecasts and alerts on a proactive basis to anticipate extreme weather conditions. The school shall use the following tools for daily monitoring:
 - The National Weather Service (NWS) HeatRisk Forecast tool (weather.gov) for a 7-day forecast of heat risk levels specific to the school’s location.
 - The California Department of Public Health (CDPH) Heat Risk Grid, which identifies risk levels and recommended actions based on HeatRisk data.

- [National Weather Service alerts, watches, warnings, and advisories for Ventura County, including heat advisories, excessive heat warnings, flood watches, and related alerts.](#)

~~3.~~ ~~2.~~—When temperatures are between 85° and 95°, the director will evaluate weather conditions related to temperature such as shade structure, breeze factor, humidity and pollutants. A decision will be made concerning a reduction in directed physical activities.

~~4.~~ ~~3.~~—When temperatures are 95° and above, the director should consider a reduction in PE activities such as running, jumping, prolonged exposure to the sun. Activities should be adjusted to reduce strenuous exercises. Lunch should be under shade structures or in a classroom/building, with limited time given for free outdoor play.

~~5.~~ ~~4.~~—When temperatures reach 100° or over, outside PE activities will be discontinued. [The Director or designee shall designate appropriate indoor alternative activities for affected classes and programs.](#)

~~6.~~ ~~5.~~—High humidity is a factor related to the comfort level and can increase possible harmful effects of hot weather on students. When the relative humidity reaches 50% the above temperatures should be lowered by 5° when considering or taking action.

~~7.~~ ~~6.~~—With all warm days, teachers and aides should be encouraged to remind students to reduce running/exertion activities and allow any student who complains of overheating to go to the office for rest and observation. With direct sun, certain areas of a school site may increase heat exposure, such as blacktop or concrete areas. Caution should be taken to observe all students for signs of overexposure.

~~8.~~ ~~7.~~—Students who are abnormally affected by high temperatures and humidity should be given special consideration, and require follow-up by the school health clerk. These students are identified by parents, health providers, teachers and outdoor activity staff.

~~9.~~ ~~8.~~—The health office of each school has written procedures on actions to be taken should a student become ill due to high temperature/humidity. Health clerks have also been instructed on action to take when they believe a student has been negatively affected by heat.

~~10.~~ ~~9.~~—The school should develop activities which students may be involved in during critical temperature periods.

~~11.~~ [Non-Heat Extreme Weather Conditions. In the event of extreme precipitation, flooding, or other severe weather conditions posing a risk to student safety, the Director or designee shall:](#)

- [Restrict or cancel outdoor activities as appropriate to protect student safety.](#)
- [Move students and staff to designated indoor spaces.](#)
- [Monitor alerts from the National Weather Service and Ventura County Office of Emergency Services.](#)

- Coordinate with the Ventura County Fire Department and local emergency agencies as needed.

12. Communication. When outdoor activities are modified or cancelled due to extreme weather conditions, the Director or designee shall notify staff, pupils, and parents or guardians through the school's established communication platforms (ParentSquare and school email) in a timely manner. Notifications shall include the nature of the weather condition, the changes being made to outdoor activities, and any indoor alternative plans.

13. Staff Training. The Director or designee shall ensure that all staff receive annual training on recognizing signs of weather-related distress in pupils and appropriate response measures. Training shall include:

- Recognition of symptoms of heat exhaustion, heat stroke, hypothermia, and other weather-related illness.
- First aid response procedures.
- How to use the NWS HeatRisk tool and CDPH Heat Risk Grid.
- Procedures for modifying or ceasing outdoor activities under this policy.

14. Coordination with Local Agencies. The Director or designee shall establish and maintain contact with relevant local agencies to ensure timely access to weather-related information and resources, including the National Weather Service Los Angeles/Oxnard office, the Ventura County Fire Department, and the Ventura County Office of Emergency Services. The Director or designee shall consult with these agencies when developing or updating protocols under this policy.

These guidelines are not to be considered exhaustive. Reason and good judgment must be used at each site to protect students and to indicate to parents and the community that the district continues to provide a safe environment for students.

Annual Review. This policy shall be reviewed annually by the School Safety Committee and presented to the Board of Directors for approval. The review shall incorporate any updated standardized guidelines issued by the California Department of Education (CDE) or the California Department of Public Health (CDPH) regarding extreme weather protocols.

BP 5141.2 Extreme Weather Conditions (formerly: Hot Weather Conditions) Adopted: 10/23/17 Revised: [Board Adoption Date]

Coversheet

Addendum to Comprehensive School Safety Plan — Refuge Shelter Identification Procedure (AB 2968)

Section: VII. Charter Policies
Item: C. Addendum to Comprehensive School Safety Plan — Refuge Shelter Identification Procedure (AB 2968)
Purpose: Vote
Submitted by:
Related Material: BCS_Safety_Plan_Refuge_Shelter_Addendum.docx

BRIDGES Charter School
2025–2026 Comprehensive School Safety Plan
ADDENDUM — Refuge Shelter Identification Procedure

Authority and Applicability

This addendum is adopted pursuant to AB 2968 (Chapter 589, Statutes of 2024), which amends Education Code Section 32282 to require all public schools, including charter schools, to establish a procedure to identify an appropriate refuge shelter for all pupils and staff in the event of an evacuation order by local authorities, commencing with the 2026–2027 fiscal year. This procedure is incorporated into and made part of the Bridges Charter School Comprehensive School Safety Plan adopted February 9, 2026.

Designated Refuge Shelter

Bridges Charter School has designated the following location as its primary refuge shelter for all pupils and staff in the event of an evacuation order by local authorities:

PRIMARY REFUGE SHELTER
Conejo Creek North Park
1379 E Janss Road, Thousand Oaks, CA 91362
Managed by: Conejo Recreation & Park District | (805) 495-6471
Open daily 7:00 AM – 7:00 PM | Public restrooms on site | Ample parking available

Rationale for Designation

Conejo Creek North Park was selected as the designated refuge shelter because it is a large, publicly accessible open space located approximately 1.5 miles from the Bridges Charter School campus; it is open during all school hours; it has ample open ground suitable for sheltering a large group of students and staff; it includes public restrooms and parking to facilitate parent reunification; and as a public park managed by the Conejo Recreation and Park District, it is reliably available without the need for a private access agreement.

Evacuation Procedure

In the event of an evacuation order issued by local authorities (Ventura County Fire Department, Ventura County Sheriff’s Office, or other authorized agency), the following steps shall be taken:

1. The Director or designee shall initiate the school’s evacuation signal and direct all students and staff to evacuate the campus immediately in an orderly manner.

2. The Director or designee shall immediately notify the Ventura County Fire Department at (805) 371-1111 that Bridges Charter School is evacuating to Conejo Creek North Park, 1379 E Janss Road, Thousand Oaks, as the designated refuge shelter.
3. Staff shall take attendance rosters and student emergency contact information. The priority upon reaching the refuge shelter is the safety of all pupils and staff.
4. The Information Coordinator (Director of Daily Operations or Director of Student Support) shall notify parents and guardians via ParentSquare of the evacuation and the refuge shelter location as soon as practicable.
5. Student release at the refuge shelter shall follow the school's standard student reunification procedures. No student shall be released without proper identification and authorization.
6. The Director or designee shall remain in contact with local authorities and shall not authorize return to campus until an all-clear has been issued by the appropriate local authority.

Students with Disabilities

Evacuation procedures shall account for the needs of students with disabilities consistent with existing school safety plan provisions, the Americans with Disabilities Act, IDEA, and Section 504. Staff assigned to assist students with disabilities shall be identified in advance and shall rehearse their role at each emergency drill. Conejo Creek North Park is ADA accessible.

Required Notification to Local Fire Authority

Consistent with AB 2968, Bridges Charter School shall notify the Ventura County Fire Department of this designated refuge shelter location. The Director or designee shall contact the Ventura County Fire Department at (805) 371-1111 to provide notice of this designation. This notification shall be renewed annually when the Comprehensive School Safety Plan is updated.

Annual Review

This refuge shelter designation shall be reviewed annually as part of the Comprehensive School Safety Plan review process. The School Safety Committee shall confirm that the designated refuge shelter remains appropriate and accessible, and shall update the designation if circumstances change.

Adopted by the Bridges Charter School Board of Directors

Date of Adoption: _____

Board President Signature Date

Director Signature Date

This addendum is incorporated into the BCS 2025–2026 Comprehensive School Safety Plan and shall be inserted following the Disaster Procedures section. It shall be presented to the Board for adoption and filed with VCOE.

Coversheet

Resolution: Authorization to Open Investment Account with Westlake Private Wealth Management

Section: VIII. Business and Operations

Item: A. Resolution: Authorization to Open Investment Account with Westlake
Private Wealth Management

Purpose: Vote

Submitted by:

Related Material:

Resolution_of_the_Board_of_Directors_of_Bridges_Charter_School_Authorization_to_Open_Inves
tment_Account_-_Google_Docs.pdf

Associated_Person_Information.pdf

What_We_Do.pdf

Who_We_Are.pdf

Stephen_Meli_Bio.pdf

Keys_to_a_Successful_Relationship.pdf



1335 Calle Bouganvilla Thousand Oaks, California 91360 805.492.3569 www.bridgescharter.org

Resolution of the Board of Directors of Bridges Charter School Authorization to Open Investment Account

WHEREAS, the Board of Directors of Bridges Charter School ("the School") has determined it to be in the best financial interest of the School to establish an investment account with Westlake Private Wealth Management, an independent advisory practice operating through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC; and

WHEREAS, the Board has reviewed the services, investment tiers, and fee structure offered by Westlake Private Wealth Management and finds them appropriate for the School's financial needs and investment objectives; and

WHEREAS, the Board wishes to designate authorized signers and establish the scope of authority for management of said account;

NOW, THEREFORE, BE IT RESOLVED that the Board of Directors of Bridges Charter School hereby:

1. **Authorizes** the opening of an investment account with Westlake Private Wealth Management / Wells Fargo Advisors Financial Network, LLC, on behalf of Bridges Charter School;
2. **Designates** the following individuals as authorized signers on the account:
 - Kelly Simon, Executive Director
 - Cindy McCarthy, Director of Daily Operations
 - Katerina Yevmenkina, Board President
 - Nikki Hashemi, Board Vice President
3. **Requires** that transactions exceeding \$10,000 require the signature or approval of two authorized signers;
4. **Authorizes** the designated signers to execute all account opening documents, including but not limited to the Associated Person Information form and any related Wells Fargo Advisors Financial Network account agreements, on behalf of the School;
5. **Acknowledges** that the Board has reviewed the applicable fee schedule and advisory disclosure documents provided by Westlake Private Wealth Management; and

6. **Directs** the [Executive Director / Business Manager] to maintain copies of all executed account documents on file and to report account activity to the Board no less than [quarterly / annually].

BE IT FURTHER RESOLVED that this authorization shall remain in effect until rescinded or modified by action of the Board of Directors.

Adopted by the Board of Directors of Bridges Charter School at a duly noticed public meeting held on May 18th, 2026.

Ayes: ____ Noes: ____ Abstentions: ____

_____ *Board President Signature*

_____ *Board Secretary Signature*

Associated Person Information



Sub Firm #	BR Code	FA Code	Account Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>(Office Use Only)</i>			

New
 Update

Associated Person Information

<input type="checkbox"/> Individual <input type="checkbox"/> Non-Personal				
Name (First, Middle, Last)				
Legal Address - Cannot be a P.O. Box				
City			State	ZIP
Home Phone	Business Phone	Fax Number	Other Number	
SSN/Tax ID	Birth Date	Occupation Description	Other Description <i>(required)</i>	
Country of Citizenship/Registration	State of Registration	Permanent U.S. Resident? <input type="checkbox"/> Yes <input type="checkbox"/> No	Email Address	
Government ID Type	Government ID Number	Government ID Place of Issue	Date of Issue	Expiration Date
FINRA Information	Is Client, Client's Spouse, or immediate relative employed by Wells Fargo Advisors or another FINRA Member or any other financial services company?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If "Yes," enter Class Code (Definitions on page 3).	Class Code <input type="text"/>
If Class Code "W," indicate name of other registered broker-dealer firm _____				
RULE 144: Is authorized person, or member of their immediate family a director, policymaking officer, or 10% stockholder in any publicly traded company?		<input type="checkbox"/> Yes <input type="checkbox"/> No	If "Yes," indicate company ticker symbol or name. _____	

Non-Individual Account Owner

Is legal entity publicly traded? <input type="checkbox"/> No <input type="checkbox"/> Yes		Is the legal entity regulated by Federal Regulator? <input type="checkbox"/> No <input type="checkbox"/> Yes		
Exchange Name	Country of Exchange	Exchange Description		
Sales Market	Sales Market State(s)	Sales Market Country(ies)		
Business Type: <input type="checkbox"/> Corporation <input type="checkbox"/> Govt. Unit or Agency <input type="checkbox"/> Indian Tribal Govt. <input type="checkbox"/> Limited Liability Co. <input type="checkbox"/> Limited Partnership <input type="checkbox"/> Limited Liability Partnership <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Trust Co. <input type="checkbox"/> Unicorp Assn./Social/Rec/Civic Group/Non-Profit		Business Subtype: <input type="checkbox"/> Business Trust <input type="checkbox"/> Multinational Corp. <input type="checkbox"/> Corporation <input type="checkbox"/> Domestic <input type="checkbox"/> Federal <input type="checkbox"/> Foreign <input type="checkbox"/> General Partnership <input type="checkbox"/> Joint Venture Partnership <input type="checkbox"/> Limited Liability Partnership <input type="checkbox"/> Local <input type="checkbox"/> Professional Corp. <input type="checkbox"/> Professional Limited Liability Partnership <input type="checkbox"/> State		
NAIC Industry (Select up to 3): <input type="checkbox"/> Agriculture, Forestry, Fishing, and Hunting <input type="checkbox"/> Mining <input type="checkbox"/> Utilities <input type="checkbox"/> Construction <input type="checkbox"/> Food/Textile Manufacturing <input type="checkbox"/> Wood/Plastic/Glass/Chemical Manufacturing <input type="checkbox"/> Metal/Machinery Manufacturing <input type="checkbox"/> Wholesale Trade <input type="checkbox"/> Durable Goods/Housewares/Clothing/Food <input type="checkbox"/> Department Stores/General Merchandise Stores <input type="checkbox"/> Transportation <input type="checkbox"/> Warehousing and Storage <input type="checkbox"/> Information <input type="checkbox"/> Finance and Insurance <input type="checkbox"/> Real Estate Rental and Leasing <input type="checkbox"/> Professional, Scientific, and Technical Services <input type="checkbox"/> Management of Companies and Enterprises <input type="checkbox"/> Administrative and Support and Waste Management and Remediation Services <input type="checkbox"/> Educational Services <input type="checkbox"/> Health Care and Social Assistance <input type="checkbox"/> Arts, Entertainment, and Recreation <input type="checkbox"/> Accommodation and Food Services <input type="checkbox"/> Other Services (except Public Administration) <input type="checkbox"/> Public Administration				

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN). Accounts are carried by Wells Fargo Clearing Services, LLC (WFCS). Wells Fargo Advisors is a trade name used by WFAFN and WFCS, Members SIPC, separate registered broker-dealers and non-bank affiliates of Wells Fargo & Company.

NAIC Sub-Industry (1)*
NAIC Sub-Industry (2)*
NAIC Sub-Industry (3)*
<p><i>*For information regarding NAICS Industry Codes, please visit the following website https://www.census.gov/naics and use the 2022 NAICS Search feature to locate potential industry code descriptions.</i></p> <p>NAIC (North American Industry Classification System) - Required for non-individual clients. NAICS codes are a standard used by federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.</p>

Person of Interest/High Risk Indicators				
U.S. Non-Individual (Select up to 5 indicators that apply to this account owner.)	<input type="checkbox"/> CASINO (5B)	<input type="checkbox"/> GUN DLR/FIREARMS (5E)	<input type="checkbox"/> FOREIGN NGO (5F)	<input type="checkbox"/> TRAVEL AGENT (5A)
	<input type="checkbox"/> GEM/PREC MTL DLRS (5C)	<input type="checkbox"/> MONEY SERVICE BUS (5D)	<input type="checkbox"/> PEP-FOREIGN (5G)	<input type="checkbox"/> NOT APPLICABLE (00)
U.S. Individual (Select all that apply.)	<input type="checkbox"/> PEP (3A)	<input type="checkbox"/> NOT APPLICABLE (00)		
Foreign Non-Individual (Select up to 5 indicators that apply to this account owner.)	<input type="checkbox"/> CASINO (6B)	<input type="checkbox"/> FOR PERS INV/HOLDING CO (6H)		
	<input type="checkbox"/> FFI (6L)	<input type="checkbox"/> FOREIGN TRUST (6I)	<input type="checkbox"/> MONEY SERVICE BUS (6D)	
	<input type="checkbox"/> FOR FIN INTERMEDIARY (6M)	<input type="checkbox"/> GEM/PREC MTL DLRS (6C)	<input type="checkbox"/> FOREIGN NGO (6K)	<input type="checkbox"/> TRAVEL AGENT (6A)
	<input type="checkbox"/> FOR OPERATING CO (6G)	<input type="checkbox"/> GUN DLR/FIREARMS (6F)	<input type="checkbox"/> PEP-FOREIGN (6N)	<input type="checkbox"/> NOT APPLICABLE (00)
Foreign Individual (Select all that apply.)	<input type="checkbox"/> FOR FIN INTERMEDIARY (3B)	<input type="checkbox"/> PEP (3A)	<input type="checkbox"/> NON-RESIDENT ALIEN (3C)	<input type="checkbox"/> NOT APPLICABLE (00)

Authorized Signature			
<i>I have read the above information and confirm that it is accurate to the best of my knowledge.</i>			
Associated Person Signature			Date
Internal Use	Financial Advisor Signature	FA Code	
	Principal Approver Signature	Principal Rep Code	Date

For the categories of personal data that Wells Fargo may collect and how we use it, see the Wells Fargo California Consumer Privacy Act Notice at Collection at <https://www.wellsfargo.com/privacy-security/notice-of-data-collection/>. See additional Wells Fargo privacy notices at <https://www.wellsfargo.com/privacy-security/>.

Government ID Description		
AI Articles of Incorporation	EC Employer ID Card	PC Permanent Resident Card
AO Articles of Organization (LLC)	ED Estate/Court Documents	PP Passport
AR Adoption Record	FD Foreign Issued ID - Non-Driver	RA Resident Alien ID Card (Green Card)
BC Birth Certificate	FL Foreign Driver's License*	SC School ID Card
BD Border Crossing Card*	HC Health Insurance Card (No Medicare Card)	ST State ID Card
BL Business License	LP Life Insurance Policy	TI Tribal ID
BV B1B2 Visa	MD Marriage or Divorce Record	TP Trustee Certification of Investment Powers
CD Court Document	MR Armed Forces	TR Trust Document
CE Cedula	ND Non-Documentary	
CI Consular ID Card	NI National ID Card	
DL Driver's License	OA Operating Agreement	
EA Employment Authorization Card	PA Partnership Agreement	

*** If Border Crossing Card or Foreign Driver's License is selected, both Border Crossing Card and Foreign Driver's License forms of ID are required.**

Class Codes Descriptions (Do not enter "N" for "No" in the Class Code field • please leave blank.)

- U Employees of Wells Fargo Advisors, their spouse, dependent children, or any other person** who is supported directly or indirectly to a material extent by the employee. Also included are accounts in which any of these individuals has a financial or beneficial control or interest such as guardian, custodian, trustee, executor, corporate or legal officer or agent, investment clubs, joint accounts, or partnerships.
- V Non-dependent immediate family members of an employee of Wells Fargo Advisors, which include:** non-dependent children, parents, parents-in-law, brothers or sisters, brothers-in-law or sisters-in-law, sons-in-law or daughters-in-law, children or other persons supported directly or indirectly to a material extent by any of these individuals, and any accounts in which they have a financial or beneficial control or interest such as guardian, custodian, trustee, executor, corporate or legal officer or agent, investment clubs, joint accounts, or partnerships.
- W Employees or brokers of other security firms,** their dependent accounts and accounts in which they have a financial or beneficial control or interest, such as guardian, custodian, trustee, executor, corporate or legal officer or agent, investment clubs, joint accounts, or partnerships. You understand that if you are associated with another member or member organization, WFA may notify your employer in writing of your intention to open and/or maintain an account. We will transmit duplicate copies of confirmations and statements or other similar information with respect to the account to your employing member as required by regulation.
- Y Associates of Wells Fargo & Company, their spouse, dependent children, or any other person** who is supported directly or indirectly to a material extent by the associate. Also included are accounts in which any of these individuals has a financial or beneficial control or interest such as guardian, custodian, trustee, executor, corporate or legal officer or agent, investment clubs, joint accounts, or partnerships.
- Z Non-dependent immediate family members of an associate of Wells Fargo & Company, which include:** non-dependent children, parents, parents-in-law, brothers or sisters, brothers-in-law or sisters-in-law, sons-in-law or daughters-in-law, children or other persons supported directly or indirectly to a material extent by any of these individuals, and any accounts in which they have a financial or beneficial control or interest such as guardian, custodian, trustee, executor, in which they have a financial corporate or legal officer or agent, investment clubs, joint accounts, or partnerships.

Occupation Description

A Proprietor, Professional, Managerial	D Sales	I Education	N Student
B Information Technology Systems	E Administrative, Clerical	J Clergy	P Homemaker
C Craftsman, Skilled Worker	F Public Service	K Other*	* Description is required
	G Personal Service Provider	L Unemployed	
	H Farming, Fishing, Forestry	M Retired	

Person of Interest/High Risk Indicator Descriptions

U.S. Non-Individual:

CASINO (5B) - A domestic or foreign entity licensed as a casino, gambling casino, or gaming establishment under the laws of any U.S. state or foreign jurisdiction or any political subdivision of the foregoing.

GEM/PREC MTL DLRS (5C) - A domestic or foreign person or entity who purchases and sells: jewels; precious metals and stones; and finished goods.

This category includes, but is not limited to, jewelry, coins, and antiques.

GUN DLR/FIREARMS (5E) - A foreign or domestic based business or entity where the primary business involves the sale of guns, weapons, and/or firearms.

MONEY SERVICE BUS (5D) - An agent, agency, branch, or office of any person or entity located within the U.S. doing business in one or more of the following capacities: currency dealer or exchanger; check casher; issuer of traveler's checks, money orders, or electronic cards with a stored monetary value; seller or redeemer of traveler's checks, money orders, or electronic cards with a stored monetary value; money transmitter; and the United States Postal Service (except with respect to the sale of postage or philatelic products); that is **not** 25% or more owned by a Mexican casa de cambio, which is a nonbank financial institution (currency exchanger) that provides a variety of financial services and is regulated by the Mexican government. Exception: Persons or entities (other than money transmitters) who do not exchange currency, cash checks, or issue, sell, or redeem traveler's checks, money orders, or electronic cards with a stored monetary value in an amount greater than \$1,000 to any person or entity on any day in one or more transactions are not MSB(s).

FOREIGN NGO (5F) - A domestic or foreign private, nonprofit organization that pursues activities intended to serve the public good that is not funded 100% by the U.S. government. Includes charities, foundations, religious organizations, and other non-profit organizations. NGOs may provide basic social services, work to relieve suffering, promote the interests of the poor, bring citizen concerns to governments, encourage political participation, protect the environment, or undertake community development to serve the needs of citizens, organizations, or groups in one or more of the communities that the NGO operates.

PEP-FOREIGN (5G) - A current or former senior official in the executive, legislative, administrative, military, or judicial branches of a foreign government (whether elected or not); a senior official of a major foreign political party; a current or former senior executive of a foreign government-owned corporation; an immediate family member of any individual listed above; a "close associate" of a current or former senior foreign political figure who is widely and publicly known (or is actually known by the Firm) to maintain an unusually close relationship with this individual and is a position to conduct substantial domestic and international business. Domestic PEP includes any current or former senior official in the executive, legislative, administrative, military, or judicial branches of the U.S. or state government. Accounts for PEPs with ties to the current Venezuelan government are prohibited.

TRAVEL AGENT (5A) - Any domestic or foreign entity who sells, as an agent, the following travel services: airline or rail tickets; hotel and motel reservations; cruise reservations; and/or some combination of those services.

NOT APPLICABLE (00)

U.S. Individual:

PEP (3A) - Domestic PEP includes any current or former senior official in the executive, legislative, administrative, military, or judicial branches of the U.S. or state government.

NOT APPLICABLE (00)

Foreign Non-Individual:

CASINO (6B) - A domestic or foreign entity licensed as a casino, gambling casino, or gaming establishment under the laws of any U.S. state or foreign jurisdiction or any political subdivision of the foregoing.

FFI (6L) - Any entity that: is organized under the laws of a foreign country; and engages in the business of: banking; securities dealing; brokerage; investment management; or insurance. *Note:* This category includes foreign: banks; mutual funds; hedge funds; futures merchant commissions; broker-dealers; and insurance companies.

FOR FIN INTERMEDIARY (6M) - Includes: a foreign individual that act as a financial liaison for its own clients, includes lawyers, accountants, investment brokers, and other third parties that act as financial liaisons for their clients; or any entity other than a foreign financial institution which: is organized under the laws of a foreign country; and engages in the business of providing investment, tax, or legal advice.

FOR OPERATING CO (6G) - Foreign businesses that are: established in a country other than the United States; are not publicly traded on a recognized U.S. exchange; and are engaged in verifiable business activity.

FOR PERS INV/HOLDING CO (6H) - Includes legal entities: organized under the laws of a country other than the U.S.; and formed to hold client assets and maintain client confidentiality by opening accounts in the name of the PIC or the PHC.

FOREIGN TRUST (6I) - A trust established outside the U.S. that is governed by the laws of a jurisdiction other than the U.S.

GEM/PREC MTL DLRS (6C) - A domestic or foreign person or entity who purchases and sells: jewels; precious metals and stones; and finished goods. This category includes, but is not limited to, jewelry, coins, and antiques.

GUN DLR/FIREARMS (6F) - A foreign or domestic based business or entity where the primary business involves the sale of guns, weapons, and/or firearms.

MONEY SERVICE BUS (6D) - An agent, agency, branch, or office of any person or entity located within the U.S. doing business in one or more of the following capacities: currency dealer or exchanger; check casher; issuer of traveler's checks, money orders, or electronic cards with a stored monetary value; seller or redeemer of traveler's checks, money orders, or electronic cards with a stored monetary value; money transmitter; and the United States Postal Service (except with respect to the sale of postage or philatelic products); that is not 25% or more owned by a Mexican casa de cambio, which is a nonbank financial institution (currency exchanger) that provides a variety of financial services and is regulated by the Mexican government. Exception: persons or entities (other than money transmitters) who do not exchange currency, cash checks, or issue, sell, or redeem traveler's checks, money orders, or electronic cards with a stored monetary value in an amount greater than \$1,000 to any person or entity on any day in one or more transactions are not MSB(s).

FOREIGN NGO (6K) - A domestic or foreign private, nonprofit organization that pursues activities intended to serve the public good that is not funded 100% by the U.S. government. Includes charities, foundations, religious organizations, and other non-profit organizations. NGOs may provide basic social services, work to relieve suffering, promote the interests of the poor, bring citizen concerns to governments, encourage political participation, protect the environment, or undertake community development to serve the needs of citizens, organizations, or groups in one or more of the communities that the NGO operates.

PEP- FOREIGN (6N) - Foreign PEP includes: a current or former senior official in the executive, legislative, administrative, military, or judicial branches of a foreign government (whether elected or not); a senior official of a major foreign political party; a current or former senior executive of a foreign government-owned corporation; an immediate family member of any individual listed above; a "close associate" of a current or former senior foreign political figure who is widely and publicly known (or is actually known by the Firm) to maintain an unusually close relationship with this individual and is in a position to conduct substantial domestic and international business. Accounts for PEPs with ties to the current Venezuelan government are prohibited..

TRAVEL AGENT (6A) - Any domestic or foreign entity who sells, as an agent, the following travel services: airline or rail tickets; hotel and motel reservations; cruise reservations; and/or some combination of those services.

NOT APPLICABLE (00)

Foreign Individual:

FOR FIN INTERMEDIARY (3B) - Includes: a foreign individual that act as a financial liaison for its own clients, includes lawyers, accountants, investment brokers, and other third parties that act as financial liaisons for their clients; or any entity other than a foreign financial institution which is organized under the laws of a foreign country; and engages in the business of providing investment, tax, or legal advice.

PEP (3A) - A PEP includes: a current or former senior official in the executive, legislative, administrative, military, or judicial branches of a foreign government (whether elected or not); a senior official of a major foreign political party; a current or former senior executive of a foreign government-owned corporation; an immediate family member of any individual listed above; a "close associate" of a current or former senior foreign political figure who is widely and publicly known (or is actually known by the Firm) to maintain an unusually close relationship with this individual and is in a position to conduct substantial domestic and international business. Accounts for PEPs with ties to the current Venezuelan government are prohibited.

NON-RESIDENT ALIEN (3C) - An alien is any individual who is not a U.S. citizen or U.S. national.

NOT APPLICABLE (00)

Business Type/Subtype

Business and Business Subtype are required for non-individual clients to classify the entity appropriately. The business formation will determine the business and business subtype category.

Business Type Codes

C Corporation
G Government Unit or Agency
I Indian Tribal Government
L Limited Liability Company
N Limited Partnership
O Limited Liability Partnership
P Partnership
S Sole Proprietor
T Trust Company
U Unicorp Association/Social/Rec/Civic Group/Non-Profit

Business Subtype Codes

BT Business Trust
CM Multinational Corporation
CO Corporation
DM Domestic
FD Federal
FN Foreign
GP General Partnership
JV Joint Venture Partnership
LL Limited Liability Partnership
LO Local
PC Professional Corporation
PL Professional Limited Liability Partnership
ST State

Exchange

For entities that are publicly traded, the exchange where the entity trades must be indicated.

Sales Markets State/Country

All non-individual clients, both foreign and domestic, are required to record the specific market(s) in which they conduct business. For entities conducting business across the U.S., users are required to provide one U.S. state and may provide up to three U.S. states. For entities conducting international business, users are required to provide one country and may provide up to three countries. Certain entities may conduct business in both U.S. and international markets. In this instance, entities will be able to provide up to three U.S. states and three international countries.

- Local
- Regional
- U.S.
- International
- U.S./International

NAIC (North American Industry Classification System)

This is required for non-individual clients. NAICS codes are a standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.

WEALTH PLANNING SERVICES & PRICING SCHEDULE

At **Westlake Private Wealth Management**, we are committed to providing you with informed perspectives and tailored approaches to your needs and challenges. As your trusted advisor, we begin with a deep understanding of your financial priorities and then apply appropriate financial solutions to help optimize your wealth. Together, we can explore your needs regarding wealth planning as we work to help you build, manage, preserve and transfer your wealth.



YOUR INVESTMENT PLAN

- Assess your risk tolerance
- Rebalance or reposition assets as needed



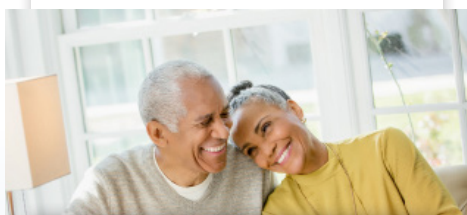
RETIREMENT ASSETS AND COMPANY BENEFITS

- Retirement plan investments
- Stock option grants or restricted stock



PERSONAL RISK/FAMILY SECURITY GENERATION

- Adequate insurance protection
- Management plan for incapacity/disability



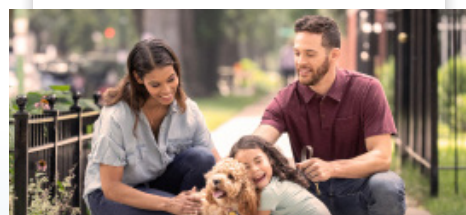
ACCESS TO BANKING AND LENDING SERVICES THROUGH WELLS FARGO AFFILIATES

- Securities-based lines of credit
- Small-business financing
- Credit cards



CASH FLOW/CASH RESERVE

- Emergency funds
- Cash alternatives



EDUCATION PLANNING

- Invest for children or grandchildren
- Identify suitable tax-advantaged investments



CHARITABLE AND COMMUNITY GIVING

- Select suitable charitable techniques
- Instill philanthropic values in the next generation



BUSINESS SUCCESSION PLANNING

- Understand personal and business objectives
- Implement appropriate risk protection tactics



INCOME TAX PLANNING

- Identify tax-efficient portfolio strategies
- Manage capital gains, losses and alternative minimum tax (AMT) exposure

It's not the wind. It's the set of the sails.

INVESTMENT SOLUTIONS

Tier 1: Separately Managed Accounts

Assets Under Management: \$1 million +

Separately Managed Accounts provide our clients with access to institutional money managers and the flexibility to customize their portfolios to personal needs and investment objectives. This solution provides access to investments with the option to own a single portfolio or combine multiple portfolios into one comprehensive, customized account backed by research from our global managers.

Tier 2: Private Investment Management

Assets Under Management: \$300k - \$1 million

Your investment account through the PIM program is structured to let our team make investment decisions on your behalf based on your risk tolerance and financial objectives. When selecting the securities for your portfolio, we conduct a detailed analysis of companies, industries, and overall economic conditions. In managing the account, we take a fiduciary role in constructing a suitable asset allocation strategy based on your personal investment style.

Tier 3: Compass Asset Allocation Strategy

Assets Under Management: \$175k - \$300k

Compass Asset Allocation strategies provide a full range of investable portfolio solutions which combine asset allocation guidance and product research with best practices in risk management. The portfolios range from mid-range solutions to ultra-high-net-worth solutions combining ETFs, mutual funds, alternative investment strategies, customized services and individual stock positions.

Tier 4: Allocation Advisors

Assets Under Management: \$175k and under

Allocation Advisors portfolios combine actively managed mutual funds and passively managed exchange traded funds (ETFs) to blend these management approaches within a single portfolio. The combination of active and passive approaches seeks to offer enhanced portfolio diversification at lower costs.

CLIENT'S PRICING GUIDE PRIVATE INVESTMENT MANAGEMENT (PIM) ASSET LEVEL

\$20 Million +	.50%
\$10 Million- \$19.9 Million	.60%
\$5 Million- \$9.9 Million	.70%
\$2.5 Million- \$4.9 Million	.80%
\$1 Million- \$2.49 Million	1.00%
\$500,000- \$1 Million	1.25%
\$250,000- \$500,000	1.50%

Fees for the PIM program include Advisory services, performance measurement, transaction costs, custody services and trading. Fees are based on the assets in the account and are assessed quarterly. There is a minimum fee of \$250 per calendar quarter to maintain this type of account. The fees do not cover the fees and expenses of any underlying packaged product used in your portfolio. Advisory accounts may not be suitable for all investors. During periods of lower trading activity, your costs might be lower if our compensation was based on commissions. Please carefully review the Wells Fargo Advisors advisory disclosure document for a full description of our services, including fees and expenses. The minimum account size for this program is \$50,000.



Wells Fargo Advisors Financial Network does not provide legal or tax advice.

Lending and other banking services available through Wells Fargo Advisors (NMLS UI 2234) are offered by banking and non-banking subsidiaries of Wells Fargo & Company, including, but not limited to Wells Fargo Bank, N.A. (NMLS ID 399801), Member FDIC, and Wells Fargo Home Mortgage, a division of Wells Fargo Bank, N.A. Certain restrictions apply. Programs, rates, terms, and conditions are subject to change without advance notice. Products are not available in all states. Wells Fargo Advisors is licensed by the Department of Business Oversight under the California Residential Mortgage Lending Act and the Arizona Department of Financial Institutions (NMLS ID 0906158). Wells Fargo Clearing Services, LLC, holds a residential mortgage broker license in Georgia and is licensed as a residential mortgage broker (license number MB2234) in Massachusetts. Financial Advisor NMLS ID, if applicable:

Wells Fargo Bank, N.A. ("the Bank") offers various banking, advisory, fiduciary and custody products and services, including discretionary portfolio management. Wells Fargo affiliates, including Financial Advisors of Wells Fargo Advisors, may be paid an ongoing or one-time referral fee in relation to clients referred to the Bank. In these instances, the Bank is responsible for the day-to-day management of any referred accounts.

Subject to credit approval. Credit Cards issued by Wells Fargo Bank, N.A., an Equal Credit Opportunity Lender. A Business Visa credit card is available for Business Accounts. Contact your Financial Advisor for details.

Insurance products are offered through nonbank insurance agency affiliates of Wells Fargo & Company and are underwritten by unaffiliated insurance companies.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. Westlake Private Wealth Management is a separate entity from WFAFN.

It's not the *wind*. It's the set of the *sails*.

ABOUT OUR PRACTICE

Westlake Private Wealth Management is a boutique wealth advisory practice whose principal members deliver integrated wealth management solutions to select high net worth individuals, multi-generational families, entrepreneurs and small businesses.

Our sole purpose is to build intimate and meaningful lifetime relationships and bring financial confidence to our clients throughout their evolving lives.

WE PURSUE THIS PURPOSE BY STEADFASTLY FOLLOWING THREE CORE PRINCIPLES:

- To provide our clients with the clearest paths to wealth accumulation, preservation and ultimate legacy by designing and implementing thoughtful, dynamic and disciplined investment strategies tailored to their unique goals
- As an independent practice, to deliver clear and objective advice, free from corporate mandates and conflicts of interest.
- To offer thoughtful counsel on all our clients' wealth management issues, and to help organize and simplify our clients' lives by uncovering financial blind spots, enabling them to enjoy their wealth now, and into future generations.



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Westlake Private Wealth Management and Wells Fargo Advisors Financial Network do not provide tax or legal advice. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. Westlake Private Wealth Management is a separate entity from WFAFN.

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79 of 206

OUR PHILOSOPHY AND OUR PROCESS

We believe that wealth management is about much more than just managing money; we believe it requires a panoramic and dynamic approach that evolves over time as our clients' lives inevitably unfold. That is why we have developed and refined a process that uncovers all areas of planning, dynamically evolves, and helps our clients put into place all the pieces of the financial puzzle, allowing them to look to the future with positive anticipation. Our process has seven distinct, yet integrated components:



ASSET MANAGEMENT

Using a disciplined and dynamic process, we manage taxable and tax-exempt wealth.



RISK MANAGEMENT

Helping to ensure that unforeseen blind spots are brought into full view and the preservation of wealth is maintained.



TAX

Tax sensitivity is at the center of every portfolio we manage, yet beyond that, we closely integrate with our clients' tax advisors on everything we do.



ESTATE

We are not estate planning attorneys, yet family legacy, continuity and succession planning are critical to our process.



CASH & DEBT MANAGEMENT

Through our affiliation with Wells Fargo Advisors Financial Network, Westlake Private Wealth Management offers access to a team of professionals with various products and services offered through Wells Fargo Bank



PHILANTHROPY

Planning our clients' giving strategies and their promotion of welfare in others.



VALUE-ADDED

Honoring the value of personal human touch, especially as technology creeps more into our lives.



WESTLAKE
PRIVATE WEALTH MANAGEMENT





STEPHEN MELI, CRPC® Managing Partner



CONTACT

818.436.6801

stephen.meli@westlakepwm.com

After completing business school, I began a career journey that first led me to Morgan Stanley as a Financial Advisor. My entry into this role was marked by a profound twist of fate, as I had just graduated on September 7th, 2001 in New York City. Little did I know that the World Trade Center, where I had received my training, would soon become the epicenter of the tragic events of September 11th. The confluence of this life-altering experience, coupled with the volatile financial landscape resulting from the dot-com bubble burst, Enron's corporate malfeasance, the 2002 market crash, the sub-prime housing bubble

and subsequent crisis, and the far-reaching 2007 global financial recession, all etched their impact on my character and molded my commitment to stewarding my clients' wealth with utmost responsibility.

Following my tenure at Morgan Stanley, I began a new chapter with Banc of America Investments, later becoming Bank of America / Merrill Lynch. Over eight transformative years, I advanced to the position of Senior Vice President/Resident Director and undertook the management of the Westlake Village branch. At the same time, I also earned the designations of Chartered Retirement Planning Counselor (CRPC®) and Portfolio Manager, solidifying my expertise.

In 2012, a pivotal moment unfolded when my co-founder and I collectively aspired for a more independent and liberated environment that would allow us to provide our clients with a more holistic approach to helping them realize their aspirations. This vision culminated in the establishment of Westlake Private Wealth Management, where our dedication to fostering genuine relationships and facilitating comprehensive strategies takes precedence.

Today, I work with a diverse and discerning clientele: from affluent families and individuals of the entertainment industry to corporate leaders and people within the LGBTQIA+ community. Through personalized consultations, I collaborate with each client to help identify tangible objectives, then design and execute tailor-made investment plans utilizing a blend of financial instruments, from traditional stocks, bonds, and mutual funds to innovative ETFs and socially conscious investments.

I am proud to be recognized as a Forbes Best-in-State Wealth Advisor in 2025. I believe this recognition highlights my commitment to delivering exceptional investment guidance, personalized service, and strategic planning to my clients.

I live in Rancho Dos Vientos, CA, where I share my life with my beautiful wife, Lisa, with whom I've shared 27 remarkable years, and our three children—Camryn, Ethan, and Owen. I am a fervent sports enthusiast, whether on the high school baseball fields cheering on my son, or at the many LA sports venues rooting for the Dodgers, Lakers and Chargers. I am an avid cinema aficionado, ever improving skier and golfer, all while pursuing my passion for global travel and embracing new horizons.

2025 Forbes Best-in-State Wealth Advisors; Awarded April 2025. Data compiled by SHOOK Research LLC based on the time period from 6/30/23 - 6/30/24 (Source: Forbes.com). The Forbes Best-in-State Wealth Advisors rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. Fee paid for use of marketing materials.



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It's not the *wind*. It's the set of the *sails*.

KEYS TO A SUCCESSFUL RELATIONSHIP

We provide comprehensive investment planning. If we develop a successful working relationship, we will work together to help achieve your goals.

WHAT YOU CAN EXPECT FROM US

You can trust that we will responsibly perform all requested services.

We will:

- Treat you with respect, honesty and dignity
- Act as your advisor, putting your interests first
- Strive to acquire a complete and accurate understanding of your goals, your tolerance for investment risk and your time frame
- Explain the implications of the strategies we propose
- Update you by email, mail and phone
- Be prompt and prepared for our meetings
- Meet with you to review your investment planning needs
- Respect your confidential information

WHAT WE CAN EXPECT FROM YOU

Effective communication and mutual respect are essential to a successful relationship, so we expect:

- Trust
- Honesty and full disclosure
- Respect
- Responsiveness to requests
- Sincerity
- Commitment to our process

We expect you to understand that our recommendations are always based on your best interests. As our client, you need to know that all investment advice will be based on the information you provide to us. We expect you to be fully engaged in the investment planning process.

MUTUAL RESPONSIBILITIES

We believe working together is essential to effective investment planning. To this end, we both need to make your investment strategies a priority. We will agree to:

- Keep each other informed of any new developments that might affect these strategies.
- Meet to review your investment plan and be prompt and prepared for those meetings

Together, we can build an effective, long-term working relationship.



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Coversheet

SY 26-27 Employee Handbook (Draft)

Section: VIII. Business and Operations
Item: B. SY 26-27 Employee Handbook (Draft)
Purpose: Vote
Submitted by:
Related Material: 2026-2027_Employee_Handbook_draft_2026.docx

BRIDGES CHARTER SCHOOL
EMPLOYEE HANDBOOK

2026-2027

TABLE OF CONTENTS

SECTION 1	WELCOME	9
	WELCOME TO Bridges Charter School!	9
SECTION 2	GENERAL	10
SECTION 3	OUR MISSION/VISION/PHILOSOPHY	11
	MISSION STATEMENT	11
	VISION STATEMENT	11
	GENERAL EXPECTATION OF STAFF	11
SECTION 4	EMPLOYMENT	12
	EMPLOYMENT APPLICATIONS	12
	AT WILL EMPLOYMENT	12
	EQUAL EMPLOYMENT OPPORTUNITY	12
	HARASSMENT	13
	What is Harassment?	13
	What is Retaliation?	14
	Responsibility	15
	Reporting	15
	Investigation/Complaint Procedure	15
	Conclusion	16
	Training Requirements	16
	WHISTLEBLOWER POLICY	16
	OPEN COMMUNICATION POLICY	17
	LACTATION ACCOMMODATION POLICY	17

Bridges Charter School Employee Handbook
 Approved 8/11/2025 Revised

PUBLIC RELATIONS	18
SECTION 5 – THE EMPLOYMENT PROCESS	19
EMPLOYEE CLASSIFICATIONS	19
WORK SCHEDULES	19
Full Time Exempt and/or Non-Instructional Employees:	20
Full Time Certificated Instructional Employees:	20
Non-Instructional and/or Classified Employees:	20
SCHOOL HOLIDAYS	20
ACADEMIC FREEDOM	21
ATTENDANCE AND PUNCTUALITY	22
TIME RECORDS (NON-EXEMPT EMPLOYEES)	22
OFF THE CLOCK WORK	23
MEAL AND REST PERIODS (NON-EXEMPT EMPLOYEES)	23
Meal Periods	23
Rest Periods	24
PAYDAYS	24
PAYROLL WITHHOLDINGS	24
SECTION 6 – CONDITIONS OF EMPLOYMENT	25
IMMIGRATION LAW COMPLIANCE	25
STAFF ACKNOWLEDGEMENT of IMMIGRATION ENFORCEMENT NOTICE & PROCEDURES	25
CREDENTIAL REQUIREMENTS	25
MANDATED TRAINING	25
TUBERCULOSIS TEST	25
CRIMINAL BACKGROUND CHECK	26

CHILD ABUSE AND NEGLECT REPORTING ACT	26
PERSONNEL FILES	27
CHANGES IN EMPLOYMENT	27
SECTION 7 – PERFORMANCE	27
EMPLOYEE PERFORMANCE REVIEW	27
Basis for Determining Pay	28
SECTION 8 – LEAVES	28
Family Care and Medical Leave	28
Pregnancy Disability Leave	33
Pay during Pregnancy Disability Leave	34
HEALTH BENEFITS DURING DISABILITY LEAVE	35
WORKERS’ COMPENSATION LEAVE	35
BEREAVEMENT LEAVE	35
JURY DUTY LEAVE	35
TIME OFF TO VOTE	36
SCHOOL APPEARANCE/SUSPENSION LEAVE	36
CRIME VICTIM LEAVE	36
DOMESTIC VIOLENCE LEAVE/SEXUAL ASSAULT LEAVE	37
For more information, contact the Labor Commissioner’s Office by phone at 213897-6595 or visit a local office by finding the nearest one on the website: www.dir.ca.gov/dlse/DistrictOffices.htm . The Labor Commissioner’s Office provides an interpreter at no cost to the employee, if needed.	38
SECTION 9 – BENEFITS	38
SICK LEAVE	38
Sick Leave Policy for Classified and/or hourly Employees	38
Sick Leave Policy – Certificated and Administrative Staff	39

Coordination of Sick Leave Benefits with Other Benefits	40
Personal Necessity Leave	40
VACATION	42
Standard Vacation Policy	42
HEALTH AND WELFARE BENEFITS	42
COBRA BENEFITS	43
Bridges Charter School withholds income tax from all employees’ earnings and, if elected, participates in FICA (Social Security) for temporary employees and Medicare withholding and matching programs as required by law.	43
WORKER’S COMPENSATION INSURANCE	43
CHILDCARE	43
SECTION 10 – EMPLOYEE COMMUNICATIONS	44
COMMUNICATIONS POLICY	44
No Expectation of Privacy	44
Professional Use of Communication Systems Required	45
Offensive and Inappropriate Material	45
Solicitations	45
Confidential Information	45
Copyrights and Trademarks	45
Maintenance and Security of the System	46
Violations of this Policy	46
Amendment and Modification of this Policy	46
Acknowledgement	46
SOCIAL MEDIA POLICY	46
EQUIPMENT POLICY	48

Laptop Computers	48
CELL PHONE POLICY	49
TELEPHONE CALLS AND TEXTING	49
NO SOLICITATION/DISTRIBUTION POLICY	50
Employee Responsibility	50
NEPOTISM POLICY	51
BUILDING SECURITY/SCHOOL KEYS	51
INTERNAL INVESTIGATIONS & SEARCHES	51
VIOLENCE IN THE WORKPLACE	52
SECTION 11 – STANDARDS OF CONDUCT	53
BRIDGES CHARTER SCHOOL Progressive Discipline Policy	53
PERSONAL APPEARANCE/STANDARDS OF DRESS	54
DISCIPLINARY PHYSICAL CONTACT WITH STUDENTS	54
STAFF-STUDENT INTERACTIONS	55
Boundaries Defined	55
Acceptable and Unacceptable Behaviors	55
Unacceptable Behaviors	55
Acceptable Behaviors	57
Boundaries Reporting	58
Boundaries Reporting	58
Investigating	58
Consequences	59
CUSTOMER & PUBLIC RELATIONS	59
PROHIBITED CONDUCT	59

CONFIDENTIAL INFORMATION	60
CONFLICTS OF INTEREST	61
Outside Employment	61
EXPENSE REIMBURSEMENT POLICY	62
General guidelines	62
Travel guidelines	62
SECTION 12 – SAFETY	63
SUBSTANCE AND ALCOHOL POLICY	63
SMOKING	65
SECURITY	65
PARKED VEHICLES	65
USE OF PERSONAL VEHICLE FOR SCHOOL BUSINESS	65
PERSONAL PROPERTY	65
SAFETY POLICY	65
ERGONOMICS	66
CHEMICAL EXPOSURE WARNING	66
SECTION 13 – TERMINATION	66
VOLUNTARY TERMINATION	66
INVOLUNTARY TERMINATION	66
EXIT INTERVIEWS	67
VERIFICATION AND REFERENCE POLICY	67
APPENDIX A--HARASSMENT COMPLAINT FORM	71
APPENDIX B--COMPLAINT FORM	73
APPENDIX C - Workplace Violence Prevention Plan	74

DEFINITIONS	74
RESPONSIBILITY	74
EMPLOYEE RESPONSIBILITIES	75
ADMINISTRATION/SUPERVISOR RESPONSIBILITIES	76
EMPLOYEE ACTIVE INVOLVEMENT	73
EMPLOYEE COMPLIANCE	74
COMMUNICATION WITH EMPLOYEES	77
EMERGENCY RESPONSE PROCEDURES	79
WORKPLACE VIOLENCE HAZARD IDENTIFICATION AND EVALUATION	79
PERIODIC INSPECTIONS	79
WORKPLACE VIOLENCE WARNING SIGNS	81
STRATEGIES TO DE-ESCALATE THREATENING BEHAVIOR	82
INCIDENT MANAGEMENT	82
MANAGING THE AFTERMATH OF AN INCIDENT	83
EMERGENCIES	83
EMPLOYEE HANDBOOK ACKNOWLEDGEMENT	84
CALIFORNIA WORKPLACE “KNOW YOUR RIGHTS” NOTICE”	85

SECTION 1 WELCOME

WELCOME TO Bridges Charter School!

We are happy to have you join us at Bridges Charter School. We believe our school is truly unique. We serve a diverse group of talented and hardworking students. We regard the work we do as being of utmost importance. Therefore, we have very high expectations for professionalism and performance for each one of our employees. All employees should treat all individuals, including students, teachers, administrators, volunteers, and family members, with respect, and approach all situations as opportunities to learn.

This handbook has been written to provide you with an overview of Bridges Charter School, its personnel policies and procedures, and your benefits as a Bridges Charter School employee.

This handbook is intended to explain in general terms those policies that most often apply to your day-to-day work activities. This handbook cannot anticipate every situation or answer every question about employment, and it is not an employment contract. Employees are expected to read this handbook thoroughly upon receipt, to know and abide by the policies outlined herein, and as revised over time, throughout their employment. No Bridges Charter School guideline, practice, manual or rule may alter the “at-will” status of your relationship with Bridges Charter School.

In order to retain necessary flexibility in the administration of its policies, procedures and benefits, Bridges Charter School reserves the right to change, deviate from, eliminate, or revise the handbook, except for the at-will provisions, at any time, without notice, whenever Bridges Charter School determines that such action is warranted. For these reasons, we urge you to check with the Administrative Coordinator to obtain current information regarding the status of any particular policy, procedure or practice. This handbook supersedes and replaces all previous personnel policies, practices and procedures.

We welcome you and wish you great success and fulfillment at Bridges Charter School.

Sincerely,

—

Kelly Simon, Executive Director & Cindy McCarthy Director of Daily Operation

SECTION 2 GENERAL

This handbook has been written to serve as a guide for the employer/employee relationship. This handbook applies to faculty and staff at Bridges Charter School. The standards of conduct apply to all individuals who work on the school premises including independent contractors, vendors, and visitors. Unless otherwise indicated, a benefit, policy, program, or procedure applies, or is available, to ALL eligible employees.

This handbook contains only general information and guidelines. It is not intended to be comprehensive or to address all the possible applications of, or exceptions to, the general policies and procedures described. For that reason, if you have any questions concerning eligibility for a particular benefit, or the applicability of a policy or practice to you, you should address your specific questions to your supervisor or the Administrative Coordinator. You are responsible for reading, understanding, and complying with the provisions of this Handbook. Our objective is to provide you with a work environment that is constructive to both personal and professional growth.

Neither this handbook nor any other Bridges Charter School document confers any contractual right, either express or implied, to remain in Bridges Charter School's employ, nor does it guarantee any fixed term or condition of your employment. Except as otherwise provided in an executed employment agreement, your employment is not for any specified period of time and may be terminated at will, with or without cause and without prior notice, by Bridges Charter School or you may resign for any reason at any time.

No supervisor or other representative of Bridges Charter School except the Directors, with the approval of the Board of Directors, has the authority to enter into any agreement for employment for any specified period of time, or to make any agreement contrary to the above. Second, the procedures, practices, policies and benefits described herein may be modified or discontinued from time to time with or without advance notice. We will try to inform you of any changes as they occur.

Finally, this handbook contains proprietary information that should not be disclosed outside Bridges Charter School, other than to individuals affiliated with Bridges Charter School whose knowledge of the information is required in the normal course of business.

SECTION 3 OUR MISSION/VISION/PHILOSOPHY

MISSION STATEMENT

Our mission is to educate the Whole Child using a combination of innovative curriculum and instruction along with social/emotional education embedded in the program. Students will be enabled to reach their innate intellectual, creative, and leadership potential through our commitment to nourish curiosity, compassion, independence, resourcefulness, and a respect for diversity.

VISION STATEMENT

Our vision is to create a K-8 learning community in which all teachers, parents and students partner to support the cognitive, emotional and social success of our students; where there exists positive, respectful and peaceful collaboration; and where children are enabled and empowered to become lifelong learners and compassionate global citizens.

GENERAL EXPECTATION OF STAFF

Staff members are responsible for performing their essential job duties while working regularly with children and families. These responsibilities may include communication, supervision, support, and responding to the needs of children and family members. Due to the nature of this work, staff may occasionally encounter stressful or emotionally challenging situations, including managing difficult behaviors, addressing family concerns, or responding to urgent needs. Staff are expected to maintain professionalism, follow established policies and procedures, and utilize appropriate support resources when handling these situations as part of their essential job responsibilities.

SECTION 4 EMPLOYMENT

EMPLOYMENT APPLICATIONS

We rely upon the accuracy of information contained in the employment application and the accuracy of other data presented throughout the hiring process and employment. Any misrepresentations, falsifications, or material omissions in any of this information or data may result in exclusion of the individual from further consideration for employment or, if the person has been hired, termination of employment.

AT WILL EMPLOYMENT

We believe that an employment relationship is successful as long as both parties are mutually satisfied. Accordingly, both you and Bridges Charter School will have the right to terminate your employment and all related compensation and benefits at any time, with or without cause and with or without notice. In addition, Bridges Charter School may eliminate or change any term or condition of your employment (including but not limited to your job assignment, duties, or salary) at will, at any time, for any reason not prohibited by law, with or without cause and with or without previous notice.

This is called “employment at will,” and no one other than the Director of Bridges Charter School, with the approval of the Board of Directors, has the authority to alter your employment at-will status, to enter into an agreement for employment for a specified period of time, or to make any agreement contrary to this policy. Further, any such agreement must be signed by the Director. Statements of specific grounds for termination set forth in this Handbook, or elsewhere, are not all-inclusive and are not intended to restrict Bridges Charter School's right to terminate at-will.

EQUAL EMPLOYMENT OPPORTUNITY

Bridges Charter School is an equal opportunity employer. In accordance with applicable law, the School prohibits discrimination against any employee or applicant for employment on the basis of an individual’s protected status, including race/ethnicity, color, religious creed (which includes, without limitation to religious dress and grooming practices), gender, gender identity, gender expression, national origin (which includes, but is not limited to, national origin groups and aspects of national origin, such as height, weight, accent, or language proficiency), ancestry, physical disability, mental disability, medical condition, age, sexual orientation, marital status, sex (which includes pregnancy, childbirth, breastfeeding, and related medical conditions), military or veteran status (including state and federal active and reserve members as well as those ordered to duty or training), immigration/citizenship status or related protected activities (which includes undocumented individuals and human trafficking), genetic information, protected medical leaves, domestic violence victim status, political affiliation, or any other consideration protected by applicable law. Also, in accordance with applicable law, the school prohibits discrimination against any qualified employee or applicant with a physical or mental disability.

These categories include a perception that the individual has any of these characteristics or is associated with a person who has (or is perceived to have) any of these characteristics. The school will ensure that applicants and employees are treated in all aspects of employment without unlawful discrimination because of these or any other protected basis. Such aspects of employment include, but are not limited to, recruitment, hiring, promotion, demotion, transfer, layoff, termination, compensation, and training.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, the school will make a good faith effort to provide reasonable accommodation for the known physical or mental limitations of an otherwise qualified applicant or employee with a disability, unless undue hardship would result to the school. An applicant or employee who believes he or she requires accommodation in order to perform the essential functions of the job should contact the Administrative Coordinator and request such accommodation, specifying what accommodation he or she needs to perform the job. The school will analyze the situation, engage in an interactive process with the individual, and respond to the individual's request.

If you believe you have been subjected to discrimination, please follow the complaint procedure outlined below.

HARASSMENT

It is the policy of Bridges Charter School to ensure equal employment opportunity without discrimination or harassment on the basis of race, religious creed (which includes, without limitation, to religious dress and grooming practices), color, national origin (which includes, but is not limited to, national origin groups and aspects of national origin, such as height, weight, accent, or language proficiency), ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex (which includes pregnancy, childbirth, breastfeeding, and related medical conditions), gender, gender identity, gender expression, age, sexual orientation, military or veteran status (including state and federal active and reserve members as well as those ordered to duty or training), immigration/citizenship status or related protected activities (which includes undocumented individuals and human trafficking), protected medical leaves, domestic violence victim status, political affiliation, or any other consideration made unlawful by federal, state, or local laws, ordinances, or regulations. These categories include a perception that the individual has any of these characteristics or is associated with a person who has (or is perceived to have) any of these characteristics.

Bridges Charter School prohibits any such discrimination or harassment in the workplace. In addition, we prohibit abusive conduct/workplace bullying in the work environment. It is our mission to provide a professional work and learning environment free of harassment, discrimination and/or workplace bullying that maintains equality, dignity, and respect for all. This policy protects all employees of the school as well as interns, volunteers, and potential employees (applicants). All employees of the school are required to abide by this policy, regardless of position or status, including supervisors, administration, and co-workers. In addition, this policy prohibits unlawful harassment by third parties, including students, parents, vendors or other third parties, who have workplace contact with our employees.

Conduct prohibited by these policies is unacceptable in the workplace and in any work-related setting outside the workplace, such as during business or field trips, meetings and business or school-related social events.

What is Harassment?

Harassment can take many forms. As used in this Employee Handbook, the terms "discrimination" and "harassment" includes all unwelcome conduct that comprises the following behavior pertaining to any of the above protected categories or characteristics:

Unlawful Harassment: Prohibited unlawful harassment may include, but is not necessarily limited to, the following behavior pertaining to any of the above protected categories:

- Verbal conduct such as flirting, epithets, derogatory jokes or comments, voicemails, slurs or unwanted sexual advances, sexually suggestive innuendos, conversations regarding sexual activities, invitations, or comments

Bridges Charter School Employee Handbook
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(including, but not limited to, threats of deportation against applicants and employees and family members of applicants and employees, derogatory comments about immigration status or disability, or mockery of an accent or a language or its speakers) (“hostile work environment” harassment).

- Disrespectful or unprofessional conduct based on any of the protected categories listed above (“hostile work environment” harassment).
- Comments or conduct that consistently target one gender, even if the content is not sexual (“hostile work environment” harassment).
- Visual conduct such as derogatory and/or sexually oriented posters, photography, cartoons, drawings, gestures, text messages, social media, instant messages, e-mails, letters, pictures, or gifts (“hostile work environment” harassment). ○ Physical conduct such as assault, unwanted touching, blocking normal movement, or interfering with work because of any protected basis (“hostile work environment” harassment).
- Threats and demands to submit to sexual requests as a condition of continued employment or to avoid some other loss and offers of employment benefits in return for sexual favors (quid pro quo” harassment). ○ Sexually harassing conduct does need not to be motivated by sexual desire and may include situations that began as reciprocal relationships but later ceased to be reciprocal.

What is abusive conduct/workplace bullying?

- Conduct of an employee in the workplace that a reasonable person would find hostile, threatening, intimidating, humiliating and unrelated to an employer’s legitimate business interests.
- Use of derogatory remarks, insults and/or epithets
- Verbal or physical conduct that sabotages or undermines a person’s work performance that is threatening, humiliating or intimidating.
- Bullying, gossip, profanity, abusive conduct and negative comments are destructive to our School culture, create false rumors, disrupt school operations and interfere with the privacy of others.

What is Retaliation?

Retaliation against an individual for reporting harassment, discrimination, abusive conduct or for participating in an investigation of a claim of such is a serious violation of this policy and, like harassment or discrimination itself, will be subject to disciplinary action. Acts of retaliation should be reported immediately and will be promptly investigated and addressed.

As used in this policy, “retaliation” means taking any adverse employment action against an employee because the employee engaged in protected activity pursuant to this policy. Protected activity may include, but is not necessarily limited to, opposing a practice or conduct the employee reasonably believes to be unlawful, reporting or assisting in reporting suspected violations of this policy, cooperating or participating in investigations or proceedings arising out of a violation of this policy, or engaging in any other activity protected by applicable law.

As used in this policy, an “adverse employment action” means conduct or an action that materially affects the terms and conditions of the employee’s employment status or is reasonably likely to deter the employee from engaging in further

protected activity. An adverse employment action may include, but is not limited to, the following: demotion, suspension, reduction in pay, denial of merit salary increase, failure to hire, refusing to promote, denying employment opportunities, changing work assignments or otherwise treating an employee differently.

Any retaliatory adverse action because of a protected activity may be unlawful and will not be tolerated. If an employee believes he/she has been subjected to, has witnessed, or has knowledge of retaliation in violation of this policy, please follow the complaint procedure outlined below.

Responsibility

All Bridges Charter School employees have a responsibility for keeping our work environment free of harassment, discrimination, retaliation and abusive conduct in accordance with this policy.

Reporting

Bridges Charter School strongly encourages reporting of all perceived incidents of discrimination, harassment, abusive conduct or retaliation, regardless of the offender's identity or position. Individuals who believe that they have been subjected to such conduct should immediately discuss their concerns with their immediate supervisor, or Administration. All employees who witness potential violations of this policy, and particularly supervisors, are required to immediately report such incidents to the Administration. Supervisors must report any and all conduct of which they are made aware, which violates, or may violate, policies regarding discrimination, unlawful harassment, or retaliation to Administration, as appropriate. Supervisors who fail to report alleged violations may be subject to disciplinary action, up to and including termination. There is no requirement to report your complaint to any designated supervisor within Bridges

Charter School. Select the individual with whom you feel the most comfortable discussing your complaint. Do not report your complaint to any individual who has allegedly engaged in the inappropriate behavior that is the subject of your complaint.

Every effort will be made to keep such reports as confidential as possible, although confidentiality cannot be guaranteed. Bridges Charter School is serious about enforcing its policy against harassment; however, Bridges Charter School cannot resolve a harassment problem that it does not know about. Therefore, employees are responsible for bringing any such problems to Bridges Charter School's attention so it can take whatever steps are necessary to correct the problems.

All complaints submitted pursuant to this policy can be made in writing or verbally. Your complaint should be specific and should include the names of the individuals involved, the names of any witnesses, and any supporting documentation. Employees may choose to submit their complaints anonymously.

Investigation/Complaint Procedure

All complaints of harassment, discrimination, retaliation or abusive conduct will be promptly investigated.

Bridges Charter School encourages the prompt reporting of complaints or concerns so that rapid and appropriate remedial action can be taken before relationships become irreparably strained. Therefore, while no fixed reporting period has been established, early reporting and intervention have proven to be the most effective method of resolving actual or perceived incidents of harassment.

Bridges Charter School's investigation methods will vary depending on the nature of the complaint, the allegations, the witnesses, and other factors. The investigation may include individual interviews with the parties involved and, where necessary, with individuals who may have observed the alleged conduct or may have another relevant knowledge. Confidentiality will be maintained throughout the investigatory process to the extent of a consistent loop with adequate

Bridges Charter School Employee Handbook
Approved

investigation methods and appropriate corrective actions. The school has a compelling interest in protecting the integrity of its investigations. In every investigation, the school has a strong desire to protect witnesses from harassment, intimidation and retaliation, to keep evidence from being destroyed, to ensure that testimony is not fabricated, and to prevent a cover-up. If the School reasonably imposes a confidentiality requirement and you do not maintain such confidentiality, you may be subject to disciplinary action up to and including immediate termination.

All employees are required to fully cooperate with Bridges Charter School's investigation, which includes, but is not limited to, providing all pertinent information in a truthful manner, submitting pertinent documents in their possession, not interfering with the investigation in any manner, and maintaining an appropriate level of discretion regarding the investigation. Failure to do so may result in disciplinary action, up to and including termination.

During the investigation, Bridges Charter School will provide regular progress updates, as appropriately, to those directly involved. Bridges Charter School will strive to complete its investigation as efficiently as possible in light of the allegations and will reach any conclusions based on the evidence collected and credibility of the witnesses.

Bridges Charter School may investigate conduct in the absence of a formal complaint if the Bridges Charter School has reason to believe that an individual has engaged in conduct that violates Bridges Charter School policies or applicable law. Further, Bridges Charter School may continue its investigation even if the original complainant withdraws his or her complaint during the course of the investigation.

Any conduct which Bridges Charter School believes constitutes harassment, discrimination, abusive conduct, or retaliation in violation of this policy will be dealt with appropriately. Corrective action may include, for example, training, referral to counseling and/or disciplinary action such as warning, reprimand, withholding of a promotion or pay increase, reassignment, temporary suspension without pay or termination, as Bridges Charter School believes appropriate under the circumstances. Due to privacy protections, the Bridges Charter School may not be able to fully disclose its entire decision regarding corrective action to the complainant. False and malicious complaints of harassment, discrimination, abusive conduct, or retaliation as opposed to complaints, which, even if erroneous, are made in good faith, may be the subject of appropriate disciplinary action.

Conclusion

This policy was developed to ensure that all employees could work in an environment free from harassment, discrimination, abusive conduct and retaliation. Bridges Charter School will make every reasonable effort to ensure that all concerned are familiar with these policies and aware that any complaint in violation of such policies will be investigated and resolved appropriately. Any employee who has questions or concerns about these policies should talk with the Administrative Coordinator or Directors.

If you believe you have experienced discrimination, harassment, or abusive conduct, we encourage you to report and seek resolution at the site level. However, you may file a Department of Fair Employment and Housing ("DFEH") or Equal Employment Opportunity Commission complaint. For information contact the DFEH or EEOC. You may find their phone numbers in the phone directory.

Training Requirements

Bridges Charter School requires all employees to abide by California's training requirements, which includes training within six months of hire and retraining every two years thereafter. Employees who fail to complete this required training will be subject to disciplinary action, up to and including termination.

WHISTLEBLOWER POLICY

Bridges Charter School is committed to maintaining a workplace where employees are free to raise good faith concerns regarding certain business practices, specifically: (1) reporting suspected violations of law, including but not limited to federal laws and regulations; (2) providing truthful information in connection with an inquiry or investigation by a court, agency, law enforcement, or other governmental body; and (3) identifying potential violations of Bridges Charter School policy, specifically the policies contained in Bridges Charter School's Employee Handbook.

An employee who wishes to report a suspected violation of law or Bridges Charter School policy may do so confidentially by contacting the President of the Board of Directors.

Bridges Charter School expressly prohibits any form of retaliation, including harassment, intimidation, adverse employment actions, or any other form of retaliation, against employees who raise suspected violations of law, cooperate in inquiries or investigations, or identify potential violations of Bridges Charter School. Any employee who engages in retaliation will be subject to discipline, up to and including termination.

Any employee who believes that he or she has been subjected to any form of retaliation as a result of reporting a suspected violation of law or policy should immediately report the retaliation to one of the following: Administrative Coordinator or Directors. Any supervisor or coordinator that receives complaints of retaliation must immediately inform the Administrative Coordinator or Directors.

Reports of suspected violations of law or policy and reports of retaliation will be investigated promptly and, in a manner, intended to protect confidentiality to the extent possible, consistent with a full and fair investigation. Information will be disclosed only as it is necessary to complete the investigation and resolve the matter. The Board of Directors and/or a member of Bridges Charter School management will conduct the investigation or designate other internal or external parties to conduct the investigations. The investigating parties will notify the concerned individuals of their findings as appropriate.

OPEN COMMUNICATION POLICY

We want to hear from you. Bridges Charter School strongly encourages employee participation in decisions affecting their employment and their daily professional responsibilities. Our greatest strength lies in our employees and our ability to work together. We encourage open communication about all aspects of our school and organization. Employees are encouraged to openly discuss with their supervisors any problems or suggestions they believe would make our organization better and stronger. Bridges Charter School is interested in all our employees' success and fulfillment. We welcome all constructive suggestions and ideas.

Employees who have work-related concerns or complaints are encouraged to discuss them with the Administrative Coordinator or Directors. Employees are encouraged to raise their work-related concerns as soon as possible after the events that cause concern. Bridges Charter School will attempt to keep the employees' concerns and complaints and any resulting investigation confidential to the extent feasible. However, in the course of an investigation and/or in resolving the matter, some dissemination of information to others may be necessary, appropriate, and/or required by law. Employees with concerns or complaints relating to harassment, discrimination or retaliation should follow the reporting procedure outlined in this Handbook.

LACTATION ACCOMMODATION POLICY

Bridges Charter School provides a reasonable amount of break time to accommodate an employee's need to express breast milk for the employee's infant child.

A private location to express breast milk will be provided in close proximity to the employees' work area. The employee's normal work area may be used if it allows the employee to express milk in private. In certain circumstances, a temporary location, multipurpose room, or shared space may be provided in accordance with applicable law. The location will also meet the following requirements: not be a bathroom; be free from intrusion; be shielded from view; be safe, clean, and free of hazardous materials; contain a surface to place a breast pump and personal items; contain a place to sit; and have access to electricity or alternative devices, including, but not limited to, extension cords or charging stations, needed to operate an electric or battery powered breast pump. In addition, the school should provide access to a sink with running water and a refrigerator suitable for storing milk in close proximity to the employees' work area. If a refrigerator cannot be provided, the school may provide another cooling device suitable for storing milk, such as a School-provided cooler.

An employee who would like to request accommodation to express milk should complete an accommodation request form and contact the employee's supervisor or Administrative Coordinator. The school will respond accordingly, generally within two business days. The school reserves the right to deny an employee's request for a lactation break if the additional break time will seriously disrupt operations.

Employees requesting accommodation under this policy should comply with the following requirements:

1. The employee should complete an accommodation request form and contact their supervisor or Administrative Coordinator to request designation of a location and time to express breast milk under this policy.
2. The requested break time should, if possible, be taken concurrently with other scheduled break periods. Nonexempt employees should clock out for any lactation breaks that do not run concurrently with normally scheduled rest periods. Any such breaks will be unpaid.
3. Retaliation for making a lactation accommodation request is strictly forbidden. If the employee believes the employee has been retaliated against it should be reported immediately to Human Resources (Administrative Coordinator) or Directors. Discrimination against and harassment of lactating employees in any form is unacceptable that it will not be tolerated at Bridges Charter School and will be handled in accordance with Bridges Charter School's policy on discrimination and harassment.

If any employee believes that he or she has experienced retaliation or discrimination as a result of conduct protected by this policy, the employee may also file a complaint with his or her supervisor and/or the Labor Commissioner's Office. For more information, contact the Labor Commissioner's Office by phone or visit a local office by finding the nearest one on our website: www.dir.ca.gov/dlse/DistrictOffices.htm. The Labor Commissioner's Office provides an interpreter at no cost to the employee, if needed.

PUBLIC RELATIONS

The success of a charter school depends upon the quality of the relationship between the school, its employees, students, parents and the general public. The public impression of Bridges Charter School and its interest in our school will be formed in part by Bridges Charter School employees. Our employees are ambassadors. The more goodwill an employee promotes, the more employees, students, parents and the general public will respect and appreciate the employee, Bridges Charter School and our school's services.

Below are several things' employees can do to help leave people with a good impression of Bridges Charter School.

These are the building blocks for our continued success:

- Communicate with parents regularly
- Act competently and deal with others in a courteous and respectful manner
- Communicate pleasantly and respectfully with other employees at all times
- Follow up on requests and questions promptly, provide business-like replies to inquiries and requests, and perform all duties in an orderly manner
- Respond to email and voicemail within 24 hours during the workweek
- Take great pride in your work and enjoy doing your very best

SECTION 5 – THE EMPLOYMENT PROCESS

EMPLOYEE CLASSIFICATIONS

Each Bridges Charter School employee is either a “full-time,” “part-time,” or “temporary” employee and either an “exempt” or “non-exempt” employee. Some of the policies and benefits described in this handbook depend on whether the employee is full-time or part-time. Full-time employees are those employees regularly scheduled to work 40 hours each week. Part-time employees are those regularly scheduled to work less than 40 hours each week. Temporary employees are employed for short-term assignments or in connection with a specific project or event. Temporary employees are not eligible for employee benefits, except those mandated by applicable law.

Every member of the team is designated as a “Certificated employee” or “Classified employee.” Some of the policies and benefits described in this handbook depend on how the employee is designated.

Exempt employees: This category includes all regular employees who are determined by the school to be exempt from certain wage and hour provisions of state and federal laws. Exempt employees are paid a fixed salary that is intended to cover all of the compensation to which they are entitled related to their job description and duties thereof. Because they are exempt, such employees are not entitled to additional compensation for extra hours of work or time off in lieu of additional compensation.

Non-exempt employees: This category includes all regular employees who are covered by certain wage and hour provisions of state and federal laws. Non-exempt employees are entitled to overtime and double-time pay as well as meal and rest breaks, as prescribed by law.

Certificated Employee: Certificated Employees are those employees hired by Bridges Charter School that may require the employee to hold a valid California Teaching Certificate for a teaching position or other position that requires a Certification such as Administrator, Counselor, Speech Therapist, or School Psychologist and aligns with the Charter and state policies.

Classified Employee: Classified Employees includes those employees hired by Bridges Charter School that DOES NOT REQUIRE a Teaching Certification, such as positions in the Business Office such as Secretary, Food Service, Maintenance, Technology, Paraprofessionals, and Health Clerk.

WORK SCHEDULES

All employees will be assigned a work schedule suitable for their job assignment and will be expected to begin and end work according to the schedule. Please note that schedules may vary depending on a variety of factors including whether you work during the academic year or on an annual basis. The Executive Director or Director of Daily Operations will assign your individual work schedule. In order to accommodate the needs of our business, it may be necessary to change individual work schedules on either a short-term or long-term basis. All employees are expected to be at their desks or workstations at the start of their scheduled shift, ready to work. If you need to modify your schedule, request the change with the Administrative Coordinator or your supervisor. All schedule changes or modifications must be approved by the Executive Director or Director of Daily Operation.

Bridges Charter School reserves the right to assign employees to jobs other than their usual assignment, when necessary, provided the employee is capable of performing the essential functions of the alternate assignment. Non-exempt employees are not allowed to perform work at home or away from the school unless specifically authorized for each occurrence by their supervisor. Non-exempt employees are not to work before or to continue working after their scheduled hours unless specifically assigned by the supervisor. Non-exempt employees are not allowed to work “off the clock.” Attendance at school-sponsored functions is not compensated unless the supervisor has required you to attend and work at the function and has written approval from Administration to provide additional compensation. Employees violating these rules may be subject to disciplinary action up to and including termination.

Full Time Exempt and/or Non-Instructional Employees:

Work schedule and hours are subject to each individual employee’s job description and may not align with the regular instructional school day or hours.

Full Time Certificated Instructional Employees:

Typical work hours for instructional employees are from 7:45 a.m. to 3:45 p.m. At the discretion of administration these hours may be adjusted by individual contracts. Although not a legal mandate, the school will do its best to support a ten (10) minute rest break as well as a thirty (30) minute meal break. Instructional Employees may be required to work other than the normal hours and to take their lunch breaks and/or rest breaks on a rotating basis so that classes and student activities are always covered. It is expected that teachers (certificated staff) will participate in activities outside of regular business hours

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such as instructional prep, back to school night, information sessions, evening and Saturday family workshops or special meetings.

The administration must approve any exceptions to the regular work schedule or work day to include arriving late or leaving early for instructional employees.

Exempt employees will be expected to work the number of hours necessary to complete their assigned responsibilities.

Non-Instructional and/or Classified Employees:

Administration will determine the normal working hours for non-instructional and/or employees. Nonexempt, non-instructional and/or employees are entitled a 10-minute rest break for every 4 hours worked and a thirty (30) minute unpaid meal break when working 5 or more hours in a day and are entitled to overtime and double-time pay as required by law. Non-instructional and or classified employees work per their assigned work calendar.

SCHOOL HOLIDAYS

The school observes the following paid holidays during the year:

- New Year's Day
- Martin Luther King Day
- Lincoln's Birthday (local holiday) Paid for "essential" designated classified office staff only
- Washington's Birthday
- Good Friday (local holiday) Paid for "essential" designated classified office staff only
- Juneteenth
- Memorial Day
- Labor Day
- Local Holiday Yom Kippur (local holiday) Paid for "essential" designated classified office staff only
- Veteran's Day
- Thanksgiving Day
- Day after Thanksgiving (local holiday) Paid for "essential" designated classified office staff only
- Christmas Day

*****Essential designated office staff shall be defined by administration as critical to the operation of the school opening and closing and work more than 200 days per year.**

To be eligible for holiday pay, an employee must be an hourly **classified** employee. Employees will receive time off with pay at their normal base rate and based on their regular work schedule if they are scheduled to work on any of the Bridges observed **federal** holidays. **Only essential designated office staff will receive holiday pay for "local" holidays.** (The number of hours assigned for a holiday will be based on their typical hours worked on that particular day or an average of hours worked in a typical week on their assigned schedule). ~~Classified specialists must be full-time to receive holiday pay.~~ Bridges will designate either Friday or the Monday adjacent to the weekend as a paid day off. However, the School may close on another day. Holiday observance will be announced in advance. The school reserves the right to change this policy at any time, with or without notice.

Holiday hours do not count as hours worked for purposes of calculating overtime. For example, if you receive 8 hours of holiday pay on Monday and work 40 hours Tuesday-Saturday (8 hours/day), you will not be eligible for overtime.

Recognized religious holidays may be taken off by an employee whose religion requires observance of the particular day. Employees must request the day off in advance by written notice to Administration. The employee may use paid vacation (or PTO) if the employee has unused paid time off available, otherwise the holiday will be unpaid. All steps will be taken to reasonably accommodate a religious holiday (or practice) absent from an undue hardship.

ACADEMIC FREEDOM

Academic freedom is not absolute. It must be exercised within the basic ethical responsibilities of the teaching profession. Those responsibilities include:

- An understanding of our academic traditions and methods.
- A concern for the welfare, growth, maturity and development of children;
- The use of accepted scholastic methods; and
- Application of good taste and judgment in selecting and employing materials and methods of instruction.

ATTENDANCE AND PUNCTUALITY

The presence or absence of each employee is of critical importance to the successful operation of the Bridges Charter School. Regular attendance and punctuality are considered an essential function of each position. Therefore, Bridges Charter School expects all of its employees to be on time, ready to begin work at the beginning of their day, and to work the full allotted time they are assigned each day. If an employee is unable to report for work on any particular day or any portion of their day, they must call or text the Administrative Coordinator and/or their supervisor and use the absence management system to record their absence, at a minimum the evening before or not later than 6:00 a.m. on the day scheduled to work. If an employee calls in less than one hour before the scheduled time to begin work, they will be considered tardy. (See chart below). Absent extenuating circumstances or a medical provider's order excusing you from work for a period of time, you must call in on any day you are scheduled to work and will not report to work. The school understands that in some cases; advance notice is not possible. In these cases, notify the Administrative Coordinator or Administration personally at the earliest possible moment. In some circumstances, you may be required to provide verification of or documentation for your absence.

In the case of a teacher's absence, it is expected that substitute plans will be left in the classroom with clear instructions or sent to the Administrative Coordinator in advance with all materials needed. All teachers are expected to have an emergency sub plan clearly labeled ready to go in their room should the need arise. Failure to have sub plans on a repeat basis will be documented on an employee's review.

More than three instances of tardiness by a nonexempt employee or instructional employee during any twelve-month period are considered excessive and will be documented on an employee's review. Any unexcused absence is considered excessive. A consistent presence, including punctual attendance, is a critical piece to the success of the school and will be taken into consideration for continued employment.

If you fail to report for work without any notification to the Administrative Coordinator and the absence continues for a period of three business days, the school will determine that you have abandoned your job and voluntarily terminated your employment.

CHART OF CONSEQUENCES FOR TARDINESS AND ABSENCES		
	OCCURRENCES/DAYS	STEP AND ACTION
TARDINESS	1 -3 tardiness	Verbal Warning
	The 4th tardy	Written Warning.
	The 5th tardy	Staff member will also be placed on an Improvement Plan.
	6th and subsequent tardiness	Disciplinary: The employee may be subject to further discipline or dismissal.
ABSENCES	After all sick leave/vacation days are used	For exempt employees, a full day of pay will be deducted for each full days' absence. For nonexempt employees, no deduction will be made, but the employee will not earn wages during their absence.
NO CALL/NO SHOW	3 consecutive days	Considered job abandonment, which can lead to termination.

TIME RECORDS (NON-EXEMPT EMPLOYEES)

Nonexempt employees must accurately complete time records within the school’s timekeeping system on a daily basis. Non-exempt employees are not allowed to work “off the clock.” All the time actually worked must be recorded. You cannot record time and/or submit a time record for another employee. Each employee must sign and submit his or her own time record.

If employees fail to submit daily time records on time or consistently have missed punches in the system, they may be subject to disciplinary action and may experience delays in receiving their pay.

Exempt employees must report full days of absence from work.

OFF THE CLOCK WORK

Bridges Charter School prohibits all non-exempt employees from working off the clock at any time. All time worked must be recorded on the employee’s timesheet and approved in advance by administration. This includes the use of laptops, computers, PDAs or cellphones to check work email, voicemail or to send text messages after hours.

MEAL AND REST PERIODS (NON-EXEMPT EMPLOYEES)

All non-exempt employees are provided with an opportunity to take meals and rest periods consistent with the law. During your meal periods and rest periods, you may not work at all. You are excused from all duties. In addition, please understand that you may not combine required meal or rest periods in order to take a longer break. Also, you may not miss a required meal or rest period in order to start work later or leave work earlier. In the rare event that you believe you cannot take a meal or rest period, or you are unable to take a full meal or rest period pursuant to school policy or you must begin your meal period more than five hours after your work period began, you must notify Human Resources in advance whenever possible (and, in

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any event, as soon as possible) so that the proper measures may be taken. If you leave the premises for either a meal or rest break, you are doing so for strictly personal reasons and will not be covered by the workers' compensation.

Failure to comply with the school's policy regarding meal and/or rest periods can lead to discipline, up to and including termination

Meal Periods

Nonexempt employees (hourly employees) scheduled to work more than five hours in a day are given a 30-minute duty-free unpaid meal period. The meal period must be taken before the end of the fifth (5th) hour of work. For example, if the employee begins working at 7:00 a.m., then the employee must clock out to begin his or her meal period no later than 12:00 p.m. (noon). The employee may waive this meal period if his/her workday is completed within a total of six hours or less. To waive a meal period, the employee must receive prior written approval from the Administrative Coordinator and complete a "Meal Period Waiver" form.

If an employee's day exceeds ten hours of work time, the employee is entitled to an additional 30-minute duty-free meal break. The employee only may waive this second meal period if he/she has taken the required first meal break of at least 30 minutes and his/her workday will not exceed 12 hours. To waive the second meal period, the employee must receive prior written approval from the Administrative Coordinator and complete a "Second Meal Period Waiver" form.

<u>Hours Worked</u>	<u>Number of Meal Periods</u>
0 hours to 5 hours	No meal period
Over 5 hours to 10 hours	1 30-minute meal period
Over 10 hours to 14 hours	2 30-minute meal periods

Nonexempt employees must observe assigned working hours, the time allowed for meal periods, and report any missed, late or short meal periods on that days' time record and to the employee's supervisor immediately. The meal period must be accurately recorded on the employee's timesheet. Meal periods are unpaid time, and employees are free to leave the premises. Meal periods may not be combined with rest periods or used to come in later or leave earlier on a workday.

Rest Periods

Nonexempt employees are authorized and permitted to take a 10-minute rest period for each four (4) hours of work or major portion thereof. Your supervisor may schedule your rest periods. Rest periods should be taken as close to the middle of a work period as possible and cannot be taken in conjunction with a meal period. Rest periods are paid work time; they cannot be waived by the employee in order to shorten the workday or use towards additional time off.

<u>Hours Worked</u>	<u>Number of Rest Periods</u>
3.5 hours to 6 hours	1 10-minute rest period
Over 6 hours to 10 hours	2 10-minute rest periods

Bridges Charter School Employee Handbook
Approved

Over 10 hours to 14 hours

3 10-minute rest periods

Nonexempt employees must observe assigned working hours, the time allowed for rest periods and report any missed rest period on the days' time record and to the employee's supervisor immediately. Employees are encouraged to report any concerns regarding meal or rest periods to the Administrative Coordinator or Administration.

PAYDAYS

Paydays for all employees will fall on the 15th and LAST DAY OF EACH MONTH. If a normally scheduled pay day falls on a weekend or holiday, paychecks will be processed the preceding business day.

If you have an automatic deposit for your paycheck, your funds will be deposited to the financial institution you requested by the end of business on the scheduled payday. While an automatic deposit may actually credit to your account before your actual "payday," the school is not responsible for automatic payments or withdrawals dated prior to your actual payday and you should not depend on early deposits of your pay.

PAYROLL WITHHOLDINGS

Bridges Charter School is required by law to withhold Federal Income Tax, State Income Tax, Social Security (FICA), State Teachers Retirement Service (STRS for eligible credentialed faculty or PERS, if the school participates) from each employee's paycheck as outlined below. Additionally, if a garnishment, tax levy, or an order to withhold child support payments should be delivered, Bridges Charter School must comply with that order within the time allowed by law and cannot postpone the payroll deduction for any reason. Voluntary deductions, which must be authorized in writing by employees, may include retirement plans, employee portion of insurance premiums, or any other benefit made available to employees.

If an employee believes an error has been made in his or her pay or deductions, Bridges Charter School will work in good faith to resolve errors as soon as possible. The employee should notify the Administrative Coordinator of any errors in pay or deductions withheld within seven (7) days from the date paid.

Every deduction from the employee's paycheck is explained on the check voucher/paystub. If the employee does not understand the deduction, then he or she should ask the Administrative Coordinator to explain it. The employee may change the number of withholding allowances he or she wishes to claim for Federal and/or State Income Tax purposes before any pay period by logging into the Employee Portal. Bridges Charter is not allowed to provide any form of tax advice to an employee.

SECTION 6 – CONDITIONS OF EMPLOYMENT

IMMIGRATION LAW COMPLIANCE

Bridges Charter School employs only those authorized to work in the United States in compliance with the Immigration and Control Act of 1986. Each new employee, as a condition of employment, must complete the Employment Eligibility Verification Form I-9 and present original documentation establishing identity and employment eligibility as outlined on the I-9 instruction forms. Former employees who are rehired must also complete the form if they have not completed an I-9 with Bridges Charter School within the past three years or if their previous I-9 is no longer retained or valid.

STAFF ACKNOWLEDGEMENT of IMMIGRATION ENFORCEMENT NOTICE & PROCEDURES

All employees will be asked to complete a form with the following information:

- Employee name and ID
- Emergency contact name(s)
- Relationship (spouse, parent, friend, etc.)
- Phone numbers and email
- Permission statement allowing the employer to notify the contact in an emergency or if the employee cannot communicate
- Employee signature and date

CREDENTIAL REQUIREMENTS

If you are a credentialed team member, you must provide copies of your credential, transcripts, and test scores prior to your first day of actual work. Failure to provide these documents may delay your ability to begin work.

You are also responsible for keeping the required certificates, credentials, and registrations current and in good standing, for paying the costs associated with renewal, and for providing both your Administrative Coordinator with verification of renewals. Failure to provide these updated documents to the school may result in suspension without pay until such time as the necessary documentation has been provided.

If you allow a credential, certificate, registration, or required course deadline to expire, or if you fail recertification, training, or testing, Bridges Charter School is required to remove you from the work schedule until you meet the requirements or renew your credential.

MANDATED TRAINING

As a condition of employment, all school employees must complete mandated training as designated by the school administration and in accordance with applicable provisions of the California Education Code. It is the employees responsibility to complete the training in a timely manner and to present proof of completion to the Administrative Coordinator as outlined at the start of each school year or upon employment.

TUBERCULOSIS TEST

Before the first day of employment, all new employees must have had a tuberculosis test as described in Education Code 49406 or a TB Risk Assessment (pursuant to AB1667) within the past 60 days. Employees transferring from other public or private schools within the State of California must either provide proof of an examination or a completed Risk Assessment within the previous 60 days or a certification showing that he or she was examined within the past four (4) years and was found to be free of communicable tuberculosis. The current physician's statement or Risk Assessment must be on file in the office before the first day of employment. Failure to provide documentation on time may result in a delay of your ability to begin work or termination.

The results of these tests are strictly confidential. A bubble TB Clearance is good for four years, a chest x-ray clearance is good for 10 years, and it is the employee's responsibility to remain in compliance and ensure the school has a valid certificate on file.

CRIMINAL BACKGROUND CHECK

Bridges Charter School recognizes the importance of maintaining a safe workplace with employees who are honest, trustworthy, qualified, reliable, and nonviolent, and do not present a risk of harm to students, coworkers or others. Bridges Charter School will perform applicant background checks and employee investigations as required by Education Code section 47605 [b][f], which requires that “each employee of the school furnishes the school with a criminal record summary.”

All employees must have Live Scan fingerprint results on file with Bridges Charter School. Proof of Live Scan fingerprinting is a requirement of employment, and the results must be provided to Bridges Charter School prior to the first day of work. Live Scan fingerprinting will be required of all job applicants, employees, and volunteers as required by California and federal law. These background checks are performed through a fingerprinting service coordinated by the California Department of Justice (DOJ) and the Federal Bureau of Investigation (FBI). Any and all information obtained by Bridges Charter School may be taken into consideration in evaluating one’s suitability for employment, promotion, reassignment, or retention as an Employee.

All fingerprint and background information must be completed and the results in the possession of Bridges Charter School before the first day of employment. Failure to complete this process will delay the employee’s ability to begin work.

Employees with adverse background information (such as certain specific criminal convictions) may be ineligible for employment with Bridges Charter School.

Bridges Charter School shall also request subsequent arrest notification from the Department of Justice and take all necessary action based upon such further notification and after an individualized assessment is conducted in accordance with applicable law.

All school employees are expected to notify administrative staff as soon as possible of any infraction or arrest that may impact their employment and to work with the administration to minimize any potential impact on the school community.

For additional information on background checks, please contact the Administrative Coordinator.

CHILD ABUSE AND NEGLECT REPORTING ACT

Since our employees work directly with children, they are in a position to detect instances of child abuse and neglect. It is Bridges Charter School’s policy that all school employees shall comply with the California State law regarding child abuse reporting procedures. Section 11166 of the California Penal Code mandates the reporting to designated authorities of cases of suspected child abuse as follows:

“Any child care custodian, health practitioner, or employee of a child protective agency who has knowledge of or observes a child in his or her professional capacity or within the scope of his or her employment whom he or she knows or reasonably suspects has been the victim of child abuse shall report the known or suspected instance of child abuse to a child protective agency immediately or as soon as practically possible by telephone and shall prepare and send a written report thereof within 36 hours of receiving the information concerning the incident.”

While each employee has the responsibility to ensure the reporting of any child, he/she suspects is a victim of abuse, the employee is not to verify the suspicion or prove that abuse has occurred. Classroom teachers who become aware of suspected child abuse should immediately report the suspicions as required.

Bridges Charter School Employee Handbook
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It is extremely important that Bridges Charter School employees comply with the requirements of the Child Abuse and Neglect Reporting Act (CANRA). No mandated reporter can be held civilly or criminally liable for any report required or authorized by CANRA. In addition, any other person who voluntarily reports a known or suspected incident of child abuse or neglect will not incur civil or criminal liability unless it is proven that the report was false and the person knew the report was false or made the report with reckless disregard of its truth or falsity.

The Director of Daily Operation is available to answer any questions employees may have about their responsibilities under CANRA, or to assist an employee in making a report under CANRA. If an employee makes a report pursuant to CANRA without Bridges Charter School's assistance, he or she is required to notify Bridges Charter School of the report if it is based on incidents he or she observed or became aware of during the course and scope of his or her employment with Bridges Charter School.

PERSONNEL FILES

An employee or former employee (or designee) has the right to inspect or receive a copy of their personnel records at reasonable times, at a reasonable place, and on reasonable advance notice to the Administrative Coordinator. All requests should be put in writing and will be retained by Administration. If the request includes a request for copies the employee or former employee may be required to pay for the actual costs of copying. The employer will respond to such a request within 30 days of receipt of the written request.

Employees are not entitled to inspect or copy letters of reference, records that relate to an investigation of possible criminal activity, ratings, reports or records obtained prior to employment, prepared by examination committee members or obtained in connection with a promotional examination.

CHANGES IN EMPLOYMENT

An employee is responsible for notifying the Administrative Coordinator about changes in the employee's personal information and changes affecting the employee's status (for example, name changes, address or telephone number changes, marriages or divorces, etc.). This notification by the employee must occur as closely as possible, but no later than 30 days following the change. **It is the employee's responsibility to make all appropriate changes in the Employee Portal, Paychex.**

SECTION 7 – PERFORMANCE

EMPLOYEE PERFORMANCE REVIEW

Supervisors will generally conduct performance reviews with all regular full-time and regular part-time employees bi-annually but may conduct them annually based on need. Supervisors may conduct informal performance reviews and goal setting sessions more often if they choose.

Performance reviews are designed for the supervisor and the employee to discuss his/her current job tasks, encourage and recognize attributes, and discuss positive, purposeful approaches for meeting work-related goals. Together, employees and supervisors discuss ways in which the employee can accomplish goals or learn new skills. The goal setting sessions are designed for the employee and his/her supervisor to make and agree on new goals, skills, and areas for improvement.

Bridges Charter School Employee Handbook
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Your performance review and goal setting sessions may or may not have a direct effect on any changes in your compensation. For this reason, among others, it is important to prepare for these reviews carefully and participate in them fully.

Bridges Charter School’s provision of performance evaluations does not alter the at-will employment relationship. Nothing in this policy shall limit the right to terminate employment at will or limit the Bridges Charter School’s right to transfer, demote, suspend, administer discipline, and change the terms and conditions of employment at its sole discretion. Employment is at the mutual consent of the employees and Bridges Charter School. Accordingly, either the employee or Bridges Charter School can terminate the employment relationship at-will, at any time, with or without reason and with or without notice.

Basis for Determining Pay

Numerous factors may influence your rate of pay, including but not limited to, education, experience, training and/or the operational needs of the school. It is Bridges Charter School’s goal to have a current Job Description for each employee that broadly defines the job responsibilities and essential functions for each position.

While Bridges Charter School strives to complete wage increase determinations on an annual basis, there is no guarantee that employees will receive a salary increase, cost of living adjustment or promotion every school year. Salary increases, cost of living adjustments and promotions are solely within the discretion of Bridges Charter School and depend upon many factors in addition to performance. Positive performance evaluations, however, do not guarantee increases in salary or promotions. Increases may be determined on the basis of various factors including, but not limited to, performance, adherence to school policies and procedures, ability to meet or exceed duties per job description, salary schedules/ranges/bands, achievement of performance goals, or operational factors.

Changes to the amount of an employee’s wage or salary will become effective on the first regular pay period following the change.

SECTION 8 – LEAVES

Family Care and Medical Leave

This policy explains how 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 leave in any twelve (12) month period for the purposes enumerated below. For purposes of this policy, all leave taken under FMLA or CFRA will be referred to as “FMLA leave.”

1. Employee Eligibility Criteria:
 - a. To be eligible for FMLA leave, the employee must have been employed by the School for a total of at least twelve (12) months and must have worked at least 1,250 hours during the twelve (12) month period immediately preceding commencement of the FMLA leave.

1. Events That May Entitle an Employee to FMLA Leave:

- a. The twelve (12) weeks (or twenty-six (26) workweeks where indicated) FMLA allowance includes any time taken (with or without pay) for any of the following reasons:
 - b. To care for the employee’s newborn child or a child placed with the employee for adoption or foster care. Leaves for this purpose must conclude twelve (12) months after the birth, adoption, or placement. If both parents are employed by the school, they will be entitled to a combined total of twelve (12) weeks of leave for this purpose.
 - c. Because of the employee’s own serious health condition (including a serious health condition resulting from an on-the-job illness or injury) that makes the employee unable to perform any one or more of the essential functions of his or her job (other than a disability caused by pregnancy, childbirth, or related medical conditions, which is covered by the school’s separate pregnancy disability policy).
 - d.
 - i. A “serious health condition” is an illness, injury (including, but not limited to, on-the-job injuries), 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.
 - ii. “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 an “inpatient” when a health care facility formally admits him/her to the facility with the expectation that he/she will 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.
 - iii. “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.
 - iv. “Continuing treatment” means ongoing medical treatment or supervision by a health care provider.
 - e. To care for a spouse, domestic partner, child, or parent with a serious health condition or military service-related injury. When an employee is providing care to a spouse, son, daughter, parent, or next of kin who is a covered Armed Forces service member with a serious injury or illness, the employee may take a maximum of twenty-six (26) weeks of FMLA leave in a single twelve (12) - month period to provide said care.
 - f. For any “qualifying exigency” because the employee is the spouse, son, daughter, 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.

2. Amount of FMLA Leave Which May Be Taken

- a. FMLA 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.
- b. In addition to the twelve (12) workweeks of FMLA leave that may be taken, an employee who is the spouse, son, daughter, 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.
- c. The “twelve-month period” in which twelve (12) weeks of FMLA leave may be taken is the twelve (12) month period immediately preceding the commencement of any FMLA leave.
- d. If a holiday falls within a week taken as FMLA leave, the week is nevertheless counted as a week of FMLA leave. If, however, the school’s business activity has temporarily ceased for some reason and employees are generally not expected to report for work for one or more weeks, such as the Winter Break, Spring Break, or Summer Vacation, the days the School’s activities have ceased do not count against the employee’s FMLA leave entitlement. Similarly, if an employee uses FMLA 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 CFRA entitlement unless the employee was otherwise scheduled and expected to work during the holiday.

3. Pay during FMLA Leave

- a. An employee on FMLA leave because of his/her own serious health condition must use all accrued paid sick leave at the beginning of any otherwise unpaid FMLA leave period. If an employee is receiving a partial wage replacement benefit during the FMLA 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.
- b. An employee on FMLA leave for childcare 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.
- c. If an employee has exhausted his/her sick leave, leave taken under FMLA shall be unpaid leave unless the employee is eligible for Parental Leave.
- d. The receipt of sick leave or Parental Leave pay, or State Disability Insurance benefits will not extend the length of the FMLA leave. Sick pay accrued during any period of unpaid FMLA leave only until the end of the month in which unpaid leave began.

- e. A regular employee who is disabled as a result of pregnancy, or becomes a new parent through childbirth, adoption, or foster placement, including domestic partners of new parents through childbirth, adoption, or foster placement, shall be entitled to take up to sixty (60) days of Parental Leave. You must first exhaust all available sick leave, including all accumulated sick leave, and continue to be absent from your duties on account of parental leave in order to gain access to differential pay. The 12-work-week differential period is reduced by any period of sick leave, including accumulated sick leave, taken during parental leave. Differential pay is the difference between their salary (daily rate of pay) and the cost of a substitute per day or 50% of their regular salary (daily rate). Differential pay shall be paid at a rate of no less than 50% of the employee's salary.
- f. No employee may receive more than sixty (60) days of Parental Leave per year, or per childbirth, adoption, or foster placement. Temporary and substitute employees are not eligible for Parental Leave. If an employee does not return after a Parental Leave s/he shall reimburse the school for health and welfare benefits paid during the summer months

4. Health Benefits

The provisions of the school's various employee benefit plans govern continuing eligibility during FMLA leave, and these provisions may change from time to time. The health benefits of employees on FMLA 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 had been continuously employed during the leave period. When a request for FMLA 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 his/her 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.

BRIDGES CHARTER SCHOOL may recover the health benefit costs paid on behalf of an employee during his/her FMLA 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 he/she works less than thirty (30) days after returning from FMLA 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 leave, or other circumstances beyond the control of the employee.

5. Seniority

An employee on FMLA leave remains an employee and the leave will not constitute a break in service. An employee who returns from FMLA leave will return with the same seniority he/she had when the leave commenced. An employee who was absent from work while fulfilling his or her covered service obligation under the Uniformed Services Employment and Reemployment Rights Act ("USERRA") shall be credited, upon his or her return to the school, with the hours of service that would have been performed but for the period of absence from work due to or necessitated by USERRA-covered service.

6. Medical Certifications

- a. An employee requesting FMLA leave because of his/her own or a relative'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.
- b. 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 or clarify information in a deficient certification if the employee is unable to cure the deficiency.
- c. 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 from the first one, the school will pay for a third, mutually agreeable, health care provider to provide a final and binding opinion.
- d. Recertification is required if leave is sought after expiration of the time estimated by the health care provider. Failure to submit required recertification can result in termination of the leave.

7. Procedures for Requesting and Scheduling FMLA Leave

- a. An employee should request FMLA leave by completing a Request for Leave form and submitting it to the director. An employee asking for a Request for Leave form will be given a copy of the school's then-current FMLA leave policy.
- b. Employees should provide not less than thirty (30) days' notice for foreseeable childbirth, placement, or any planned medical treatment for the employee or his/her spouse, domestic partner, child, or parent. Failure to provide such notice is grounds for denial of a leave request, except if the need for FMLA leave was an emergency or was otherwise unforeseeable.
- c. Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt the school's operations.
- d. If FMLA leave is taken because of the employee's own serious health condition or the serious health condition of the employee's spouse, domestic partner, parent or child, 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.
- e. If FMLA 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 leave for this purpose of at least one day but less than two (2) weeks' duration on any two (2) occasions.

- f. 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 family member, the employee may be transferred temporarily to an available alternative position for which he or she is qualified that has equivalent pay and benefits and that better accommodates recurring periods of leave than the employee's regular position.
- g. The school will respond to an FMLA leave request no later than five (5) days of receiving the request. If an FMLA leave request is granted, the school will notify the employee in writing that the leave will be counted against the employee's FMLA leave entitlement. This notice will explain the employees' obligations and the consequences of failing to satisfy them.

8. Return to Work

- a. Upon timely return at the expiration of the FMLA leave period, an employee (other than a "key" employee whose reinstatement would cause serious and grievous injury to the School's operations) 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 leave.
- b. When a request for FMLA leave is granted to an employee (other than a "key" employee), the school will give the employee a written guarantee of reinstatement at the termination of the leave (with the limitations explained above).
- c. Before an employee will be permitted to return from FMLA leave taken because of his/her own serious health condition, the employee must obtain a certification from his/her health care provider so that he/she is able to resume work.
- d. 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.

9. Limitations on Reinstatement

- a. BRIDGES CHARTER 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.
- b. 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 he/she qualifies as a "key" employee and the potential consequences with respect to reinstatement and maintenance of health 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.

10. Employment during Leave

No employee, including employees on FMLA 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.

Pregnancy Disability Leave

This policy explains how the school complies with the California Pregnancy Disability Act, which requires the school to give each female employee an unpaid leave of absence of up to four (4) months, as needed, for the period(s) of time a woman is actually disabled by pregnancy, childbirth, or related medical conditions.

- Employee Eligibility Criteria

To be eligible for pregnancy disability leave, the employee must be disabled by pregnancy, childbirth, or a related medical condition and must provide appropriate medical certification concerning the disability.

- Events That May Entitle an Employee to Pregnancy Disability Leave

The four (4) -month pregnancy disability leave allowance includes any time taken (with or without pay) for any of the following reasons:

- The employee is unable to work at all or is unable to perform any one or more of the essential functions of her job without undue risk, the successful completion of her pregnancy, or to other persons because of pregnancy or childbirth, or because of any medically recognized physical or mental condition that is related to pregnancy or childbirth (including severe morning sickness); or
- The employee needs to take time off for prenatal care.

□ Duration of Pregnancy Disability Leave

Pregnancy disability leave may be taken in one or more periods, but not to exceed four months total. “Four months” means the number of days the employee would normally work within four months. For a full-time employee who works five (5) eight (8) hour days per week, four (4) months means 693 hours of leave (40 hours per week times 17 1/3 weeks).

For employees who work more or less than forty (40) hours per week, or who work on variable work schedules, the number of working days that constitutes four (4) months is calculated on a pro-rata or proportional basis. For example, for an employee who works twenty (20) hours per week, “four months” means 346.5 hours of leave entitlement (20 hours per week times 17 1/3 weeks). For an employee who normally works forty-eight (48) hours per week, “four months” means 832 hours of leave entitlement (48 hours per week times 17 1/3 weeks).

At the end or depletion of an employee’s pregnancy disability leave, an employee who has a physical or mental disability (which may or may not be due to pregnancy, childbirth, or related medical conditions) may be entitled to reasonable accommodation. Entitlement to additional leave must be determined on a case-by case basis, taking into account a number of considerations such as whether an extended leave is likely to be effective in allowing the employee to return to work at the end of the leave, with or without further reasonable accommodation, and whether or not additional leave would create an undue hardship for the School. The School is not required to provide an indefinite leave of absence as reasonable accommodation.

Pregnancy disability leave does not count against the leave which may be available as Family Care and Medical Leave.

Pay during Pregnancy Disability Leave

- An employee on pregnancy disability leave must use all accrued paid sick leave and may use any or all accrued vacation time at the beginning of any otherwise unpaid leave period. Upon exhaustion of sick and/or vacation leave, an employee on pregnancy disability leave may utilize Parental Leave.
- The receipt of vacation/sick leave/Parental Leave pay, or state disability insurance benefits, will not extend the length of pregnancy disability leave.
- Vacation and sick pay accrued during any period of unpaid pregnancy disability leave until the end of the month in which the unpaid leave began.

HEALTH BENEFITS DURING DISABILITY LEAVE

BRIDGES CHARTER SCHOOL shall provide continued health insurance coverage while an employee is on pregnancy disability leave consistent with applicable law. The continuation of health benefits is for a maximum of four (4) months in a twelve (12) -month period. BRIDGES CHARTER SCHOOL can recover premiums that it already paid on behalf of an employee if both of the following conditions are met:

- The employee fails to return from leave after the designated leave period expires.
- The employee's failure to return from leave is for a reason other than the following:

WORKERS' COMPENSATION LEAVE

Employees that are temporarily disabled due to a work-related illness or injury will be placed on workers' compensation leave. The duration of your leave will depend upon the rate of your recovery and the medical provider's recommendation. Workers' compensation leave will run concurrently with any other applicable medical leave of absence (i.e., FMLA/CFRA if applicable). The Administrative Coordinator will reach out to employees that have requested a workers' compensation leave regarding employer provided health insurance benefits. If you have any questions concerning this leave and/or any benefit related questions, please contact the Administrative Coordinator.

BEREAVEMENT LEAVE

Bridges Charter School guarantees all employees who have worked for the school for at least 30 days five days of unpaid bereavement leave from work after the death of an immediate family member. This includes a parent (including an in-law and stepparent), spouse, domestic partner, dependent, sibling, stepsibling, grandparent or grandchild. Employees may use your accrued paid time off such as vacation and sick time. Employees must take bereavement leave within three months of the death. Employees have the choice to take off the days all together or separately over the three months.

JURY DUTY LEAVE

All employees who receive a notice of jury/witness duty must notify their supervisor as soon as possible so that arrangements may be made to cover the absence. In addition, employees must provide a copy of the official jury/witness duty notice to their supervisor. Employees must report for work whenever the court schedule permits. Either the School or the employee may request an excuse from jury/witness duty if, in the school's judgment, the employee's absence would create serious operational difficulties.

Employees will be granted paid time off for jury duty up to five (5) working days per 12-month period. Paid leave for jury duty is available only to an employee who has been working at Bridges Charter School for a minimum of one full academic year. All other employees will receive time off without pay for the entire duration of jury duty. Likewise, any time beyond 5 days necessary to complete jury duty will be without pay for those employees receiving paid jury duty for the first 5 days. However, employees may elect to substitute accrued Personal Necessity Leave or Compensated Time Off (discussed below) during any unpaid leave due to jury duty. An employee receiving pay while on jury duty (whether Jury Duty pay, or CTO) will be paid at his or her regular rate of pay for the hours the employee was scheduled to work that day, regardless of the time actually spent at jury duty.

Employees must inform the Administration of the need for jury duty as soon as they receive the summons or subpoena to appear. Once jury duty is completed, the employee must submit a receipt from the court verifying the time spent in court to the Administrative Coordinator. Employees may keep any travel allowance they received from the court.

In the event that the employee must serve as a witness within the course and scope of his or her employment with the School, the School will provide time off with pay.

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TIME OFF TO VOTE

The school will allow any nonexempt employee who is a registered voter and does not have enough time outside of working hours to vote in a statewide election up to two (2) hours of work time without a loss of pay to vote. The request must be made for at least two (2) working days in advance. The time must be at the beginning or end of the employee's regular shift, whichever allows the most free time for voting and the least time off from work unless the school and the employee agree otherwise. The employee may be required to prove he or she is a registered voter.

An employee may also serve as an election official on Election Day without being disciplined, however the school will not pay the employee for this time off. Vacation or personal hours which have accrued but not been used may be paid to the employee for this time off.

SCHOOL APPEARANCE/SUSPENSION LEAVE

If the parent or guardian of a child facing suspension from school is summoned to the school to discuss the matter, the employee should alert his or her supervisor as soon as possible before leaving work. In compliance with California Labor Code section 230.7, no discriminatory action will be taken against an employee for taking time off for this purpose.

This leave is unpaid, but the employee may choose to use accrued vacation, or personal time off (PTO). You will not be discharged or discriminated against because of an absence protected by this law.

CRIME VICTIM LEAVE

Employees are allowed to be absent from work to attend judicial proceedings related to a violent felony, serious felony (as defined by the California Penal Code) or felonies related to theft or embezzlement if they are:

- A victim of such a crime.
- An immediate family member (i.e., spouse, registered domestic partner, child, stepchild, sibling, step-sibling, parent, step-parent, or the child or a registered domestic partner) is a victim of such a crime.

An employee must give reasonable advance notice to the school by providing documentation of the proceedings. Documentation may be from any of the following:

- Notice from the court or government agency setting the hearing.
- The district attorney or prosecuting attorney's office; or
- The victim/witness assistance office advocating on the victim's behalf.

This leave is unpaid, but the employee may choose to use accrued vacation, sick or personal time off (PTO). You will not be discharged or discriminated against because of an absence protected by this law.

DOMESTIC VIOLENCE LEAVE/SEXUAL ASSAULT LEAVE

If you are a victim of domestic violence, you may take time off to obtain or attempt to obtain judicial relief, such as obtaining restraining orders, to help insure your health, safety or welfare or that of your child(ren). Employees may use available vacation (if applicable) or accrued PSL. Otherwise, the time off is unpaid. All employees can take time off from work to get medical attention or services from a domestic violence shelter, program, or rape crisis center, or receive psychological counseling or safety planning related to domestic violence, sexual assault, or stalking. Domestic violence, sexual assault and stalking victim's leave for medical treatment does not exceed or add to the unpaid leave time that FMLA/CFRA allows.

You must give the school reasonable notice unless advance notice is not feasible and provide certification that you are seeking such assistance.

Certification may be sufficiently provided by any of the following:

- A police report indicating that you were a victim of domestic violence or sexual assault.
- A court order protecting or separating you from the perpetrator of an act of domestic violence or sexual assault, or other evidence from the court or prosecuting attorney that you appeared in court; or,
- Documentation from a medical professional, domestic violence advocate, health care provider, or counselor that you are undergoing treatment for physical or mental injuries or abuse resulting in victimization from an act of domestic violence or sexual assault.

Employees have the right to ask the school for help or changes in their workplace to make sure they are safe at work. The school will work with its employees to see what changes can be made. Changes in the workplace may include putting in locks, changing shifts or phone numbers, transferring or reassigning the employee, or help with keeping a record of what happened to the employee. The school may ask the affected employee for a signed statement certifying that this request is for a proper purpose and may also request proof showing the need for accommodation. The School will maintain confidentiality regarding any requests for accommodations under this policy.

The school will, to the extent allowed by law, maintain the confidentiality of an employee requesting leave under this provision. The School will not discharge, discriminate or retaliate against an employee who exercises their rights under this law. Domestic violence, sexual assault and stalking victim's leave for medical treatment does not exceed or add to the unpaid leave time that FMLA/CFRA allows.

Bridges Charter School is committed to ensuring employees are not treated differently or retaliated against because of any of the following:

- The employee is a victim of domestic violence, sexual assault, or stalking.
- The employee asked for time off to get help.
- The employee asked Bridges Charter School for help or changes in the workplace to ensure safety at work.

Employers are prohibited from discharging, discriminating or retaliating against an employee who is a victim of domestic violence or the victim of sexual assault for taking time off to seek medical attention, obtain services from a domestic violence shelter or program or rape crisis center, obtain psychological counseling, participate in safety planning, or temporary or permanent relocation. If any employee believes that he or she has experienced retaliation or discrimination as a result of

conduct protected by this policy, the employee may file a complaint with his or her supervisor and/or the Labor Commissioner's Office.

For more information, contact the Labor Commissioner's Office by phone at 213897-6595 or visit a local office by finding the nearest one on the website: www.dir.ca.gov/dlse/DistrictOffices.htm. The Labor Commissioner's Office provides an interpreter at no cost to the employee, if needed.

SECTION 9 – BENEFITS

SICK LEAVE

Sick Leave Policy for Classified and/or hourly Employees

Bridges Charter School provides sick leave benefits to support the health and well-being of our valued classified staff. This policy outlines provisions for both part-time and full-time classified employees in accordance with **California Education Code §45191** and **California Labor Code §246**.

Part-Time Classified Staff - hourly employees

- **Eligibility:** Part-time classified hourly employees working less than full time but on a regular schedule are eligible for sick leave. However, per Labor Code § 246(c), there is a 30-calendar-day waiting period before new employees may begin using sick leave.
- **Allocation:** Part-time classified staff are provided **40 hours of paid sick leave per school year**, front-loaded at the start of each academic year.
- **Carryover:** Paid sick leave for part-time employees is front-loaded each school year. Because the full annual allotment is provided at the start of the year, unused hours do not carry over.
- **Usage:**
 - The employee's own illness, injury, or preventive medical care;
 - The diagnosis, care, or treatment of a health condition or preventive care for a family member;
 - Leave related to domestic violence, sexual assault, or stalking;

Full-Time Classified Staff (hourly employees) and Designated Essential Office Staff

- **Eligibility:** Classified staff working full time (defined as 40 hours per week on a 10-month schedule) or staff designated as essential office staff are eligible for full sick leave benefits. However, per Labor Code § 246(c), there is a 30-calendar-day waiting period before new employees may begin using sick leave.

**Essential office staff shall be defined by administration as critical to the operation of the school opening and closing and work more than 200 days per year.

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- **Allocation:** Full-time classified employees are granted **80 hours (10 days)** of paid sick leave annually, in compliance with **Education Code §45191**.
- **Carryover:** Unused sick leave may be **carried over** from year to year with no cap on accrual for the purpose of retirement, as required by state law. Accrued sick leave is not cashed out upon resignation or termination.
- **Usage:**
 - All accrued days remain available in a school calendar year accessible for sick leave:
 - The employee’s own illness, injury, or preventive medical care;
 - The diagnosis, care, or treatment of a health condition or preventive care for a family member;
 - Leave related to domestic violence, sexual assault, or stalking;

General Provisions

- Sick leave must be used in increments consistent with the employee’s scheduled work hours.
- Employees may be required to provide documentation from a healthcare provider if absent for more than three consecutive days but in line with state law.
- Abuse of sick leave may result in disciplinary action.
- Accrued sick leave may be transferred between public school districts within California if employment is continuous per **Education Code §45202**.

Sick Leave Policy – Certificated and Administrative Staff

Bridges Charter School provides sick leave benefits in support of the health and well-being of all employees. Sick leave may be used for the employee’s own illness or preventive care, or that of a qualifying family member, and is administered in compliance with **California Education Code §44978**, **Labor Code §246**, and applicable state regulations.

Certificated Part-Time Staff

- **Eligibility:** Certificated employees working part-time are eligible for paid sick leave.
 - However, per Labor Code § 246(c), there is a 30-calendar-day waiting period before new employees may begin using sick leave.
- **Allocation:** Part-time certificated staff are granted **40 hours of paid sick leave per school year**, front-loaded at the beginning of each school year.
- **Carryover:** Unused sick leave **carries over from year to year with no cap** on accrual for the purpose of retirement.
- **Usage:**
 - Any employee will have an annual cap of up to 80 hours in a school calendar year accessible for sick leave:

- The employee’s own illness, injury, or preventive medical care;
 - The diagnosis, care, or treatment of a health condition or preventive care for a family member;
 - Leave related to domestic violence, sexual assault, or stalking;
- **Reporting:** Employees must follow school protocols for reporting absences and may be asked to provide documentation for extended absences.

Certificated Full-Time Staff

- **Eligibility:** Certificated employees working full-time (typically on a 10-month academic school year) are entitled to annual sick leave. However, per Labor Code § 246(c), there is a 30-calendar-day waiting period before new employees may begin using sick leave.
- **Allocation:** Full-time certificated staff are provided with **ten (10) days of sick leave** (80 hours) per school year, credited at the beginning of the year.
- **Carryover:** Unused sick leave **carries over indefinitely**, with **no cap** on accumulation, in accordance with **Education Code §44978**.
- **Usage & Transfer:**
 - The employee’s own illness, injury, or preventive medical care;
 - The diagnosis, care, or treatment of a health condition or preventive care for a family member;
 - Leave related to domestic violence, sexual assault, or stalking;
 - Accrued sick leave is transferable between California school districts if the break in service does not exceed one year (**Education Code §44979**).

Coordination of Sick Leave Benefits with Other Benefits

Bridges will pay sick leave benefits (to the extent they have been accrued) to an eligible employee during the normal waiting period, if applicable, before the employee is paid workers' compensation benefits pursuant to the applicable state and federal law governing industrial injury or illness. Similarly, **Bridges** will pay sick leave benefits during the normal waiting period, if applicable, before the eligible employee is paid benefits from other insured unemployment disability plans. It is your responsibility to apply for any disability benefits for which you may be eligible as a result of illness or disability, including California State Disability Insurance, workers' compensation insurance, and/or any short-term disability insurance benefits for which you qualify.

Personal Necessity Leave

Up to seven days of accrued sick leave may be used for reasons of personal necessity pursuant to Ed Code 45207. The employee may not use more than seven (7) in a single school year for personal necessity. Once an employee reaches the maximum amount of personal necessity days, any further days will be taken without pay:

Bridges Charter School Employee Handbook
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1. Illness of immediate family members,
2. Death of a member of the employee's immediate family,
3. Accident involving the person or property of the employee or immediate family,
4. Appearance in court, or
5. Other reasons **as approved by the administration**. Requests must be submitted with reasonable advance notice. A standard expectation of 72 hours.

Administrative 12-Month Staff

- Eligibility:** School employees in 12-month administrative positions are entitled to a full year of sick leave benefits.
- Allocation:** Administrative staff working year-round are granted **96 hours (12 days)** of paid sick leave annually, credited at the beginning of the fiscal year (July 1).
- Carryover:** Any unused sick leave **carries over from year to year with no cap** on accrual.
- Usage:**
 - The employee's own illness, injury, or preventive medical care;
 - The diagnosis, care, or treatment of a health condition or preventive care for a family member;
 - Leave related to domestic violence, sexual assault, or stalking;
 - Documentation may be required for absences longer than three consecutive days.

General Provisions for All Groups

- Sick leave is not payable upon separation or resignation.
- Abuse or misuse of sick leave privileges may result in disciplinary action.
- All employees must notify their supervisor or designated contact as early as possible when using sick leave.

Catastrophic Leave

Upon determination that the employee is unable to work due to his/her own or a family member's catastrophic illness or injury, any other employee, upon written notice to the Governing Board, may donate accrued vacation and/or sick leave credits to the requesting employee. Donations shall be given in workday equivalents only (i.e. if eight hours is a workday donated to a three-hour employee, those eight hours will count as the three-hour employee's entire workday).

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Eligible leave credits may be donated to an employee for a catastrophic illness or injury if all of the following requirements are met:

- At the beginning of each school year, a voluntary sick leave pool shall be established. Employees may voluntarily donate accrued sick leave days to the pool. The pooled days may be used by eligible employees who have exhausted their individual sick leave due to a qualifying medical condition, subject to administrative approval
- The employee who is, or whose family member is, suffering from a catastrophic illness or injury requests that eligible leave credits be donated and provides verification of catastrophic injury or illness as required by the governing board of the school in which he or she is employed.
- The governing board of the school determines that the employee is unable to work due to the employee's or his or her family member's catastrophic illness or injury.
- The employee has exhausted all accrued paid leave credits.
- If the transfer of eligible leave credits is approved by the governing board of the school, any employee may, upon written notice to the governing board of the school, donate eligible leave credits at a minimum of eight hours, and in hour increments thereafter.
- An employee who receives paid leave pursuant to this section shall use any leave credits that he or she continues to accrue on a monthly basis prior to receiving paid leave pursuant to this section.
- Employees may donate no more than five workday equivalents per school year per person requesting catastrophic leave.
- To ensure that employees retain sufficient accrued sick leave to meet their own needs, donors shall not reduce their accumulated sick leave to fewer than 20 days.
- Upon resigning from the school, an employee may donate a maximum of five workday equivalents of accrued vacation and/or sick leave credits to the requesting employee. All unused donated leave credit shall be given back to the donors in reverse order of contribution.
- All donations are confidential.
- The employee who is the recipient of the donated leave credits shall use those credits within 12 consecutive months.
- An employee who receives paid catastrophic leave shall use any leave credits that he/she continues to accrue on a monthly basis before receiving paid leave pursuant to this program.
- No donated sick leave may be accrued by the recipient for the purposes of retirement, vacation, or any other use beyond that of the original documented need request.
- Donations made under the catastrophic leave program shall be strictly voluntary.

VACATION

Standard Vacation Policy

The following full-time, regular employees are eligible for vacation benefits: Classified employees who work over 225 days annually shall receive vacation benefits on a basis equal to that percentage that the actual work month bears to full-time. (For example, a full-time employee will earn 1 day of vacation per 1 month of service credit up to 10 days per calendar year). No more than 10 vacation days may be accrued. Vacation credit shall accumulate from the first day of regular employment. Vacation days will not accrue during any unpaid leave of absence. Please note that an equivalent of no more than one week of earned vacation may be carried over into a new fiscal year. The employee shall be paid for any vacation balance in excess of the maximum carryover at the end of each fiscal year using the employee's current rate of pay as of June 30th.

Requests to use vacation days by these employees must be submitted in writing at least 2 weeks in advance to the Administrative Coordinator. These employees will not be approved for more than 10 days of vacation in a single academic year.

Vacations shall be scheduled in such a way as to provide adequate coverage of job responsibilities and staffing requirements. Although Bridges Charter School will attempt to accommodate vacation requests to the greatest extent possible, there is no guarantee that any given vacation request will be granted. If a holiday occurs during an employee's vacation period, the employee will receive holiday compensation for that day.

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Approved

Upon termination of employment the eligible employees listed above will be paid for all accrued, but unused vacation time at their current rate of pay. Employees are not entitled to pay in lieu of taking vacation except upon termination of employment.

Health and Welfare Benefits Contribution

Bridges Charter School provides employer contributions toward employee health and welfare benefits through a group benefits program using composite-rated premiums.

Composite	Rate	Definition
A composite rate is a single, fixed premium for each level of coverage, regardless of an individual employee’s age, gender, or number of dependents. All employees enrolled in the same coverage tier pay the same base premium, simplifying costs and ensuring consistency across the organization.		

Eligibility and employer contributions are based on Full-Time Equivalent (FTE) status and employee classification, as follows (Full-Time is defined as .75 FTE or greater):

Eligibility and Employer Contributions

1.0 FTE Employees (Full-Time): Employees working 1.0 FTE are eligible for the full employer contribution of \$20,196 annually

0.75 – 0.99 FTE Employees (Full-Time): Employees working between 0.75 and 0.99 FTE are eligible for employer contribution, set at \$18,176 annually, 90% of the contribution.

Part-time employees are not eligible for benefits coverage through the school.

Application of Contributions

- Employer contributions are distributed on a monthly basis and prorated over the number of checks received (not including checks received for summer withholding).
- Contributions are applied directly toward the cost of elected health and welfare benefits
- Any remaining premium cost is the responsibility of the employee and will be deducted from payroll on a pre-tax basis, where applicable.

Employer contributions are distributed on a monthly basis and applied directly toward premium costs. Any remaining balance is the responsibility of the employee and will be deducted from payroll on a pre-tax basis, where applicable.

This contribution structure reflects differences in annual work schedules and total compensated time across certificated and classified roles, ensuring alignment with the school’s overall compensation framework.

FTE	Determination	and	Annual	Look-Back
Employee FTE status for benefits eligibility and employer contribution levels is determined annually through a “look-back” process conducted each August prior to the start of the school year. This review establishes the employee’s benefit eligibility and contribution level for the upcoming plan year.				

If an employee's FTE changes during the school year, Bridges Charter School reserves the discretion to adjust benefits eligibility and employer contributions in accordance with plan rules and administrative guidelines.

Cash in-lieu

Benefit eligible employees can receive Cash in Lieu instead of partaking in the employer sponsored plans.

1. Employees working between .75-.99 FTE can receive an annual stipend of \$1,500. Employees working 1.0 FTE can receive an annual stipend of \$3,000.
2. Cash in lieu is an option for benefit eligible employees who can provide proof of coverage from another employer-sponsored plan. If opting for cash in lieu, proof of coverage is required annually during the open enrollment period.

Bridges Charter School reserves the right to modify benefits offerings and employer contribution levels in accordance with plan changes, regulatory requirements, and organizational needs. If medical insurance premium rates increase, employees may be required to contribute to the cost of the increase to retain coverage. Unless otherwise mandated by law, employees on a leave of absence may be responsible for selecting continuing health coverage and paying the premium for such coverage through COBRA. If you have any benefit related questions while on leave of absence, please contact the Administrative Coordinator.

COBRA BENEFITS

The Federal Consolidated Budget Reconciliation Act (COBRA) gives employees and their qualified beneficiaries the opportunity to continue health insurance coverage under Bridges Charter School's health plan when a "qualifying event" would normally result in the loss of eligibility.

Some common qualifying events are resignation, termination of employment, or death of an employee, a reduction in an employee's hours or leave of absence, divorce or legal separation and a dependent child no longer meeting eligibility requirements.

Under COBRA, the employee or beneficiary pays the full cost of coverage at Bridges Charter School group rates plus an administration fee. Bridges Charter School or our carrier provides each eligible employee with a written notice describing rights granted under COBRA when the employee becomes eligible for coverage under "CHARTER SCHOOL's health insurance plan. The notice contains important information about the employee's rights and obligations.

SOCIAL SECURITY/MEDICARE

If you are a full-time regular employee contributing to a teacher's retirement system (PERS/STRS), your earnings from this job are not covered under Social Security (nor is Social Security withdrawn from your pay). When you retire, or if you become disabled, you may receive a pension based on earnings from this job. If you do, and you are also entitled to a benefit from Social Security based on either your own work or the work of your spouse, or former spouse, your pension may affect the amount of the Social Security benefit you receive. Your Medicare benefits, however, will not be affected.

Bridges Charter School withholds income tax from all employees' earnings and, if elected, participates in FICA (Social Security) for temporary employees and Medicare withholding and matching programs as required by law.

WORKER'S COMPENSATION INSURANCE

Eligible employees are entitled to workers' compensation insurance benefits when suffering from an occupational illness or injury. This benefit is provided at no cost to the employee.

In the event of an occupational injury or illness (as defined under Workers' Compensation Law) an employee may be covered by workers' compensation insurance instead of group insurance.

If an employee should become injured or in any way disabled on the job, he or she must report the injury immediately to his or her supervisor. It is a felony to file a fraudulent or false workers' compensation claim.

CHILDCARE

As a benefit of employment at Bridges Charter School, classified and certificated employees can send their children to our after-school Extensions program as a complimentary service. Fees for after school enrichment classes still apply, however.

This benefit is available with the following parameters:

- You must be a current full-time employee at Bridges Charter School
- You must be on site when using the childcare service
- Children must be currently enrolled as students at Bridges Charter School
- A maximum of 20 hours per week can be utilized per staff member
- Employees must submit all paperwork for the children enrolled and maintain sign-in and sign-out records with Extensions
- Children must follow all rules and policies as outlined in the Extensions Handbook

SECTION 10 – EMPLOYEE COMMUNICATIONS

COMMUNICATIONS POLICY

Every employee is responsible for using the Bridges Charter School’s computer system, including, without limitation, its computers, laptops, iPads, tablets, cellular phones, electronic mail (Email) system, telephone, video conferencing, voicemail, facsimile systems and the Internet (“Communications Systems”), properly and in accordance with this policy. Any questions about this policy should be addressed to the Assistant Director.

The Communication Systems are the property of Bridges Charter School and have been provided for use in conducting Bridges Charter School business. All communications and information transmitted by, received from, created, or stored in its Communication Systems are Bridges Charter School records and property of Bridges Charter School. The Communication Systems are to be used for school purposes only. Employees may, however, use Bridges Charter School technology resources for the following incidental personal uses so long as such use does not interfere with the employee’s duties, is not done for pecuniary gain, does not conflict with Bridges Charter School business, and does not violate any Bridges Charter School policies:

- To send and receive necessary and occasional personal communications.
- To use the telephone system for brief and necessary personal calls; and
- To access the Internet for brief personal searches and inquiries during meal periods or other breaks, or outside of work hours, provided that employees adhere to all other usage policies.

No Expectation of Privacy

Bridges Charter School has the right, but not the duty, to monitor any and all of the aspects of its Communication Systems, including, without limitation, reviewing documents created and stored on its Communication Systems, deleting any matter stored in its system (including, without limitation, its Email and word processing systems), monitoring sites visited by employees on the Internet, monitoring chat and news groups, reviewing material downloaded or uploaded by users to the Internet, and reviewing Email and instant messages sent and received by users and/or voicemails. Further, Bridges Charter School may exercise its right to monitor its Communications Systems for any reason and without the permission of any employee. Employee use of Bridges Charter School’s Communication Systems constitutes consent to all the terms and conditions of this policy.

Even if employees use a password to access the Communication Systems (or any aspect thereof), the confidentiality of any message stored in, created, received, or sent from Bridges Charter School’s Communication Systems is not assured. Use of passwords or other security measures does not in any way diminish Bridges Charter School’s right to monitor and access materials on its Communication Systems or create any privacy rights of employees in the messages and files on the system. Any password used by employees must be revealed upon request to Bridges Charter School for any reason that Bridges Charter School, in its discretion, deems appropriate. Further, employees should be aware that deleting any Email messages, voicemails or files would not truly eliminate the messages from the system. All Email messages, voicemails and other files may be stored on a central back-up system in the normal course of data management.

Employees have no expectation of privacy in anything they view, create, store, send or receive on the Communication Systems.

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Approved

Notwithstanding the foregoing, even though Bridges Charter School has the right to retrieve, read and delete any information viewed, created, sent, received or stored on its Communication Systems, Email messages should still be treated as confidential by other employees and accessed only by the intended recipient. Employees are not authorized to retrieve or read any Email messages that are not sent to them or by them. Any exception to this policy must receive the prior approval of the Administration.

Professional Use of Communication Systems Required

Employees are reminded to be courteous to other users of the system and always to conduct themselves in a professional manner. Emails and other text communications, in particular, are sometimes misdirected or forwarded and may be viewed by persons other than the intended recipient. Users should write email communications with no less care, judgment and responsibility than they would use for letters or internal memoranda written on Bridges Charter School letterhead.

Offensive and Inappropriate Material

Bridges Charter School's policy against discrimination and harassment, sexual or otherwise, applies fully to Bridges Charter School's Communication Systems, and any violation of that policy is grounds for discipline up to and including discharge. Therefore, no Email messages should be created, sent, or received if they contain intimidating, hostile, or offensive material concerning race, color, religion, sex, age, national origin, disability or any other classification protected by law. Further, material that is fraudulent, harassing, abusive, embarrassing, sexually explicit, profane, obscene, intimidating, defamatory, unlawful, inappropriate, or offensive (including offensive material concerning sex, race, color, national origin, religion, age, disability, or other characteristic protected by law) may not be downloaded from the Internet or displayed or stored in Bridges Charter School's computers. Employees encountering or receiving this kind of material should immediately report the incident to the Administration.

Bridges Charter School may (but is not required to) use software to identify inappropriate or sexually explicit Internet sites. Such sites may be blocked from access by Bridges Charter School networks. Notwithstanding the foregoing, Bridges Charter School is not responsible for material viewed or downloaded by users from the Internet. The Internet is a worldwide network of computers that contains millions of pages of information. Users are cautioned that many of these pages include offensive, sexually explicit, and inappropriate material. Even innocuous search requests may lead to sites with highly offensive content. In addition, having an email address on the Internet may lead to receipt of unsolicited email containing offensive content. Users accessing the Internet do so at their own risk. Employees who encounter inappropriate or sexually explicit material while browsing on the Internet should immediately disconnect from the site, regardless of whether the site was subject to Bridges Charter School's blocking software.

Solicitations

Bridges Charter School's Communication Systems may not be used to solicit political causes, commercial enterprises, outside organizations, or other non-job-related solicitations. Approval from the Administration is required before anyone can post any information on commercial on-line systems or the Internet.

Confidential Information

Employees may not transmit information over the Internet or through email that is confidential or proprietary. Employees are referred to Bridges Charter School's "Confidential Information" policy, contained herein, for a general description of what

Bridges Charter School Employee Handbook
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Bridges Charter School deems confidential or proprietary. When in doubt, employees must consult their immediate supervisor and obtain approval before transmitting any information that may be considered confidential or proprietary.

Copyrights and Trademarks

Bridges Charter School's Communication Systems may not be used to send (upload) or receive (download) copyrighted materials, trade secrets, proprietary financial information, or similar materials without prior authorization from Administration. Employees, if uncertain about whether certain information is copyrighted, proprietary, or otherwise inappropriate for transfer, should resolve all doubts in favor of not transferring the information and consult a supervisor.

Maintenance and Security of the System

Employees must not deliberately perform acts that waste resources or unfairly monopolize resources to the exclusion of others. These acts include, but are not limited to, sending mass mailings or chain letters, spending excessive amounts of time on the Internet, playing games, streaming video or audio files, engaging in online chat groups, printing excessive copies of documents, or otherwise creating unnecessary network traffic. Because audio, video and picture files require significant storage space, files of this or any other sort may not be downloaded unless they are business-related. In addition, employees should routinely delete outdated or otherwise unnecessary voicemails, Emails and computer files. These deletions will help keep the system running smoothly and effectively, as well as minimize maintenance costs.

To ensure security and to avoid the spread of viruses, employees accessing the Internet through a computer attached to Bridges Charter School's network must do so through an approved Internet firewall. Accessing the Internet directly by modem is strictly prohibited unless the computer you are using is not connected to Bridges Charter School's network.

If you suspect that a virus has been introduced into Bridges Charter School network, notify Director of Daily Operations Administrative Coordinator immediately.

Violations of this Policy

Violations of this policy will be taken seriously and may result in disciplinary action, including possible termination, and civil and criminal liability.

Amendment and Modification of this Policy

Bridges Charter School reserves the right to modify this policy at any time, with or without notice. Bridges Charter School may require employees to acknowledge and comply with a separate Acceptable Use Policy for Internet and Network Resources.

Acknowledgement

Employees acknowledge this policy by signing the receipt of this handbook.

SOCIAL MEDIA POLICY

Bridges Charter School has adopted the following policy with regard to employees' behavior on social networking sites including but not limited to Facebook, Twitter, LinkedIn, Pinterest, Instagram, Snapchat and YouTube. If you wish to use networking protocols or set up a social media site as a part of the educational process, please work with your administrators and technology staff to identify and use a restricted, school-endorsed networking platform. Such sites will be the property of the school who will have unrestricted access to, and control of, such sites.

Bridges Charter School Employee Handbook
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This policy is intended to supplement, not replace, the school's other policies, rules, and standards of conduct. For example, School policies on confidentiality, use of School equipment, professionalism, employee references and background checks, workplace violence, unlawful harassment, and other rules of conduct are not affected by this policy.

You are required to comply with the following rules and guidelines when participating in social media activities that are governed by this policy:

- Comply with the law at all times. Do not post any information or engage in any social media activity that may violate applicable local, state, or federal laws or regulations.
- Do not engage in any discriminatory, harassing, or retaliatory behavior in violation of School policy.
- Respect copyright, fair use, and financial disclosure rules and regulations. Identify all copyrighted or borrowed material with proper citations and/or links.
- Maintain the confidentiality of the school's trade secrets and private or confidential information. Trade secrets may include information regarding the development of systems, processes, products, know-how, and technology. Do not post internal reports, policies, procedures, or other internal business-related confidential communications. This prohibition applies both during and after your employment with the school.
- Do not post confidential information (as defined in this Handbook) about the school, its employees, or its students. Remember that most student information is protected by the Family Educational Rights and Privacy Act, including any and all information that might identify the student. Publicizing student work and accomplishments is permitted only if appropriate consents are obtained.
- While limited and incidental social media activities at work may be tolerated, such social media activities may not interfere with your job duties or responsibilities. Do not use your School-authorized e-mail address to register on social media websites, blogs, or other online tools utilized for personal use.
- Be knowledgeable about and comply with the school's background check procedures.
- Be knowledgeable about and comply with the school's reference policy. Do not provide employment references for current or former employees, regardless of the substance of such comments, without prior approval from the school.
- We encourage you to be fair and courteous to fellow employees, students, parents, vendors, customers, suppliers, or other people who work on behalf of the school. We also encourage you to avoid posting statements, photographs, video, or audio that could be reasonably viewed as malicious, obscene, threatening, or intimidating, that disparage employees, students, parents, vendors, customers, suppliers, or other people who work on behalf of the school, or that might constitute harassment or bullying.
- Make sure you always try to be honest and accurate when posting information or news, and if you make a mistake, correct it quickly. Please do not post any information or rumors that you know to be false about the school, fellow employees, students, parents, vendors, customers, suppliers, people working on behalf of the school, or competitors.
- Never represent yourself as a spokesperson for the school unless authorized to do so. If you publish social media content that may be related to your work or subjects associated with the School, make it clear that you are not speaking on behalf of the School and that your views do not represent those of the School, fellow employees, students, parents,

vendors, customers, suppliers, or other people working on behalf of the School. It is best to use a disclaimer such as “The postings on this site are my own and do not necessarily reflect the views of the school.”

- Never be false or misleading with respect to your professional credentials.
- Do not take any photos, videos, or other media in the workplace or on the School’s premises or at School functions without permission of the school. It is your responsibility to ensure that your posts do not contain any prohibited information, or Confidential Information, including, but not limited to, photos, videos, or other media referencing or relating to student information, even if the student(s) is/are not specifically identified by name but could be easily determined or may be perceived as identifying any student or group of students. Violations may result in disciplinary action, up to and including termination.
- Supervisors who “friend” subordinates on social media accounts (whether personal or School accounts) are responsible for abiding by this policy at all times and immediately reporting any violations of this policy to Executive Director or Director of Daily Operations. Failure to do so may result in disciplinary action, up to and including termination.

Employees are not to initiate “friendships” with students or parents. Employees shall not accept students as friends on any personal social networking sites and are to decline any student-initiated friend requests. Employees must delete any students already on their “friends” list immediately. Employees should also be aware that participation in social media, even in a private setting, may not remain private and posts may become public knowledge and/or reported to the school.

Employees should weigh whether a particular posting puts his/her effectiveness as a school employee at risk. Bridges Charter School encourages employees to post only what they want the world to see. Imagine that students, their parents, or administrators will visit your site as most information is available to the general public even after it is removed from the site. Employees may not discuss students nor post images that include students.

This policy should not be construed, and will not be applied, in a manner that violates employee rights under the National Labor Relations Act.

Employees may not comment on a student's blog or a student’s other social networking commentaries.

Employees may not use trade names, or logos belonging to the School without express written permission of the Administrative Coordinator.

In the event you have any questions about whether a particular social media activity may involve or implicate the school, or may violate this policy, please contact the Administrative Coordinator.

Social media is in a state of constant evolution, and the school recognizes that there will likely be events or issues that are not addressed in these guidelines. Thus, each School employee is responsible for using good judgment and seeking guidance, clarification, or authorization before engaging in social media activities that may implicate this policy.

Failure to comply with Bridges Charter School’s social media policy will result in disciplinary action, up to, and including, immediate termination.

EQUIPMENT POLICY

Bridges Charter School attempts to provide all staff members with the equipment and supplies needed to do their job. Providing equipment is a great expense to the school. It is expected that everyone will protect and care for all equipment and supplies issued to them. Staff members are responsible for the cost of lost, stolen, or broken items issued to them including keys, textbooks, teacher guides, laptops, and any other equipment that may be assigned to them or their classroom if the loss is due to willful misconduct or negligence.

Laptop Computers

Each staff member assigned a laptop for professional use will be charged for any damage, loss or theft to the laptop caused by willful misconduct and/or negligence.

Although issued to an individual employee, all computing devices are considered the personal property of the primary organizational unit to which the receiving employee belongs and shall be returned upon termination of employment with the School, after reassignment of job duties or immediately upon request at any time by an official of the school.

Employees are expected to take all appropriate measures and precautions to prevent the loss, theft, damage and/or unauthorized use of such equipment. Such precautions shall include, but not be limited to the following:

- Keep the computing device in a locked and secure environment when not being used;
- Do not leave the computing device for prolonged periods of time in a vehicle, especially in extreme temperatures.
- Keep food and drinks away from all computing devices and work areas.
- Do not leave the computing device unattended at any time in an unsecured location (e.g., an unlocked empty classroom or office); and
- Keep the computing device in sight at all times while in public places, such as public transportation, airports, restaurants, etc. Should an employee's computing device be lost or stolen, the employee must:
- Immediately report the incident to his/her immediate supervisor and Chief representative; and obtain an official police report documenting the theft or loss; and provide a copy of the police report to his/her immediate supervisor or Executive Director.

If the employee fails to adhere to these procedures, the employee will be held legally and financially responsible to the school for the replacement of such equipment.

The school is under no legal, financial or other obligation to provide a replacement computing device to any employee whose device is lost, stolen or damaged.

The school may add security and other tracking technology to any and all computing devices issued by it and any and all such usage is subject to management review, monitoring and auditing by the school. Other audits may be performed on the usage and internal controls as deemed necessary.

Non-compliance with any policies or procedures will result in appropriate disciplinary action and/or reimbursement of any and all costs to the school if resulting from an employee's willful misconduct.

CELL PHONE POLICY

If you are required to perform business on a cell phone for Bridges Charter School while driving, you must utilize the hands-free option on the cell phone or a headset/earpiece device. Sending, writing, or reading text-based communications on your cell phone while driving a School vehicle or your own vehicle to conduct School business is prohibited. Text based communications include, but are not limited to, text messages, instant messages and email.

Employees whose job responsibilities do not specifically include driving as an essential function, but who use a cell phone for business purposes, whether issued by Bridges Charter School or not, are also expected to abide by the provisions above. Under no circumstances are employees allowed to place themselves or others at risk to fulfill business needs.

Any employee who fails to comply with this policy will be deemed to have engaged in grossly negligent conduct beyond the course and scope of his or her employment. As a result, any employee who is charged with a traffic violation or incurs any other form of liability resulting from a violation of this policy will, to the extent allowed by applicable law, be solely responsible for any such liability.

TELEPHONE CALLS AND TEXTING

While at work and during staff meetings, the employee's undivided attention is expected.

Bridges Charter School expects that cell phones will be turned on a silent/meeting answer mode while employees are on the job, this includes staff meetings and professional development.

CELL PHONE COMPENSATION

Permanent employees with a regular assignment will receive a stipend if they are required to use their personal cell phones for work-related purposes. Employees will receive a monthly cell phone stipend to partially offset the cost of their mobile plan, provided they adhere to company guidelines regarding appropriate usage and data security.

NO SOLICITATION/DISTRIBUTION POLICY

In order to minimize non-work-related activities that could interfere with providing quality education, teamwork, and safety, Bridges Charter School has established the following policy concerning solicitation and the distribution of written materials other than those directly related to the school's business.

Non-employees may not solicit or distribute written materials of any kind at any time on premises that are owned, leased, operated, managed or controlled by Bridges Charter School.

Employees may not solicit other employees during the workday when either the person doing the solicitation or the person being solicited is engaged in or required to be performing work tasks.

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Employees may not distribute written materials of any kind during the workday when either the distributing employee or the employee receiving the materials is engaged in or required to be performing work tasks.

Additionally, distribution of written materials of any kind by Bridges Charter School employees is prohibited at all times in all working areas on school premises.

Employees may solicit other employees when both parties are on non-work time. Employees may distribute written materials in non-work areas during non-work time.

The sole exceptions to this policy are charitable and community activities supported and approved by Bridges Charter School.

School bulletin boards are the only areas where any merchandise or notices may be placed. Such items must meet the guidelines established by the school. The Directors must approve any posting prior to posting.

Bridges Charter School reserves the right to discontinue any solicitation or distribution if the activities become disruptive to employees or the efficient operation of the school's business.

Employee Responsibility

If you have a need to solicit and/or distribute materials on school premises, it must be in compliance with this policy. If you have questions, talk with the Administrative Coordinator or Administration. If solicitation or distribution is conducted within the parameters of this policy, the manner of activities must not harass or intimidate other employees. If you are subjected to such behavior at any time, report the activity to your supervisor. If solicitation or distribution occurs while you are working, report the activity to the Administrative Coordinator or Administration.

NEPOTISM POLICY

Bridges Charter School permits the employment of qualified relatives of employees, of the employee's household or immediate family as long as such employment does not, in the opinion of Bridges Charter School, create actual conflicts of interest. For purposes of this policy, "qualified relative" is defined as a spouse, child, parent, sibling, grandparent, grandchild, aunt, uncle, first cousin, corresponding in-law, "step" relation, or any member of the employee's household. Bridges Charter School will use sound judgment in the placement of related employees in accordance with the following guidelines:

Related employees may have no influence over the wages, hours, benefits, career progress and other terms and conditions of the other related staff members.

The Directors must approve any exceptions to this policy.

BUILDING SECURITY/SCHOOL KEYS

All employees who are issued keys to the office and classrooms are responsible for their safekeeping. These employees will sign a BUILDING KEY DISBURSEMENT FORM upon receiving the key.

You will be assigned all appropriate building keys needed to conduct your daily job responsibilities. You are responsible for all keys. Duplication of any school key is not allowed and strictly prohibited. It is against School policy to loan or distribute

Bridges Charter School Employee Handbook
Approved

your assigned keys to another employee or non-employee of the school. If your school keys are lost, misplaced, destroyed, or stolen, you must report it immediately to the Administrative Coordinator.

The last employee, or a designated employee, who leaves the office and /or the school site at the end of the business day assumes the responsibility to ensure that all doors are securely locked, the alarm system is armed, thermostats are set on appropriate evening and/or weekend setting, and all appliances and lights are turned off with exception of the lights normally left on for security purposes. Employees are not allowed on school property before or after hours without prior authorization.

INTERNAL INVESTIGATIONS & SEARCHES

From time to time Bridges Charter School may conduct internal investigations pertaining to security, auditing, or work-related matters. Employees are required to cooperate fully with and assist in these investigations if required to do so.

Whenever necessary, at Bridges Charter School's discretion, employees' work areas (i.e. desks, file cabinets, lockers, etc.) and personal belongings (i.e. briefcases, handbags, etc.) may be subject to a search without notice. Employees are required to cooperate. Because even a routine search for Bridges Charter School property might result in the discovery of an employee's personal possessions, all employees are encouraged to refrain from bringing into the workplace any item of personal property that they do not wish to reveal to Bridges Charter School. Bridges Charter School will generally try to obtain an employee's consent before conducting a search of work areas and personal belongings, but it may not always be able to do so. Employees have no expectation of privacy in their work areas.

VIOLENCE IN THE WORKPLACE

Bridges Charter School has adopted a policy prohibiting workplace violence. Consistent with this policy, acts or threats of physical violence, including intimidation, harassment, bullying, and/or coercion, which involve or affect Bridges Charter School, or which occur on Bridges Charter School property will not be tolerated.

Per Labor Code section 6401.9, "workplace violence" is defined as any act of violence or threat of violence that occurs in a place of employment. This includes, but is not limited to, the following:

- The threat or use of physical force against an employee that results in, or has a high likelihood of resulting in, injury, psychological trauma, or stress, regardless of whether the employee sustains an injury.
- An incident involving a threat or use of a firearm or other dangerous weapon, including the use of common objects as weapons, regardless of whether the employee sustains an injury.
- The four types of workplace violence defined in Labor Code section 6401.9.

Below are the four types of defined violence:

Type 1 violence - Workplace violence committed by a person who has no legitimate business at the worksite and includes violent acts by anyone who enters the workplace or approaches employees with the intent to commit a crime.

Type 2 violence - Workplace violence directed at employees by customers, clients, patients, students, inmates, or visitors.

Type 3 violence - Workplace violence against an employee by a present or former employee, supervisor, or manager.

Type 4 violence - Workplace violence committed in the workplace by a person who does not work there, but has or is known to have had a personal relationship with an employee

Note: "Workplace violence" does not include lawful acts of self-defense or defense of others.

Specific examples of conduct, which may be considered threats or acts of violence, include, but are not limited to, the following:

- Hitting or shoving an individual
- Threatening an individual or his/her family, friends, associates, or property with harm
- Intentional destruction or threatening to destroy Bridges Charter School property
- Making harassing or threatening phone calls
- Harassing surveillance or stalking (following or watching someone)
- Unauthorized possession or inappropriate use of firearms or weapons

Bridges Charter School's prohibition against threats and acts of violence applies to all people involved in Bridges Charter School's operation, including but not limited to all personnel, contract, unpaid interns, volunteers and temporary workers and anyone else, including parents on Bridges Charter School property. Violations of this policy by any individual on Bridges Charter School property will lead to disciplinary action, up to and including termination and/or legal action as appropriate. All employees are encouraged to report incidents of threats or acts of physical violence of which they are aware to their supervisors or to the Director, Director of Daily Operation or the Administrative Coordinator.

If an employee becomes aware of an imminent act of violence, a threat of imminent violence, or actual violence, emergency assistance must be sought immediately. In such situations, the employee should contact the law enforcement authorities by dialing 911. Immediately after contacting the law enforcement authorities, the employee must report the incident to the Executive Director or Director of Daily Operations or the Administrative Coordinator.

Employees should immediately inform their supervisor or Administrative Coordinator about any workplace security hazards. If these individuals are not available, the employee should immediately inform any other supervisor so that appropriate action can be taken.

There will be no retaliation against any employee who brings a complaint in good faith under the Violence in the Workplace Policy or who honestly assists in investigating such a complaint, even if the investigation produces insufficient evidence that there has been a violation, or if the charges cannot be proven. However, disciplinary action may be taken against employees who, in bad faith, make false or frivolous accusations.

In certain circumstances, the School may seek a workplace violence restraining order on behalf of one or more employees in furtherance of its commitment to providing a workplace that is free from acts of violence or threats of violence.

All staff will be provided annual training on the Workplace Violence Prevention Plan to include how to report concerns.

Bridges Charter School Employee Handbook
Approved

A full copy of the Work Place Violence Prevention Plan is included

SECTION 11 – STANDARDS OF CONDUCT

BRIDGES CHARTER SCHOOL Progressive Discipline Policy

Absent serious misconduct, the school shall utilize a discipline process which shall include the following progression as applicable: verbal warning/conference memo; written reprimand; suspension without pay; and release/termination. In determining the appropriate level of disciplinary action, the school shall consider the nature of the employee’s prior misconduct, prior disciplinary action taken against the employee, and the employee’s response to the disciplinary action.

Although employment for certain employees at the school is “at-will,” meaning that either the employee or the school may terminate the employment relationship at any time, with or without cause or advance notice, the school shall utilize progressive discipline for at-will employees when appropriate, and for employees who have greater employment rights by contract.

- a. **Verbal Warning(s)/Conference Memo(s):** A verbal warning may result in a post- conference summary memorandum.
- b. **Written Reprimand(s):** Unless conduct warrants a reprimand in the first instance, a written reprimand shall not be used unless the employee has been verbally warned about similar actions within the last three (3) school years. The School, in its discretion, may also issue a performance improvement plan (“PIP”) concurrent with the written reprimand.
- c. **Suspension without Pay:** The School, in its discretion, may choose to place the employee on unpaid suspension in lieu of releasing an at-will employee, or terminating an employee for cause. However, placement on unpaid suspension does not bar the School from releasing or terminating the employee should disciplinary issues continue. The school, in its discretion, may also issue a PIP concurrent with the suspension.
- d. **Release from At-Will Employment/Termination for Cause:** Release from at-will employment or termination for cause shall be the final step of progressive discipline and shall generally be used when prior steps of progressive discipline have failed, or unless the basis for the release/termination constitutes misconduct or significant unsatisfactory job performance.

Employees shall have the right to have a written response attached to any of the aforementioned disciplinary documents which shall be retained in the employee’s personnel file.

Bridges Charter School Employee Handbook
Approved

The school reserves the right in all instances to determine the appropriate level of disciplinary action, where progressive steps may not always be taken. Neither this policy nor any action taken or not taken by the school in relation to employee discipline alters the at-will nature of relationship at the school.

PERSONAL APPEARANCE/STANDARDS OF DRESS

The Board of Directors believes that teachers and other Bridges Charter School staff serve as role models. They should therefore maintain professional standards of dress and grooming. Just as overall attitude and instructional competency contribute to a productive learning environment, so do appropriate dress and grooming.

Each employee must be neatly groomed and wear clothing that is professional and appropriate for the employee's position. The administration will inform you of any special clothing requirements. Employees will not be permitted to wear clothing or otherwise present an appearance that may cause disruption, be taken as offensive or reduce productivity. If you are assigned a school uniform, your uniform must be clean and presentable when you report to work.

DISCIPLINARY PHYSICAL CONTACT WITH STUDENTS

It is the policy of Bridges Charter School that no teacher or other staff member will use corporal punishment against a student. This prohibition includes spanking, slapping, pinching, hitting, tying, taping, or the use of any other physical force as retaliation or correction for inappropriate behavior.

STAFF-STUDENT INTERACTIONS

While the use of appropriate touching is part of daily life and is important for student development, teachers and other staff members must ensure that they do not exceed appropriate behavior. If a child or other staff member specifically requests that he or she not be touched, then that request must be honored without question.

Boundaries Defined

For the purposes of this policy the term "boundaries" is defined as acceptable professional behavior by staff members while interacting with a student. Trespassing beyond the boundaries of a student-teacher relationship is deemed an abuse of power and a betrayal of public trust.

Acceptable and Unacceptable Behaviors

Some activities may seem innocent from a staff member's perspective but may be perceived as flirtation or sexual insinuation from a student or parental point of view. The purpose of the following lists of unacceptable and acceptable behaviors is not to restrain innocent, positive relationships between staff and students, but to prevent relationships that could lead to or may be perceived as inappropriate, or sexual misconduct, or "grooming." Grooming is defined as an act or series of acts by a sexual predator to gain physical and/or emotional control by gaining trust (of staff and/or family and a minor) and desensitizing the minor to various forms of touching and other intimate interaction.

Staff members must understand their own responsibilities for ensuring that they do not cross the boundaries as written in this policy. Violations could subject the teacher or staff member to discipline up to and including termination. *Disagreeing with the wording or intent of these established boundaries will be considered irrelevant for any required disciplinary purposes.* Thus, it is critical that all employees study this policy thoroughly and apply their spirit and intent in their daily activities.

Unacceptable Behaviors

These lists (and any subsequent lists) are not meant to be all-inclusive, but rather, illustrative of the types of behavior we intend to address by this policy.

- Giving gifts to an individual student that are of a personal and intimate nature (including photographs); or items such as money, food, outings, electronics, etc. without the written pre-approval of the Executive Director or Director of Daily Operations, along with the rationale, therefore.
- Kissing of ANY kind
- Massage [Note: Prohibited in athletics unless provided by massage therapist or other certified professional in an open public location. Coaches may not perform massage or rub-down. Permitted in special education only as instructed under an IEP or 504 plan.]
- Full frontal or rear hugs and lengthy embraces
- Sitting students on one's lap (grades 3 and above)
- Touching buttocks, thighs, chest or genital area
- Wrestling with students or other staff members except in the context of a formal wrestling program
- Tickling or piggyback rides
- Any form of sexual contact
- Any type of unnecessary physical contact with a student in a private situation
- Intentionally being alone with a student away from school
- Furnishing alcohol, tobacco products, or drugs or failing to report knowledge of such
- "Dating" or "going out with" a student
- Remarks about physical attributes or physiological development of anyone. This includes comments such as "Looking fine!" or "Check out that [body part]."
- Taking photographs or videos of students for personal use or posting online
- Undressing in front of a student
- Leaving campus alone with a student for lunch

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- Sharing a bed, mat, or sleeping bag with a student
- Making, or participating in, sexually inappropriate comments
- Sexual jokes, or jokes/comments with sexual overtones or double-entendres
- Seeking emotional involvement (which can include intimate attachment) with a student beyond the normative care and concern required of an educator.
- Listening to or telling stories that are sexually oriented
- Discussing your personal troubles or intimate issues with a student
- Becoming involved with a student so that a reasonable person may suspect inappropriate behavior
- Giving students a ride to/from school or school activities without the express, advance written permission of the Executive Director or Director of Daily Operations and the student's parent or legal guardian
- Being alone in a room with a student at school with the door closed and/or windows blocked from view
- Allowing students at your home and/or rooms within your home without signed parental permission for a pre-planned and pre-communicated educational activity which must include another educator, parent, or designated school volunteer
- Staff mirroring the immature behavior of minors
- Sending emails, text messages, social media responses, making phone calls, or sending notes or letters to students if the content is not about school activities. Communication via private social media accounts is not acceptable.

Acceptable Behaviors

- Pats on the shoulder or back
- Handshakes
- "High-fives" and hand slapping
- When age appropriate, touching face to check temperature, wiping away a tear, remove hair from face, or other similar types of contact
- Placing TK through second grade students on one's lap for purposes of comforting the child for a short duration only
- Holding hands while walking with small children or children with significant disabilities
- Assisting with toileting of small or disabled children in view of another staff member

- Touch required under an IEP or 504 Plan
- Reasonable restraint of a violent person to protect self, others, or property
- Obtaining formal written pre-approval from the Executive Director or Daily Operations or to take students off school property for activities such as field trips or competitions, including parent's written permission and waiver form for any sponsored after-school activity whether on or off campus
- Emails, text-messages, phone conversations, and other communications to and with students, if permitted, must be professional and pertain to school activities or classes (communication should be initiated via transparent [non-private] school-based technology and equipment)
- Keeping the door wide open when alone with a student
- Keeping reasonable and appropriate space between you and the student
- Stopping and correcting students if they cross your own personal boundaries, including touching legs, or buttocks, frontal hugs, kissing, or caressing
- Keeping administration informed when a significant issue develops about a student, such as a change in demeanor or uncharacteristic behavior
- Keeping after-class discussions with a professional and brief
- Immediately asking for advice from senior staff or administration if you find yourself in a difficult situation related to boundaries
- Involving your supervisor in discussion about boundaries situations that have the potential to become more severe (including but not limited to grooming or other red flag behaviors observed in colleagues, written material that is disturbing, or a student's fixation on an adult)
- Making detailed notes about an incident that in your best judgement could evolve into a more serious situation later
- Recognizing the responsibility to stop Unacceptable Behaviors of students and/or coworkers
- Asking another staff member to be present, or within close supervisory distance, when you must be alone with a student after regular school hours
- Prioritizing professional behavior during all moments of student contact
- *Asking yourself if any of your actions, which are contrary to these provisions, are worth sacrificing your job and career.*

This policy does not prevent: 1) touching a student for the purpose of guiding them along a physical path; 2) helping them up after a fall; or 3) engaging in a rescue or the application of Cardiopulmonary Resuscitation (CPR) or other emergency first-aid. Nor does it prohibit the use of reasonable force and touching in self-defense or in the defense of another. Restraining a child who is trying to engage in violent or inappropriate behavior is also allowed. Only such force as necessary to defend one's self, another person, or the child or to protect property is legally permitted. Excessive force is prohibited.

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Boundaries Reporting

When any staff member, parent, or student becomes aware of a staff member (or volunteer, guest, vendor) having crossed the boundaries specified in this policy, or has a strong suspicion of misconduct, he or she must report the suspicion to the Executive Director or Director of Daily Operations promptly. Reasonable suspicion means something perceived in spite of inconclusive or slight evidence. It is based on facts that would lead a reasonable person to believe the conduct occurred. Prompt reporting is essential to protect students, the suspected staff member, any witnesses, and the school as a whole. Employees must also report to the administration any awareness of, or concern about, student behavior that crosses boundaries, or any situation in which a student appears to be at risk for sexual abuse.

Boundaries Reporting

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Investigating

Administration will promptly investigate and document the investigation of any allegation of sexual misconduct or inappropriate behavior by a staff member, using such support staff or outside assistance, as he or she deems necessary and appropriate under the circumstances. Throughout this fact-finding process, the investigating administrator, and all others privy to the investigation, shall protect the privacy interests of any affected student(s) and/or staff member(s) including any potential witnesses, as much as possible. The investigating administrator shall promptly notify the Governing Board in closed session of the existence and status of any investigations. Upon completion of any such investigations, the Administration shall report to the Governing Board any conclusions reached. The investigating administrator shall consult with legal counsel, as appropriate, prior to, during, and after conducting any investigation.

Consequences

Staff members who have violated this policy will be subject to appropriate disciplinary action, and where appropriate, will be reported to authorities for potential legal action.

CUSTOMER & PUBLIC RELATIONS

The school's image in front of students, parents (i.e. our "customers") and the general public is critical to our success. All employees are expected to be prompt, polite, courteous and attentive to our customers and the public. It is possible an employee may come into contact with a dissatisfied or hostile individual based on the nature of the employee's work. If this happens, you should immediately notify your supervisor or the Administrative Coordinator. We will absolutely not tolerate conduct toward our customers or the general public that might be interpreted as unlawful discrimination or harassment. If you witness conduct in violation of this policy, you should immediately bring it to the attention of your supervisor or the Directors.

PROHIBITED CONDUCT

The following is a list of conduct that is prohibited and will not be tolerated by the school. It is not an all-inclusive list, but rather a list designed to give examples of the types of conduct prohibited by the school.

- Falsification of employment records, employment information, or other School records.
- Recording the work time of another employee or allowing any other employee to record your work time, or allowing falsification of any timecard, either your own or another's.
- Theft, deliberate or careless damage or loss of any School property or the property of any employee or customer.
- Provoking a fight or fighting during working hours or on School property.
- Participating in horseplay or practical jokes on School time or on School premises where such conduct might be a safety risk or might be interpreted as offensive.
- Carrying firearms or any other dangerous weapons on School premises at any time or while acting on behalf of the school.
- Violation of the Substance and Alcohol policy.
- Insubordination, including but not limited to, failure or refusal to obey the orders or instructions of a supervisor or member of management, or the use of abusive or threatening or abusive language toward a supervisor or member of management.
- Unreported absence on scheduled workdays unless otherwise excused.
- Excessive tardiness or absenteeism unless otherwise excused.
- Unauthorized use of school equipment, time, materials, facilities, or the school's name.
- Sleeping or malingering on the job. Failure to observe working schedules, including the required rest and meal periods.
- Soliciting other employees for membership, funds, or other similar activity in connection with any outside organization during your working time or the working time of the employee(s) solicited.
- Distributing unauthorized literature or any written or printed material during working time or in work areas. ("Working time" does not include your meal and break periods.)
- Failure to timely notify your supervisor when you are unable to report to work.
- Failure of an employee to obtain permission to leave work for any reason during normal working hours.
- Abuse of Sick Leave

- Violation of the Acceptable Use Policy.
- Failure to provide a physician's certificate when requested or required to do so.
- Breaching Confidentiality.
- Making derogatory racial, ethnic, religious or sexual remarks or gestures; any violation of the Harassment and/or Equal Employment Opportunity policy; or using profane or abusive language at any time on School premises or during working hours.
- Violation of any safety, health, security or School rule.
- Negligence or other conduct leads to the endangerment of harm of a child or children.
- Working overtime without authorization or refusing to work assigned overtime.
- Unsatisfactory job performance.
- Willfully or maliciously making false statements regarding any co-worker or submitting a complaint known to be false.

CONFIDENTIAL INFORMATION

You may, during the course of your duties, be advised of certain confidential business matters and affairs of the school regarding its business practices, students, suppliers and employees. Your duties may also place you in a position of trust and confidence with respect to certain trade secrets and other proprietary information relating to the business of the school and not generally known to the public or competitors. Such proprietary information includes student information, competitive strategies, marketing plans, personnel information and financial information. You shall not, either during your employment with the school or any time in the future, directly or indirectly:

Disclose or furnish, directly or indirectly, to any other person, firm, agency, corporation, client, business, or enterprise, any confidential information acquired during your employment.

- Individually or in conjunction with any other person, firm, agency, School, client, business, or corporation, employ or cause to be employed any confidential information in any manner whatsoever, except in furtherance of the business of the school;
- Without the written consent of the school, publish, deliver, or commit to being published or delivered, any copies, abstracts, or summaries of any files, records, documents, drawings, specifications, lists, equipment and similar items relating to the business of the school, except to the extent required in the ordinary course of your duties.

Upon termination of employment, employees are required to immediately return to the school all property of the school in as good a condition as when received (normal wear and tear excepted) including, but not limited to, all files, records, documents, drawings, specifications, lists, equipment and supplies, promotional materials, and similar items relating to the business of the school.

Although some written and electronic materials owned by the school may be considered to be public records, employees must refer any person seeking school records or information to the Administrative Coordinator for handling.

Failure to comply with this policy may result in disciplinary action, up to and including termination.

CONFLICTS OF INTEREST

All employees must avoid situations that result in actual or even potential conflicts of interest. Personal, social and economic relationships with competitors, suppliers, customers, parents, or co-employees that may impair an employee's ability to exercise good judgment on behalf of the school or which give the appearance of such impairment create an actual or potential conflict of interest.

If you have any questions whether an action or proposed course of conduct would create a conflict of interest, you should immediately contact the Administration to obtain advice on this issue. A violation of this policy will result in immediate and appropriate discipline, up to and including immediate termination.

****It is considered a conflict of interest for a staff member to provide tutoring or support services for a fee to any student enrolled at Bridges Charter School.**

Outside Employment

If you are a full-time employee we expect that you will devote your professional effort to your position at Bridges Charter School. If you wish to participate in outside work activities, you are required to obtain written approval from Administration prior to starting those activities.

Approval will be granted unless the activity conflicts with Bridges Charter School's interests. In general, outside work activities are not allowed when they:

- Prevent you from performing work for which you are employed at Bridges Charter School.
- Involve organizations that are doing or seek to do business with Bridges Charter School including actual or potential vendors.
- Violate provisions of law or Bridges Charter School policies or rules.
- When the employee is on medical leave (FMLA/CFRA/PDL or any other medical leave).

Your obligations to Bridges Charter School must be given priority. Full-time employees are hired and continue employment with the understanding that Bridges Charter School is their primary employer and that other employment, commercial involvement or volunteer activity that is in conflict with the business interests of the school is strictly prohibited.

EXPENSE REIMBURSEMENT POLICY

Bridges Charter School expects employees to act responsibly and professionally when incurring and submitting expenses. The organization will reimburse employees for reasonable expenses on pre-approved business. This includes, for example, travel fares, accommodation, meals, tips, telephone and fax charges, and purchases made on behalf of the organization.

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Bridges Charter School does not pay for local travel to and from the office (regular commute). If employees use their vehicles for business travel, mileage will be reimbursed as per the IRS current mileage rates and for appropriate parking fees. Bridges Charter School will not be responsible for fuel, maintenance, traffic or parking violations.

General guidelines

- Original receipts are required for reimbursement of all expenses.

These expenses include:

- Original boarding passes for airplane / train travel
- Credit card receipts
- Detailed merchant receipts

Receipts must be accompanied by a summary which outlines:

- The nature of the expense
- The name and titles of the individuals involved
- The purpose for the expense

Expense summaries must be submitted with receipts and approved by the Executive Director or Director of Daily Operations. All expenses and summaries must be submitted within 30 days to the Administrative Coordinator for payment.

Travel guidelines

Employees are required to fly coach class with the lowest available airfare for non-stop travel.

If a car rental is required, employees are requested to rent midsize or compact vehicles. Employees will be reimbursed for the fuel costs associated with renting a vehicle.

Employees will be reimbursed for reasonable hotel accommodation. Discounted room rates should be requested at the time of room booking.

For work-related trips, employees will be eligible for reimbursement of actual expenses based on current state reimbursement standards. Reimbursements will not be paid where other meal arrangements are provided. For example, a luncheon included with an event.

The following list includes examples of non-reimbursable expenses:

- Personal travel insurance
- Personal reading materials
- Childcare

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- Toiletries, cosmetics, or grooming products
- Expenses incurred by spouses, children, or relatives
- In-room movies or video games
- Sporting activities, shows, etc.
- Alcohol with meals

SECTION 12 – SAFETY

SUBSTANCE AND ALCOHOL POLICY

It is the intent of Bridges Charter School to promote a safe, healthy and productive work environment for all employees. The school recognizes that the illegal and/or excessive use of drugs and/or alcohol is not conducive to safe working conditions, employees' health, efficient operations or School success.

For purposes of this policy, “illegal drugs” includes, but is not limited to, substances that are prohibited by law (such as cocaine, heroin, etc.), controlled substances, marijuana (including medicinal marijuana and marijuana vaping or other recreational marijuana use), and prescription drugs (if they are not prescribed for the person using them and/or not being used as prescribed). “Drug paraphernalia” means any accessory for the use, possession, manufacture, distribution, dispensation, purchase, or sale of illegal drugs. “Under the influence” means that the employee is affected by alcohol, prescription medication that impairs cognitive or physical functions, and/or illegal drugs in any detectable manner.

The school complies with all Federal and State regulations regarding drug use while on the job. This policy prohibits the following:

- Use, possession, purchase, or offer for sale of illegal drugs, drug paraphernalia or alcohol during working hours, including meal and break periods, or in the presence of pupils.
- Use, possession, purchase, or offer for sale of illegal drugs, drug paraphernalia, or alcohol on School property at any time.
- Use, possession, purchase, or offer for sale of illegal drugs, drug paraphernalia, or alcohol while attending a school function or event.
- Storing alcohol (if unauthorized), illegal drugs, or drug paraphernalia in a locker, desk, automobile, or other repository on the school's premises.
- Refusing to submit to an inspection or testing when requested by administration.

- Being under the influence of illegal drugs, prescription medication that impairs cognitive or physical functions and/or alcohol during working hours, while on the school's premises and/or attending a school function or event.
- Conviction under any criminal drug statute for a violation occurring in the workplace, including failure to notify the school in writing of employee's conviction for a violation of a criminal drug statute occurring in the workplace no later than 5 calendar days after such conviction; or
- Failure to keep all prescribed medicine in its original container.

Employees taking physician-prescribed medications, which impairs the employee's job performance, (including medical prescribed marijuana) should not report to work. In addition, if you are required to take any kind of prescription or nonprescription medication that will affect your ability to perform your job, you are required to report this to Administration who will determine if it is necessary to temporarily place you on another assignment or take other action as appropriate to protect your safety and the safety of other employees and students.

Employees taking physician-prescribed medication which will not impair their job performance may be required to present a statement from the prescribing physician to the employee's supervisor indicating the duration of the prescription and stating that the use of the prescription will not impair the employee's ability to perform his or her specific job duties. This policy does not require or request the prescribing physician or the employee to identify any prescription drug or the medical condition for which it is prescribed. No employee shall use or have in his or her possession on the school premises any prescription medication other than medications currently prescribed by a physician for the employee.

This policy will not be construed to prohibit the use of alcohol at social or business functions sponsored by the school where alcohol is served or while entertaining clients and prospective clients of the school. However, employees must remember their obligation to conduct themselves appropriately at all times while at School-sponsored functions or while representing the school.

The school may at times conduct unannounced searches of School property for alcohol, illegal drugs, drug paraphernalia, and/or unauthorized controlled substances or to ensure compliance with any other School-related policy. This may include desks, storage areas and rooms normally used to store employees' personal property. As a result, employees do not have an expectation of privacy in this regard.

Violation of this Drug and Alcohol Policy may result in disciplinary action, up to and including termination, at the school's sole discretion.

Employees should be aware that participation in a rehabilitation program will not necessarily prevent the imposition of disciplinary action, including termination, for violation of this policy. Employees who undergo voluntary counseling or treatment and who continue to work, if any, must meet all established standards of conduct and job performance.

Compliance with this Drug and Alcohol Policy is a condition of employment at the school. Failure or refusal of an employee to cooperate fully, sign any required document, submit to any inspection, or follow any prescribed course of substance abuse treatment will result in discipline, up to and including termination.

Because the use, sale, purchase, possession, or furnishing of an illegally obtained substance is a violation of the law, the school may report such illegal drug activities to an appropriate law enforcement agency.

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SMOKING

All School buildings and facilities are non-smoking facilities. This includes nicotine and non-nicotine cigarettes including (herbal cigarettes) as well as e-cigarettes, and vaping. Smoking is prohibited within 20 feet of a school building and within 25 feet of a school playground.

SECURITY

All employees are responsible for helping to maintain a secure workplace. Be aware of people loitering for no apparent reason. All staff are expected to question any unknown person seen in the workplace who does not have a visitor's pass. If you are leaving late at night or are in any other situation that presents security concerns or where you do not feel comfortable, please seek the assistance of the Custodian, other employees push a panic button in a classroom or call 911. Report any suspicious persons or activities to the office. Never attempt to force an individual to leave the workplace if s/he is uncooperative. Immediately contact your supervisor or school administrators for assistance or call 911. Secure your desk or work area at the end of the day or when called away from your work area for an extended length of time, and do not leave valuable and/or personal articles that may be accessible in or around your work area.

PARKED VEHICLES

Employees are responsible for their own parked vehicles and personal possessions within while parked on Bridges Charter School property. Vehicle break-ins are on the rise throughout California. Be cautious: keep school property and/or personal possessions out of sight and lock your car. Insuring your vehicle and personal property against loss and damage is recommended for your protection.

USE OF PERSONAL VEHICLE FOR SCHOOL BUSINESS

Personal vehicles used by employees to conduct Bridges Charter School business must be insured by the employee's personal automobile insurer. Bridges Charter School's liability insurance applies on a secondary basis if the underlying personal auto insurance is insufficient. In no event does Bridges Charter School's automobile liability insurance coverage pay for damage to the employee's vehicle. Insuring your vehicle against collision damage is recommended for your protection.

PERSONAL PROPERTY

Bridges Charter School cannot be responsible and will assume no liability for any loss or damage to employee personal property resulting from theft, fire, or any other cause on Bridges Charter School's premises, including the parking area, or away from school property while on school business.

SAFETY POLICY

Bridges Charter School is firmly committed to maintaining a safe and healthy working environment. All employees of the school are expected to be safety conscious on the job at all times. All unsafe conditions or hazards should be corrected immediately. Report all unsafe conditions or hazards to your supervisor or the Administrative Coordinator immediately, even if you believe you have corrected the problem. If you suspect a concealed danger is present on School premises, or in a product, facility, piece of equipment, process or business practice for which the school is responsible, bring it to the attention of your supervisor or Administration immediately. Supervisors should arrange for the correction of any unsafe condition or concealed danger immediately and immediately contact the Administration regarding the problem.

All workplace injuries and illnesses must be immediately reported to your supervisor and the Administrative Coordinator.

Bridges Charter School has in place a written Injury and Illness Prevention Program as required by law. It is located in the main office for review.

ERGONOMICS

Bridges Charter School has invested in providing a work environment that is safe for all employees. To lessen the risk of ergonomic hazards, the School will make necessary adjustments to an individual's workstation, educate employees on ergonomic safety, and modify processes when deemed necessary to ensure the well-being and safety of our employees. You should report any ergonomic concerns to the Administration.

CHEMICAL EXPOSURE WARNING

Employees should be aware that work areas might contain chemicals known to the State of California to cause cancer or to cause birth defects or other reproductive harm. If you have any questions or concerns about possible chemical exposure in your work area, contact the Administrative Coordinator. Bridges Charter School uses chemicals in some of its operations. Employees should receive training and be familiar with the handling, use, storage and control measures relating to these substances if they will use or likely be exposed to them. Safety Data Sheets (SDS) are available for inspection. Employees must follow all labeling requirements.

SECTION 13 – TERMINATION

VOLUNTARY TERMINATION

~~Bridges Charter School will consider an employee to have voluntarily terminated his or her employment if the employee does any of the following: (1) elects to resign from Bridges Charter School; (2) fails to return from an approved leave of absence on the date specified without notifying the school for the need for continued leave including failure to communicate with the school; or (3) fails to report for work without notice to Bridges Charter School for three consecutive work days. Bridges Charter School requests that employees provide at least two weeks' written notice of a voluntary termination. All Bridges Charter School property must be returned immediately upon terminating employment. Bridges Charter School retains the~~

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~~right to accept resignation immediately and pay the amount of straight time compensation an employee would have earned in lieu of further performance.~~

Bridges Charter School will consider an employee to have voluntarily terminated employment if the employee does any of the following:

Submits a resignation from employment with Bridges Charter School

1. Fails to return to work on the scheduled return date following an approved leave of absence and does not notify the School of the need for additional leave or otherwise communicate with the School; or
2. Fails to report for work and fails to notify Bridges Charter School for three (3) consecutive scheduled workdays, which may be considered job abandonment and treated as a voluntary resignation.

Bridges Charter School requests that employees provide at least **two weeks' written notice** when resigning. However, the School reserves the right to determine the employee's last day of work and may accept a resignation effective immediately. All Bridges Charter School property must be returned immediately upon separation from employment.

If the School elects to release an employee earlier than the employee's proposed resignation date, the School may choose to pay the employee for the remainder of the notice period at the employee's regular straight-time rate in lieu of requiring the employee to continue working.

INVOLUNTARY TERMINATION

~~An employee may be terminated involuntarily for, among other reasons, poor performance, misconduct or other violations of Bridges Charter School's Rules of Conduct as set forth herein. Notwithstanding the foregoing, or anything else contained in this handbook, pursuant to its at-will policy, Bridges Charter School reserves the right to terminate an employee at any time, with or without advance notice and with or without cause.~~

Bridges Charter School may terminate employment involuntarily for reasons including, but not limited to, unsatisfactory job performance, misconduct, violation of Bridges Charter School's Rules of Conduct, or other legitimate business reasons.

Employment with Bridges Charter School is **at-will**. This means that either the employee or Bridges Charter School may terminate the employment relationship at any time, with or without cause and with or without advance notice, subject only to applicable state or federal law.

Nothing in this handbook, nor any oral or written statements by a supervisor, manager, or other representative of the School, shall be interpreted as creating a contract of employment or altering the at-will nature of the employment relationship. Only a written agreement signed by the Executive Director and the employee may modify the at-will status of employment.

EXIT INTERVIEWS

Employees who leave employment at Bridges Charter School may be asked to take part in an exit interview with the Directors to communicate their challenges and growth while employed at Bridges Charter School. Information shared during an exit interview will be treated as confidential to the extent possible.

VERIFICATION AND REFERENCE POLICY

All requests for employment verification, references or personal information verification or disclosures must be directed to the Administrative Coordinator. Only the Administration and the Administrative Coordinator are authorized to provide verifications or references, or disclose personal information, pertaining to current or former employees.

With respect to verification requests, Bridges Charter School will disclose only the dates of employment, and the title of the last position held. Bridges Charter School will verify or disclose additional information about the employee only if the employee provides written authorization for Bridges Charter School to provide the information. However, Bridges Charter School will provide information about current or former employees as required by law or court order.

APPENDIX A--HARASSMENT COMPLAINT FORM

It is the policy of the school that all of its employees be free from harassment. This form is provided for you to report what you believe to be harassment, so that the School may investigate and take appropriate disciplinary or other action when the facts show that there has been harassment.

If you are an employee of the School, you may file this form with the Executive Director or Board President.

Please review the School's policies concerning harassment for a definition of harassment and a description of the types of conduct that are considered to be harassment.

Bridges Charter School will undertake every effort to handle the investigation of your complaint in a confidential manner. In that regard, the School will disclose the contents of your complaint only to those persons having a need to know. For example, to conduct its investigation, the School will need to disclose portions of your factual allegations to potential witnesses, including anyone you have identified as having knowledge of the facts on which you are basing your complaint, as well as the alleged harasser.

In signing this form below, you authorize the School to disclose to others the information you have provided herein, and information you may provide in the future. Please note that the more detailed information you provide, the more likely it is that the School will be able to address your complaint to your satisfaction.

Charges of harassment are taken very seriously by the School both because of the harm caused to the person harassed, and because of the potential sanctions that may be taken against the harasser. It is therefore very important that you report the facts as accurately and completely as possible and that you cooperate fully with the person or persons designated to investigate your complaint.

Your Name: _____ Date: _____

Date of Alleged Incident(s): _____

Name of Person(s) you believe sexually harassed you or someone else: _____

List any witnesses that were present: _____

Where did the incident(s) occur? _____

Please describe the events or conduct that are the basis of your complaint by providing as much factual detail as possible (i.e. specific statements; what, if any, physical contact was involved; any verbal statements; what did you do to avoid the situation, etc.) (Attach additional pages, if needed):

I acknowledge that I have read and that I understand the above statements. I hereby authorize the School to disclose the information I have provided as it finds necessary in pursuing its investigation.

I hereby certify that the information I have provided in this complaint is true and correct and complete to the best of my knowledge and belief.

Date: _____

Signature of Complainant

Print Name

Received by: _____

Date: _____

APPENDIX B--COMPLAINT FORM

Your Name: _____ Date: ____

Date of Alleged Incident(s) _____

Name of Person(s) you have a complaint against:

List any witnesses that were present: _____

Where did the incident(s) occur?

Please describe the events or conduct that are the basis of your complaint by providing as much factual detail as possible (i.e. specific statements; what, if any, physical contact was involved; any verbal statements; what did you do to avoid the situation, etc.) (Attach additional pages, if needed):

I hereby authorize the School to disclose the information I have provided as it finds necessary in pursuing its investigation. I hereby certify that the information I have provided in this complaint is true and correct and complete to the best of my knowledge and belief. I further understand providing false information in this regard could result in disciplinary action up to and including termination.

Date: _____ Signature of Complainant _____

Print Name _____

APPENDIX C - Workplace Violence Prevention Plan

BRIDGES CHARTER SCHOOL has adopted a Zero Tolerance Policy for workplace violence.

Consistent with this policy, acts or threats of physical violence, including intimidation, harassment, and/or coercion, which involve or affect BRIDGES employees, or which occur on BRIDGES property will not be tolerated.

DEFINITIONS

Emergency - Unanticipated circumstances that can be life threatening or pose a risk of significant injuries to employees or other persons.

Engineering controls - An aspect of the built space or a device that removes a hazard from the workplace or creates a barrier between the employee and the hazard.

Log - The violent incident log required by LC section 6401.9.

Plan - The workplace violence prevention plan required by LC section 6401.9.

Serious injury or illness - Any injury or illness occurring in a place of employment or in connection with any employment that requires inpatient hospitalization for other than medical observation or diagnostic testing, or in which an employee suffers an amputation, the loss of an eye, or any serious degree of permanent disfigurement, but does not include any injury or illness or death caused by an accident on a public street or highway, unless the accident occurred in a construction zone.

Threat of violence - Any verbal or written statement, including, but not limited to, texts, electronic messages, social media messages, or other online posts, or any behavioral or physical conduct, that conveys an intent, or that is reasonably perceived to convey an intent, to cause physical harm or to place someone in fear of physical harm, and that serves no legitimate purpose.

Workplace violence - Any act of violence or threat of violence that occurs in a place of employment.

Workplace violence includes, but is not limited to, the following:

The threat or use of physical force against an employee that results in, or has a high likelihood of resulting in, injury, psychological trauma, or stress, regardless of whether the employee sustains an injury.

An incident involving a threat or use of a firearm or other dangerous weapon, including the use of common objects as weapons, regardless of whether the employee sustains an injury.

The following four workplace violence types:

Type 1 violence - Workplace violence committed by a person who has no legitimate business at the worksite, and includes violent acts by anyone who enters the workplace or approaches employees with the intent to commit a crime.

Type 2 violence - Workplace violence directed at employees by customers, clients, patients, students, inmates, or visitors.

Type 3 violence - Workplace violence against an employee by a present or former employee, supervisor, or manager.

Type 4 violence - Workplace violence committed in the workplace by a person who does not work there, but has or is known to have had a personal relationship with an employee.

Workplace violence does not include lawful acts of self-defense or defense of others.

Work practice controls - Procedures and rules which are used to effectively reduce workplace violence hazards

RESPONSIBILITY

The Administrative Coordinator for BRIDGES CHARTER SCHOOL shall oversee the WVPP, and has the authority and responsibility for implementing the provisions of this plan for the school. If there are multiple persons responsible for the plan, their roles will be clearly described.

Responsible Persons	Job Title Position	WVPP Responsibility(ies)	#	mail
Kelly Simon	Executive Director	Overall responsibility for the plan; approves the final plan and any major changes.	5 -492-3569	kelly.simon@bridgescharter.org
Kami Brown	Manager	Responsible for employee involvement and training. organizes safety meetings, updates training materials, and handles any reports of workplace violence.	05 -492-3569	kami.brown@bridgescharter.org
Cindy McCarthy	Daily Operations	Responsible for emergency response, coordinates emergency response procedures, and updates routine safety procedures and protocols on campus to include regular drill schedule.	805-492-3569	cindy.mccarthy@bridgescharter.o

Jose Rendon	Custodian	<p style="text-align: center;">Hazard identification, and coordination of cleanup, <i>conducts safety inspections, assists with emergency response procedures, and communicates any need for facility repair and responds to hazardous spill cleanup.</i></p>	805-492-3569	jose.rendon@bridgescharter.org
Juliana Paz			Juliana.paz@bridgescharter.org	

EMPLOYEE RESPONSIBILITIES

BRIDGES CHARTER SCHOOL’s prohibition against threats and acts of violence applies to all persons involved in the school’s operation, including but not limited to the staff, outside contractors and temporary workers and anyone else on the school site. Violations of this policy by any individual on the school site, by any individual acting as a representative of the school while off the school site will be enforced as well.

Every employee and every person on Bridges site is encouraged to report incidents of threats or acts of physical violence of which he/she is aware. The report should be made to the Director or Administrative Coordinator, the reporting individual's immediate supervisor, or another supervisory employee if the immediate supervisor is not available. Nothing in this policy alters any other reporting obligation established in policies or in state, federal or other applicable law.

ADMINISTRATION/SUPERVISOR RESPONSIBILITIES

Administration/Supervisors have a crucial role in making BRIDGES a safe and secure working environment by reducing the potential for employee workplace violence through appropriate and consistent use of sound supervisory practices and by applying timely corrective action when necessary. Adherence to BRIDGES policies, workplace rules and regulations, documentation of employee performance problems appropriately identifying early warning signs, appropriate workplace conduct, and/or conflict resolution will greatly assist in the prevention of potential workplace violence.

It is the responsibility of all staff to report incidents for investigations into alleged violations of this policy to the Administrative Coordinator on potential employee workplace violence situations as appropriate. It is the responsibility of the Administrative Coordinator to coordinate an investigation with the Assistant Director. The Administrative Coordinator should document all violations of the workplace violence prevention procedures so that appropriate corrective action can be taken.

EMPLOYEE ACTIVE INVOLVEMENT

BRIDGES CHARTER SCHOOL ensures the following policies and procedures to obtain the active involvement of employees in developing and implementing the plan:

- Administration will work with and allow employees to participate in:
 - Identifying, evaluating, and determining corrective measures to prevent workplace violence.
 - Administration will have **triannual** safety meetings with employees to discuss identification of workplace violence related concerns/hazards, evaluate those hazards and/or concerns, and how to correct them. These meetings could involve brainstorming sessions, discussions of recent incidents, and reviews of safety procedures. Faculty will be encouraged to send any concerns to the administration to be addressed at weekly/monthly faculty meetings as well.
 - Designing and implementing training.
 - Employees are encouraged to participate in designing and implementing training programs, and their suggestions are incorporated into the training materials. For example, an employee might suggest a new training scenario based on a recent incident. An annual survey will be conducted to gather staff feedback and to assess any new areas of concern after the initial survey to create the plan.
 - All employees will follow all workplace violence prevention plan directives, policies, and procedures, and assist in maintaining a safe work environment.
 - The plan shall be in effect at all times and in all work areas and be specific to the hazards and corrective measures for each work area and operation.

EMPLOYEE COMPLIANCE

Our system to ensure that employees comply with the rules and work practices that are designed to make the workplace more secure, and do not engage in threats or physical actions which create a security hazard for others in the workplace, include at a minimum:

- Training employees in the provisions of BRIDGES Workplace Violence Prevention Plan (WVPP)
- Effective procedures to ensure that all staff comply with the WVPP.
 - Include an overview in the Employee Handbook
 - Include time in back-to-school professional development to review WVPP
 - Provide all new-hire training in WVPP within 30 days of hiring
 - Provide 5 minute Q/A as needed monthly at faculty meetings
 - Encourage attendance at triannual safety meetings.
 - Provide retraining to employees whose safety performance is deficient with the WVPP.
 - ·Recognizing employees who demonstrate safe work practices that promote the WVPP in the workplace by acknowledging on annual employee reviews.
 - ·Discipline employees for failure to comply with the WVPP. (Document on annual performance review.)

COMMUNICATION WITH EMPLOYEES

We recognize that open, two-way communication between our administration and staff about workplace violence issues is essential to a safe and productive workplace. The following communication system is designed to facilitate a continuous flow of workplace violence prevention information between administration and staff in a form that is readily understandable by all employees, and consists of one or more of the following:

- New employee orientation includes workplace violence prevention policies and procedures.
- Workplace violence prevention training.
- Regularly scheduled meetings that address security issues and potential workplace violence hazards.
- Effective communication between employees and administration about workplace violence prevention and violence concerns. For example, ensure that administration and all employees can communicate effectively and in the employees' first language.
- Posted or distributed workplace violence prevention information.

How employees can report a violent incident, threat, or other workplace violence concern to employer or law enforcement without fear of reprisal or adverse action.

- Report to Administrative Coordinator
- Employees can anonymously report a violent incident, threat, of other violence concerns. This can be done by calling WeTip: [\(844\) 805-4738](tel:(844)805-4738)
- Safety App may be used to alert Administration of an emergency
- Panic Button may be engaged if faced with an intruder or dangerous situation

Employees will not be prevented from accessing their mobile or other communication devices to seek emergency assistance, assess the safety of a situation, or communicate with a person to verify their safety. Employees' concerns will be investigated in a timely manner and they will be informed of the results of the investigation and any corrective actions to be taken.

- Updates on the status of investigations and corrective actions are provided to employees through email and at safety meetings. These updates could include information about the progress of investigations, the results of investigations, and any corrective actions taken
- Updates during daily/weekly/monthly/triannual meetings to discuss the plan and any updates. These meetings could involve sharing updates to the plan, discussing recent incidents, and coordinating training sessions.

WORKPLACE VIOLENCE INCIDENT REPORTING PROCEDURE

BRIDGES CHARTER SCHOOL will implement the following effective procedures to ensure that:

All threats or acts of workplace violence are reported to an employee's supervisor or administration, who will inform the WVPP administrator. This will be accomplished by either emailing, texting, or calling them directly. If that's not possible, employees will report incidents directly to the WVPP administrator, Kami Brown, Administrative Coordinator.

- Employees can anonymously report a violent incident, threat, of other violence concerns. This can be done by calling WeTip: [\(844\) 805-4738](tel:(844)805-4738)
- Submit an online form for WeTip: <https://www.wetip.com/submit-a-crime-tip/>
- Signal App may be used to alert Administration of an emergency

- Panic Button may be engaged if faced with an intruder or dangerous situation

A strict non-retaliation policy is in place, and any instances of retaliation are dealt with swiftly and decisively. An employee who retaliates against a coworker for reporting an incident could face disciplinary action up to and including or termination.

EMERGENCY RESPONSE PROCEDURES

BRIDGES CHARTER SCHOOL has in place the following specific measures to handle actual or potential workplace violence emergencies:

Effective means to alert employees of the presence, location, and nature of workplace violence emergencies by the following:

- Alarm system and PA announcements will be used to alert employees of emergencies.
- Signal App will be engaged and a notice sent to notify staff of any potential danger, actions steps needed, any possible intruder w/ locations if known and to send out updates in real time.

BRIDGES will have evacuation or sheltering plans. Evacuation routes, locations of emergency exits are discussed with faculty regularly and posted on the campus, and instructions for sheltering in place are reviewed in safety meetings. Safety binders will be maintained in central locations throughout the campus.

How to obtain help from staff, security personnel, or law enforcement.

In the event of an emergency, including a Workplace Violence Emergency, contact or use the following:

- 911
- Panic Button
- Signal App
- Local Police Department: 805-494-8256
- Ventura County Sheriff: 805-654-2380

WORKPLACE VIOLENCE HAZARD IDENTIFICATION AND EVALUATION

The following policies and procedures are established and required to be conducted by BRIDGES to ensure that workplace violence hazards are identified and evaluated:

- Inspections shall be conducted when the plan is first established, after each workplace violence incident, and whenever the employer is made aware of a new or previously unrecognized hazard.
- Review all submitted/reported concerns of potential hazards:
 - Daily or weekly review of all submitted and reported concerns.
- Workplace Violence Hazards suggestion box

- Voicemail/email/text messages
- Agenda item on weekly leadership meeting to discuss any areas of concern
- Weekly check-in with custodians to review and address any potential facility hazards

PERIODIC INSPECTIONS

Periodic inspections of workplace violence hazards will identify unsafe conditions and work practices. This may require assessment for more than one type of workplace violence. Periodic Inspections shall be conducted:

- Annually with Charter Safe during their annual report (Administrative Coordinator)
- Annually during the first week back on campus (Administrative Coordinator)
- Annually during staff development (Administration)
- Routinely during weekly cleaning of campus (Custodians)

Periodic inspections to identify and evaluate workplace violence and hazards will be performed by the following designated personnel in the following areas of the workplace:

Specific Person Name/Job Title	Area/Department/Specific location
Custodian(s) Julio/Julian Paz	Classrooms/Office/Yard/MPR/Bathrooms (facility)
Administrative Coordinator	Outdoor Classroom/Office/Facility
Administration	Kelly Simon Cindy McCarthy Sky Stifel

Inspections for workplace violence hazards include assessing:

- The need for violence surveillance measures, such as mirrors and cameras.
- Procedures for employee response during any criminal act, including our policy prohibiting employees, who are not security guards, from confronting violent persons or persons committing a criminal act.
- Procedures for reporting suspicious persons or activities
- Effective location and functioning of emergency buttons and alarms.
- Posting of emergency telephone numbers for law enforcement, fire, and medical services.
- Whether employees have access to a telephone with an outside line.
- Whether employees have effective escape routes from the workplace.
- Adequacy of workplace security systems, such as door locks/lock blocks, entry codes, physical barriers, and working panic buttons.

- Frequency and severity of threatening or hostile situations that may lead to violent acts by persons who are service recipients of our establishment.
- Effectiveness of systems and procedures that warn others of actual or potential workplace violence danger or that summon assistance: working PA system, Signal APP with all employees, and alarms and panic buttons.
- The use of work practices such as the "buddy" system for specified emergency events.
- The availability of employee escape routes.
- How well our establishment's administration and employees communicate with each other.
- Access to and freedom of movement within the workplace by non-employees, including recently discharged employees or persons with whom one of our employees is having a dispute.
- Frequency and severity of employees' reports of threats of physical or verbal abuse by administration, or other employees, former employees, or community members.
- Any prior violent acts, threats of physical violence, verbal abuse, property damage or other signs of strain or pressure in the workplace.

WORKPLACE VIOLENCE WARNING SIGNS

Acts or threats of violence include conduct that is sufficiently severe, offensive, or intimidating to alter the employment conditions or to create a hostile, abusive, or intimidating work environment for one or several BRIDGES employees. Examples of workplace violence include, but are not limited to, the following:

- a. All threats or acts of violence occurring on BRIDGES premises, regardless of the relationship between BRIDGES and the parties involved in the accident.
- b. All threats or acts of violence occurring off BRIDGES premises involving someone who is acting in the capacity of a representative of BRIDGES.
- c. All threats or acts of violence occurring off BRIDGES site involving a BRIDGES employee if the threats or acts affect the legitimate interests of BRIDGES.
- d. Any acts or threats resulting in the conviction of an employee or of an individual performing services for BRIDGES on a contract or temporary basis, under any criminal code provision relating to violence or threats of violence which adversely affect the legitimate interests and goals of BRIDGES.

Specific examples of conduct that may be considered threats or acts of violence include, but are not limited to, the following:

- a. Hitting or shoving an individual.
- b. Threatening an individual or his/her family, friends, associates, or property with harm.
- c. Intentionally destroying or threatening to destroy BRIDGES property.
- d. Making harassing or threatening phone calls.
- e. Performing harassing surveillance or stalking.
- f. Suggesting or intimating that violence is appropriate.

- g. Unauthorized possession of firearms or weapons on BRIDGES property.

STRATEGIES TO DE-ESCALATE THREATENING BEHAVIOR

The following conflict resolution strategies may be helpful to de-escalate situations where an individual is exhibiting threatening or intimidating behavior:

- a. Project calmness; move and speak slowly, softly, and confidently.
- b. Encourage the person to talk; listen actively and patiently.
- c. Maintain a relaxed but attentive posture.
- d. Position yourself at an angle to the person rather than directly in front.
- e. Arrange yourself so your access to an exit is not blocked.
- f. Seek assistance; ask someone to sit in or signal to call for additional support.
- g. Acknowledge the person's feelings.
- h. Make small, specific requests such as asking the person to move to a quieter area, open area, or to move outside.
- i. Do not isolate yourself from the individual.
- j. Provide the person with time to calm down.
- k. Point out options, break big problems into smaller ones.
- l. Avoid sudden movements and maintain 3–6-foot distance.
- m. From reception, use the call button to call an adjacent department for assistance.
- n. Lock down buildings and department to prevent intruders' entry.
- o. Notify the Administrative Coordinator.

Any emergency, perceived emergency, or suspected criminal conduct shall be immediately reported to the Police Department. If someone is acting violently or is threatening someone, call 911 for an immediate police response.

INCIDENT MANAGEMENT

The degree to which employees can survive an actual act of violence in the workplace may depend upon recognition of potential problems and the measures taken in advance of an incident.

The following are basic building blocks for the development of a safety plan:

In the event of a medical emergency, immediately call 911 and administer appropriate first aid (if trained) or make the individual as comfortable as possible without being moved until first aid can be administered.

- a. Identify the physical security needs of the workplace.
- b. Discuss and coordinate emergency strategies with employees.
- c. To the extent possible, arrange for limited and authorized access to the affected work area.
- d. Establish protocol for calling the Police (emergency/non-emergency).
- e. Develop prearranged office procedures to alert others to the need for help.
- f. Develop a procedure to cease normal operations and secure the premises.
- g. Outline emergency evacuation procedures.
- h. Evaluate the need for security alarms, call buttons, surveillance cameras, security personnel, etc.

Employees should mentally “map out” a personal survival strategy in the event of workplace violence.

Workplace violence incidents will differ, and each situation will dictate a different response. The circumstances of a given situation will suggest which of, and in which order, the following should occur:

- a. Report to the Police by dialing 911 at the safest opportunity.
- b. Alert others (email, phones, signals, call button).
- c. Activate prearranged safety and security plan.
- d. Secure surroundings, lock doors.
- e. If appropriate, evacuate employees/leave the area.

MANAGING THE AFTERMATH OF AN INCIDENT

Police and other emergency response personnel will be available to manage all emergencies. Police will deal with criminal activity. However, it remains the responsibility of BRIDGES employees/staff to work together to try to normalize the workplace following an incident. The aftermath of a violent situation can be traumatic, characterized by confusion and disorientation. The wave of uncertainty, panic and disbelief will pass and, in its place, will be the task of normalizing the workplace. Depending on the severity of the incident and the recommendations of the Administration team, the

Administrative Coordinator will normally coordinate post incident normalization. The Administrative Team and office staff will be expected to take the lead in initiating and participating in debriefings following a violent act, normally within 72 hours of an incident.

EMERGENCIES

The school site has a disaster plan in case of an earthquake or other major disaster. Be familiar with the plan for our site. It is available to each employee and is on file in your school’s office.

In the event of a bomb threat, learn as much as you can while on the phone. Complete the bomb threat checklist found in your teacher handbook. Call 911 without delay. Be sure to identify yourself and the location. Notify administration immediately.

In the event of a medical emergency, immediately call 911 and administer appropriate first aid (if trained) or make the individual as comfortable as possible without being moved until first aid can be administered.

EMPLOYEE HANDBOOK ACKNOWLEDGEMENT

By my signature below, I acknowledge that I have received a copy of Bridges Charter School’s Employee Handbook, on the date indicated below and agree to my at-will employment as described below. I acknowledge that it is my responsibility to read and review the Employee Handbook carefully. I also acknowledge that it is my responsibility to ask for clarification if I do not understand any of the policies included in the Employee Handbook.

I understand that the Employee Handbook contains important information regarding Bridges Charter School’s expectations, policies and guidelines and that I am expected to comply with these expectations, policies and guidelines at all times. I understand that the Employee Handbook does not provide a binding contract, but provides guidelines for personnel concerning some of Bridges Charter School’s policies.

Just as I am free to terminate the employment relationship with Bridges Charter School at any time, Bridges Charter School, in its sole discretion, also reserves the right to modify or terminate the employment relationship with me at any time for any or no reason and with or without notice. Further, there is no agreement, express or implied, written or verbal, between the employee and Bridges Charter School for any specific period of employment, for continuing or long-term employment, or for guaranteed terms and conditions of employment. No one other than the Directors of Bridges Charter School, with the approval of the Board of Directors, has the authority to alter your employment at-will status, to enter into an agreement for employment for a specified period of time, or to make any agreement contrary to this policy. Further, any such agreement must be in writing and must be signed by the Executive Director or Director of Daily Operations. This is the entire agreement between Bridges Charter School and me regarding this subject. All prior or contemporaneous inconsistent agreements are superseded. If I have an individually negotiated written employment agreement with Bridges Charter School, then the terms and conditions of that agreement will prevail to the extent it differs from the policies in this Handbook.

Bridges Charter School reserves the right to modify, alter, add to or delete any of the policies, guidelines or benefits contained in this handbook at any time with or without notice.

Other than Bridges Charter School Board of Directors, no other entity or person has the authority to modify this employee handbook.

Employee Name (print) _____

Employee Signature: _____

Date: _____

_____ (Initial) I have read and received a copy of the Work Place Violence Prevention Plan

_____ (Initial) I understand I must complete mandated trainings as assigned in a timely manner

CALIFORNIA WORKPLACE “KNOW YOUR RIGHTS” NOTICE

(Provided pursuant to SB 294 – Workplace Know Your Rights Act)

Employee Name: _____

Date Provided: _____

YOUR RIGHTS AT WORK

Under California law, employees have important rights related to workplace protections, immigration matters, and interactions with government agencies

1. RIGHT TO A SAFE AND FAIR WORKPLACE

You have the right to:

- Be free from discrimination, harassment, and retaliation
- Work in a safe and healthy environment
- Receive proper wages, overtime pay, and meal/rest breaks

2. WORKERS’ COMPENSATION

If you are injured on the job, you may be entitled to:

- Medical care
- Temporary or permanent disability benefits

Report injuries promptly to your employer.

3. RIGHTS RELATED TO IMMIGRATION ENFORCEMENT

- Your employer **cannot allow immigration enforcement agents access to non-public areas** without a valid warrant
- Your employer **cannot provide access to employment records** without a subpoena or court order

- You have the right to **remain silent** when questioned by immigration officers

4. NOTICE OF IMMIGRATION INSPECTIONS

If your employer receives notice of an immigration inspection (such as an I-9 audit), you have the right to:

- Receive notice within **72 hours**
- Be informed of the results affecting you

5. RIGHT TO ORGANIZE

You have the right to:

- Join or support a union
- Engage in protected concerted activity regarding working conditions

6. PROTECTION FROM RETALIATION

Your employer may not retaliate against you for:

- Exercising any of your rights
- Reporting violations
- Participating in investigations

7. RIGHT TO FILE A COMPLAINT

You may file a complaint with the California Labor Commissioner’s Office or the California Civil Rights Department if you believe your rights have been violated.

8. EMERGENCY CONTACT DESIGNATION

You have the right to designate an emergency contact.

If you are arrested or detained during work hours, your employer will notify your designated contact if you have provided one.

Emergency Contact Name: _____

Phone Number: _____

ACKNOWLEDGMENT

I acknowledge that I have received this “Know Your Rights” notice.

Employee Signature: _____

Date: _____

Employer Representative: _____

Date: _____

Coversheet

Quote for STS

Section: VIII. Business and Operations
Item: C. Quote for STS
Purpose: Vote
Submitted by:
Related Material: Bridges_Samsung.pdf



Company Address	130-A W. Cochran St. Simi Valley, CA 93065 US	Created Date	4/20/2026
		Expiration Date	5/20/2026
Prepared By	David Holuby	Quote Number	Q-51891
Sales Email	david.holuby@stseducation-us.com	Account Name	Bridges Charter (CA)
Sales Phone	(805) 842-3642	Contact Name	Cindy McCarthy
Fax	(888) 801-3381	Contact Phone	(805) 492-3569
Bill To Name	Bridges Charter (CA)	Contact Email	cindy.mccarthy@bridgescharter.org
Bill To	1335 Calle Bouganvilla Thousand Oaks, CA 91360-6699	Ship To Name	Bridges Charter (CA)
		Ship To	1335 CALLE BOUGANVILLA THOUSAND OAKS, CA 91360-6699

Quantity	Product Name	Product Description	Sales Price	Calculated Total Price
2	Samsung WAF 75" IFP - WA75F	Samsung 75" WAF Android Interactive Flat Panel Display. 5 Year Standard Warranty - P/N: WA75F	\$1,399.00	\$2,798.00
2	RADIX-5YR	Radix VISO premium device management 5 year License	\$0.00	\$0.00
2	CA Environ Fee 35+" Collected	CA Environmental Electronic Waste Fee - Collected 35+" - \$6 per unit	\$6.00	\$12.00
2	B-Tech Fixed Wall Mount	Btech XL Universal Flat Screen Wall Mount. Accommodates large 55"+ displays, mounting patterns up to 900mm x 600mm and up to 220lbs - P/N: BT9901	\$70.00	\$140.00
1	Samsung WAF 75" IFP - WA75F	Samsung 75" WAF Android Interactive Flat Panel Display. 5 Year Standard Warranty - P/N: WA75F	\$1,399.00	\$1,399.00
1	B-Box Mobile Stand Base (all-in-one) - 481A98001	BalanceBox® Mobile Stand Base Use as "Fixed height" mobile cart (3 height positions). - P/N: 481A98001	\$299.00	\$299.00
1	RADIX-5YR	Radix VISO premium device management 5 year License	\$0.00	\$0.00
1	CA Environ Fee 35+" Collected	CA Environmental Electronic Waste Fee - Collected 35+" - \$6 per unit	\$6.00	\$6.00
1	Shipping Local Delivery Service	Local Delivery Service	\$245.00	\$245.00

Total Price	\$4,899.00
Tax*	\$353.88
Grand Total	\$5,252.88

We are committed to providing our customers with competitive pricing. Due to dynamic global market conditions, quoted prices may be subject to adjustment prior to order confirmation. Please contact your account representative for the most current pricing information.

***Sales tax is added for quoting purposes; if your organization is exempt from sales tax; please provide your tax exemption certificate. All sales are subject to applicable sales tax at the time of shipment.**

Financing options are available with approved credit.

STS Education stands behind the products and services we provide. For more information on our warranties and guarantees, visit: stsed.com/lifetime-parts-warranty/.

<https://www.stseducation-us.com/>

Coversheet

Rivers of Council-Topa field trip

Section: VIII. Business and Operations
Item: D. Rivers of Council-Topa field trip
Purpose: Vote
Submitted by:
Related Material: Rivers_of_council_invoice.pdf

INVOICE

Rivers of Council LLC
 2366 Alameda Ave
 Ventura, CA 93003-6669

riversofcouncil@gmail.com
 +1 (310) 422-1808

Bill to
 Bridges Charter School
 1335 Calle Bouganvilla
 Thousand Oaks, CA 91360

Ship to
 Bridges Charter School
 1335 Calle Bouganvilla
 Thousand Oaks, CA 91360

Invoice details

Invoice no.: 1006
 Terms: Net 30
 Invoice date: 05/01/2026
 Due date: 05/31/2026

#	Product or service	Description	Qty	Rate	Amount
1.	Services	Council retreat and training	1	\$5,891.93	\$5,891.93

Total **\$5,891.93**

Ways to pay



Mailing a check is great.

Note to customer

Thank you so much. We look forward to working together!

View and pay

Coversheet

Local Assignment Option

Section: VIII. Business and Operations
Item: E. Local Assignment Option
Purpose: Vote
Submitted by:
Related Material: Teacher_Consent_Form.pdf

TEACHER CONSENT FORM

Pursuant to the Education Code, written documentation is required from the district obtaining the teacher's consent prior to making assignment(s) outside of the teacher's current credential authorization.

District Name: Bridges Charter School Site: Bridges
 Name of School Site Administrator: Kelly Simon
 Teacher Name: Olivia Fernandez SS #: _____
 Teaching Credential Held: Multiple Subject
 Assignment: Humanities Grade Level: 7-8
 Date of Assignment: _____ Beginning Date: Aug 17, 2026 Ending Date: June 30, 2027

Limited Assignment Permit

- General Education Multiple or Single subject (GELAP) _____
(Subject Area)
- Special Education (SELAP) _____
(Area of Specialization)

General Education Local Assignment Options

- EC 44256 (b) Grade K-8 EC 44258.2 Grade 5-8
- EC 44258.3 Grade K-12 EC 44258.7 (c) (d) Grade K-12
- EC 44263 Grade K-12 EC 44865 Grade K-12

Other Local Teaching Assignment Options

- EC or Title 5: _____

I, Olivia Fernandez mutually consent to this assignment.

Olivia Fernandez
 Teacher's Signature 5/6/26
 Date Signed

Commonly used Education Codes

EC 44256 (b) The governing board of a school district by resolution may authorize the holder of a multiple subject teaching credential or a standard elementary credential to teach any subject in departmentalized classes to a given class or group of students below grade 9, provided that the teacher has completed at least 12 semester units, or six upper division or graduate units, of coursework at an accredited institution in each subject to be taught. The authorization shall be with the teacher's consent.

EC 44258.2 The holder of a single subject teaching credential or a standard secondary teaching credential may, with his or her consent, be assigned by action of the governing board to teach classes in grades 5 to 8, inclusive, in a middle school, if he or she has a minimum of 12 semester units, or six upper division or graduate units, of coursework at an accredited institution in the subject to which he or she is assigned.

EC 44263 A teacher licensed pursuant to the provisions of this article may be assigned, with his or her consent, to teach a single subject class in which he or she has 18 semester hours of coursework or nine semester hours of upper division or graduate coursework or a multiple subject class if he or she holds at least 60 semester hours equally distributed among the 10 areas of a diversified major set forth in Section 44314. A three-semester-unit variance in any of the required 10 areas may be allowed. The governing board of the school district by resolution shall provide specific authorization for the assignment. The authorization of the governing board shall remain valid for one year and may be renewed annually.

EC 44258.3 (a) The governing board of a school district may assign the holder of a credential, other than an emergency permit, to teach any subjects in departmentalized classes in kindergarten or any of grades 1 to 12, inclusive, provided that the governing board verifies, prior to making the assignment, that the teacher has adequate knowledge of each subject to be taught and the teacher consents to that assignment.

EC 44258.7 (c) & (d)

(c) A teacher employed on a full-time basis who teaches kindergarten or any of grades 1 to 12, inclusive, and who has special skills and preparation outside of his or her credential authorization may, with his or her consent, be assigned to teach an elective course in the area of the special skills or preparation, provided that the assignment is first approved by a committee on assignments. For purposes of this subdivision an "elective course" is a course other than English, mathematics, science, or social studies. The membership of the committee on assignments shall include an equal number of teachers, selected by teachers, and school administrators, selected by school administrators.

(d) Assignments approved by the committee on assignments shall be for a maximum of one school year, but may be extended by action of the committee upon application by the school site administrator and the affected teacher.

EC 44865

A valid teaching credential issued by the State Board or the Commission on Teacher Credentialing, based on a bachelor's degree, student teaching, and special fitness to perform, shall be deemed qualifying for assignment as a teacher in the following assignments, provided that the assignment of a teacher to a position for which 9/6/2011 qualifications are prescribed by this section shall be made only with the consent of the teacher:

- (a) Home teacher
- (b) Classes organized primarily for adults
- (c) Hospital classes
- (d) Necessary small high schools
- (e) Continuation schools
- (f) Alternative schools
- (g) Opportunity schools
- (h) Juvenile court schools
- (i) County community school
- (j) District community day schools
- (k) Independent study

Instruction of subject areas for which no credential exists (non-CTE):

Title V 80005(b) The holder of a teaching credential based on a baccalaureate degree and a teacher preparation program, including student teaching or the equivalent, may be assigned, with his or her consent, to teach subject-matter classes which do not fall within or are not directly related to the broad subject areas listed in (a) if the employing agency has determined the teacher has the requisite knowledge and skills. Verification of this decision must be kept on file in the office of the employing agency for purposes of the monitoring of certificated assignments pursuant to Education Code Section 44258.9(b). Such courses may include, but are not limited to, life skills, conflict management, study skills, leadership, teen skills, and study hall. Service in such assignments is limited to the grade level authorized by the teaching credential.

Service as a school site, school district, or county staff developer:

Title V 80020.4(a) & (b)-

(a) The holder of a California teaching credential based on a baccalaureate degree and a teacher preparation program, including student teaching or the equivalent, may serve as school-site, school district, and or county staff developer in grades twelve and below, including preschool, and in classes organized primarily for adults.

(b) A teacher serving as the staff developer for a specific subject must hold a credential in the subject or have his or her expertise in the subject verified and approved by the local governing board.

Service to develop, direct, implement or coordinate programs designed to improve instruction and enhance learning at a school site:

Title 5 Section 80020.4.1(a) The holder of a California teaching credential based on a baccalaureate degree and a teacher preparation program, including student teaching or the equivalent may develop, direct, implement, or coordinate programs designed to improve instruction and enhance student learning at the school site in grades twelve and below, including preschool, and in classes organized primarily for adults.

Coversheet

April Financials and Budget Overview with Preliminary Budget and May Revise Insights

Section: VIII. Business and Operations
Item: F. April Financials and Budget Overview with Preliminary Budget and May
Revise Insights
Purpose: FYI
Submitted by:
Related Material: Financials April 2026.pdf
FY26-27 Bridges Charter School Preliminary Budget Presentation.pdf

BRIDGES CHARTER SCHOOL - Financial Dashboard (April 2026)

1 Key Performance Indicators

ADA vs. Budget ● Cash on Hand ●

Net Income / (Loss) ● Year-End Cash ●

KEY POINTS

Enrollment as of month 8 (P2 Certified) was 5 students above budget, with an ADA of 400.50, 2.36 lower than budget, which would normally result in a decrease in LCFF; however, Bridges is seeing a \$77K increase in LCFF Revenue due to the increase of the TK Add-On rate from \$3148/ADA to \$5545/ADA.

Forecast includes \$41K of restricted one-time funds. An additional \$82K remains available to spend through FY27/28.

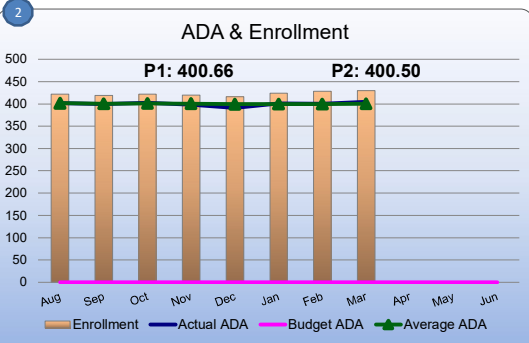
NOTABLE VARIANCES FROM ORIGINAL BUDGET:

REVENUE:

- +\$67K - LCFF higher than budget (TK Add-On +45K, ADA Increase +22K)
- +\$47K - OTHER FEDERAL higher than budget (CDEFA Grant Revenue)
- +\$91K - OTHER STATE higher than budget (Increased ELOP plus SSPD Grant)
- -\$16K - OTHER LOCAL lower than budget (Lower Child Care revenue projected)
- +\$81K - GRANTS/FUNDRAISING higher than budget (Wellness & Sprouts Grant)

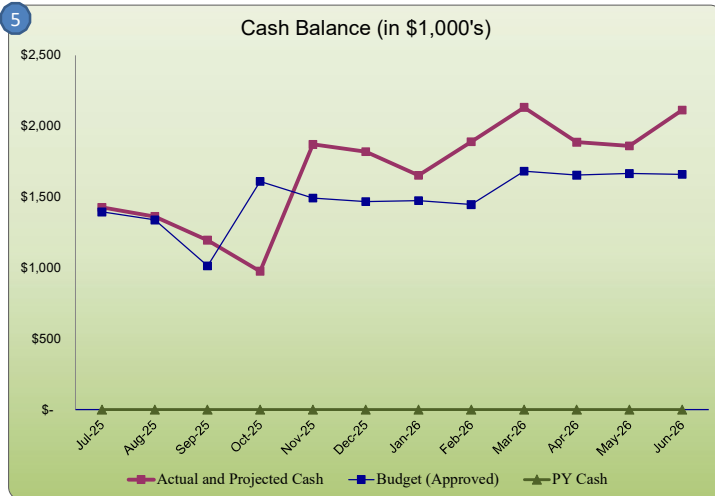
NET INCOME (LOSS):

- \$44K which is +\$281K better than budget [Budget expected (-\$237K) loss].



Attendance Analysis	Actual through Month 8	Actual P2	Budget P2	Budget Variance B/(W)	FY 24-25
Enrollment	430	430	425	5	0
Attendance %	94.57%	94.57%	94.79%	-0.22%	95.28%
Avg Daily Attendance (ADA)	400.50	400.50	402.86	(2.36)	394.45

Income Statement	Actual through 04/30/26	Forecast as of 04/30/26	FY 25-26 Budget	Budget Variance B/(W)	FY 24-25
Local Control Funding Formula	3,415,248	4,718,448	4,651,319	67,129	4,429,424
Federal Revenue	95,616	243,097	195,799	47,298	265,885
State Revenue	418,425	537,521	446,959	90,562	468,321
Other Local Revenue	255,449	317,328	317,290	38	760,098
Grants/Fundraising	85,580	164,000	97,400	66,600	87,171
TOTAL REVENUE	4,270,318	5,980,394	5,708,767	271,627	6,010,899
Certificated Salaries	2,029,305	2,463,589	2,336,930	(126,659)	2,272,318
Classified Salaries	634,687	744,034	766,020	21,986	736,044
Benefits	971,538	1,167,922	1,216,418	48,496	1,073,518
Student Supplies	310,433	416,964	423,137	6,173	376,631
Operating Expenses	870,737	1,123,870	1,183,667	59,797	1,236,469
Other	16,912	19,549	19,549	0	20,820
TOTAL EXPENSES	4,833,612	5,935,929	5,945,721	9,792	5,715,798
NET INCOME / (LOSS)	(563,294)	44,465	(236,954)	281,419	295,101



Year-End Cash Balance		
Projected	Budget	Variance
2,113,416	1,707,843	405,573

Balance Sheet	6/30/2025	3/31/2026	4/30/2026	6/30/2026
Assets				
Cash, Operating	1,613,830	2,132,026	1,886,218	2,113,416
Cash, Restricted	0	0	0	0
Accounts Receivable	566,294	37,149	37,149	738,718
Due From Others	370,400	19	19	19
Deposits/Prepays	2,571	20,450	26,753	26,753
Net Fixed Assets	184,664	171,857	170,177	182,540
Lease Assets	42,953	22,243	21,046	18,638
Other Assets	0	0	0	0
Total Assets	2,780,712	2,383,745	2,141,362	3,080,085
Liabilities				
A/P & Payroll	225,746	209,073	192,073	207,908
Due to Others	20,476	0	0	317,537
Deferred Revenue	0	0	0	0
Lease Liabilities	42,953	22,243	21,046	18,638
Other Liabilities	0	0	0	0
Total Debt	0	0	0	0
Total Liabilities	289,175	231,316	213,119	544,083
Equity				
Beginning Fund Bal.	2,196,436	2,491,537	2,491,537	2,491,537
Net Income/(Loss)	295,101	(339,108)	(563,294)	44,465
Total Equity	2,491,537	2,152,429	1,928,243	2,536,002
Total Liabilities & Equity	2,780,712	2,383,745	2,141,362	3,080,085

Available Line of Credit				
Days Cash on Hand	103	131	116	130
Cash Reserve %	28.3%	36.0%	31.9%	35.7%





Bridges Charter School Financial Analysis April 2026

Bridges Charter School is projected to have a net income \$45K in FY25-26 compared to (-\$237K loss) in the board-approved budget. Reasons for this positive variance of \$281K are explained below in the Income Statement section of this analysis.

Balance Sheet

As of April 30, 2026, the unrestricted cash balance was \$1.89M. By June 30, 2026, the unrestricted cash balance is projected to be \$2.11M, which represents a 36% reserve.

As of April 30, 2026, the Accounts Receivable balance was \$37K compared to \$37K in the prior month pending revenue receipts from FY24/25.

As of April 30, 2026, the Accounts Payable balance, including payroll liabilities, totaled \$192K, compared to \$209K in the prior month.

Income Statement

Revenue

Total revenue for FY25-26 is projected to be \$5.98M, which is \$272K or 4.8% over budgeted revenue of \$5.71M. The forecast included the following significant revenue variances:

- **LCFF Revenue (8011-8098) \$67K increase** due to an increase in the TK Add-On rate from \$3148/ADA to \$5545/ADA.
- **All Other Federal Revenue (8299) \$43K increase** due to the CDFA Reimbursement grant revenue not in the original budget.
- **Expanded Learning Opportunity Program (8595) \$29K increase** due to an increase in the ELOP rate to \$1575/ADA
- **State Revenue - Other (8599) \$49K increase** due to the addition of the new Student Support and Professional Development Discretionary Block Grant (SSPDD) from the state.
- **Childcare & Enrichment Program Fees (8682) \$16K decrease** due to a lower estimated total than originally budgeted.
- **Grants (8692) \$81K increase** due to the newly procured Wellness Grant along with the 10K Sprouts Grant as of January 2026.

This report will discuss revenue and expenditure variances from the Board-approved budget that are above \$20,000 and 10%.



Expenses

Total expenses for FY25-26 are projected to be \$5.94M, which is \$10K or 0.2% under budgeted expenditures of \$5.95M. The forecast included the following significant expense variances:

- **Salaries & Benefits (1000-3999) \$56K increase as follows:**
 - +\$56K due to a one-time 2% increase for all staff in November 2025
- **Operating Services (5000-5999) \$59K decrease as follows:**
 - **Other Student Instructional Services (5849) \$15K under**
 - **All Other Consultants & Services (5859) \$43K under**

ADA

Budget P2 ADA was 402.86 based on enrollment of 425 and a 94.8% attendance rate.

Month 8 ADA was 404.74 with a 94.1% ADA rate.

Forecasted and P2 Certified ADA is 400.50 with an ending enrollment estimate of 430 and a 94.6% attendance rate.

This report will discuss revenue and expenditure variances from the Board-approved budget that are above \$20,000 and 10%.

Actuals as of 4/30/2026

2025-26 Budget	2025-26 Trend	Actuals as of 4/30/2026												FORECAST Jul-25 - Jun-26	
		Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26		Accrual
201,737	201,737	33,623	16,811	16,811	16,811	16,811	16,811	16,811	16,811	16,811	16,811	16,811	16,811	16,811	201,737
530	530	3,470	2,236	2,236	2,928	2,454	2,236	2,792	2,236	2,236	2,236	2,236	2,997	265	530
21,622	29,011	-	-	-	-	-	-	-	-	-	-	-	-	1,594	29,011
88,000	88,000	34,726	28,090	3,800	(2,984)	1,896	8,990	1,269	8,990	3,182	1,401	3,336	3,336	3,336	88,000
26,430	26,430	355	2,684	2,684	474	4,253	1,002	6,481	1,700	4,466	4,466	4,466	4,466	4,466	26,430
20,999	20,999	-	-	-	3,371	1,124	10,763	2,871	10,763	2,871	2,871	2,871	2,871	2,871	20,999
30,365	30,365	4,474	3,209	1,550	4,357	2,273	1,876	4,751	1,550	1,550	1,550	1,550	1,550	1,550	30,365
147,805	136,485	-	6,402	10,989	11,877	9,148	13,060	11,085	6,083	28,291	15,639	15,639	15,639	15,639	136,485
3,500	3,500	4,308	-	3,081	1,564	1,080	1,440	1,440	1,800	408	10,230	10,230	10,230	10,230	3,500
50,885	36,299	-	-	3,081	1,564	1,080	1,440	1,440	1,800	408	10,230	10,230	10,230	10,230	36,299
5,000	11,551	234	3,280	380	3,265	175	147	1,650	147	99	2,801	2,801	2,801	2,801	11,551
248,146	3,500	9,687	3,280	55,683	10,037	12,478	14,190	15,028	9,687	406	29,670	29,670	29,670	29,670	3,500
29,680	205,505	8,447	1,687	6,404	(874)	13	73	756	406	40	2,404	2,404	2,404	2,404	205,505
24,636	24,636	79	-	-	-	-	-	-	-	-	581	581	581	581	24,636
1,240	1,240	-	-	-	-	-	-	-	-	-	-	-	-	-	1,240
46,513	47,184	-	-	-	-	-	-	-	-	-	-	-	-	-	47,184
27,910	27,160	1,838	2,879	2,532	2,273	3,020	1,731	3,224	1,128	1,189	2,418	2,418	2,418	2,418	27,160
10,385	2,500	13	-	-	-	-	-	-	-	-	1,244	1,244	1,244	1,244	2,500
3,300	3,300	267	240	177	174	165	174	339	165	165	717	717	717	717	3,300
1,421	1,933	211	129	198	155	155	155	155	155	155	155	155	155	155	1,933
21,300	18,204	1,500	1,704	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	18,204
3,585	3,945	3,196	-	42	244	44	65	144	144	16	97	97	97	97	3,945
1,183,667	1,123,870	205,155.10	18,934.66	113,102.20	91,427.36	65,028.04	56,744	101,142	67,731	61,120	89,353	95,691	84,604	68,838	1,123,870.06
19,549	19,549	1,735	1,735	1,680	1,680	1,680	1,680	1,680	1,680	1,680	1,680	1,680	957	19,549	
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
19,549	19,549	1,735	1,735	1,680	1,680	1,680	1,680	1,680	1,680	1,680	1,680	1,680	957	19,549	
5,945,721	5,935,929	318,581	375,843	598,061	544,956	548,802	443,639	508,365	489,219	501,204	504,943	561,021	472,458	68,838	5,935,929
(236,954)	44,465	(316,928)	(293,520)	(495,234)	(325,983)	851,094	(89,163)	(159,722)	248,108	242,240	(224,185)	138,126	64,833	404,800	44,465
-	64,014	-	-	-	-	-	-	-	-	-	-	-	-	-	64,014
-	64,014	-	-	-	-	-	-	-	-	-	-	-	-	-	64,014
-	64,014	-	-	-	-	-	-	-	-	-	-	-	-	-	64,014
-	64,014	-	-	-	-	-	-	-	-	-	-	-	-	-	64,014
-	64,014	-	-	-	-	-	-	-	-	-	-	-	-	-	64,014

2025-26 Budget

2025-26 Trend

Budget V
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Actuals as of 4/30/2026

	2025-26 Budget	2025-26 Trend	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Accrual	FORECAST Jul-25 - Jun-26
Operating Activities			1,613,830	1,426,821	1,361,684	1,195,104	975,896	1,871,077	1,819,917	1,652,455	1,889,300	2,132,026	1,886,218	1,860,153	2,113,416	1,613,830
Accounts Receivable		44,465	(316,928)	(293,319)	(495,234)	(325,983)	851,094	(89,163)	(159,722)	248,108	242,240	(224,185)	138,126	64,833	404,800	44,465
Accounts Payable		936,694	28,826	395,236	71,150	20,667	126,576	4,811	(0)	4,811	(0)	-	26,201	16,219	(743,990)	941,966
Prepaid Expenses		(10,943)	-	-	(15)	-	(24,196)	3,410	400	(23,495)	(3,576)	(15,447)	186,255	-	21,653	(743,990)
Other Receivables		297,061	84,769	(203,319)	28,286	13,013	(52,838)	(29,209)	(29,209)	(23,495)	(3,576)	(15,447)	(66,160)	186,255	21,653	(10,943)
Other Payables		644	(11,290)	(1,162)	(1,171)	(1,175)	(1,180)	(1,184)	(1,184)	(1,188)	(1,193)	(1,197)	(1,202)	(1,206)	14,827	297,061
Vacation Liabilities		14,183	11,290	1,162	1,171	1,175	1,180	1,184	1,184	1,188	1,193	1,197	1,202	1,206	14,827	(9,487)
Other Liabilities		(6,896)	12,358	55,631	6,471	8,726	(10,762)	7,014	7,014	5,474	7,663	(1,553)	(125,912)	-	(6,896)	24,315
Other Assets		(24,181)	2,232	(423)	(797)	(2,457)	(2,457)	(2,457)	(2,457)	(3,143)	(5,682)	(6,303)	-	-	(24,181)	(6,896)
Revenue		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Pension Liability		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Lease Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Term Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Term Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
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Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Liabilities		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Net Other Assets		-														

Bridges Charter School 2026-27 Budget

May 20, 2026

26/27 State Budget Update – MAY REVISE

Big Picture: State Fiscal Outlook Improves

State revenues projected \$16.5B higher than January estimates over the 2024–27 window.

Prop 98 guarantee increases by approximately \$6.4B compared to January proposals.

Total TK–14 Prop 98 funding reaches \$127.1B in 2026–27.

May Revision reflects stronger reserves and a more stable fiscal outlook for schools.

A significant portion of new funding is deposited into the Prop 98 Rainy Day Fund.

Governor's May Revise Proposed Budget

Key Funding Changes

LCFF	<ul style="list-style-type: none">• Statutory COLA increases from 2.41% (January) to 2.87%.• Additional discretionary LCFF augmentation creates a total 4.31% "Super COLA," intended in part to absorb costs of the proposed 14-week paid pregnancy leave mandate
SPED	<ul style="list-style-type: none">• Governor proposes an additional \$1.8B ongoing investment in Special Education.• Base rate increases from \$917 per ADA to \$1,340 per ADA.
Student Support & PD DBG	<ul style="list-style-type: none">• Increases from \$2.8B to \$5B.• Estimated funding rises from ~\$512 to ~\$937 per 25/26 P2 ADA (SSC estimate).
LREBG	<ul style="list-style-type: none">• Retains January proposal to repay remaining Learning Recovery Emergency Block Grant (LREBG) balance.
Additional Investments	<ul style="list-style-type: none">• Ongoing funding for Community Schools and Universal Meals• \$1,800/ADA minimum for Tier 2 ELO-P schools (<55% unduplicated pupils)• \$428.8M one-time extension of Literacy Coaches & Reading Specialists Grant• Additional Kitchen Infrastructure grant round

Bridges Charter – FY26/27 Enrollment & ADA Assumptions

Enrollment is assumed at 440 Students total with a conservative 94% ADA in FY26/27 and an ADA percentage gain of .25% annually through FY2030/32

	Summary by Grade Span		2025-26	2026-27 Trend	2027-28	2028-29	2029-30	2030-31
	Total Enrollment, TK - 3		197	192	192	192	192	192
	Average Attendance Rate, TK - 3		94.17%	94.00%	94.25%	94.50%	94.75%	95.00%
	Total ADA, TK - 3		180.78	180	180.96	181.44	181.92	182.40
	Total Enrollment, 4 - 6		145	150	150	150	150	150
	Average Attendance Rate, 4 - 6		95.46%	94.00%	94.25%	94.50%	94.75%	95.00%
	Total ADA, 4 - 6		136.76	141	141.38	141.75	142.13	142.50
	Total Enrollment, 7 - 8		88	98	98	98	98	98
	Average Attendance Rate, 7 - 8		94.68%	94.00%	94.25%	94.50%	94.75%	95.00%
	Total ADA, 7 - 8		82.96	92	92.37	92.61	92.86	93.10
	Grand Total, Enrollment		430	440	440	440	440	440
	Grand Total, ADA		400.50	413.60	414.70	415.80	416.90	418.00
CALPADS Data	2023-24	2024-25	2025-26	2026-27 Fall 1	2027-28	2028-29	2029-30	2030-31
Fall 1: 1.17 Report, LCFF								
Enrollment	373	416	421	440	440	440	440	440
Unduplicated Eligible Free/Reduced Meal Counts	85	85	78	82	82	82	82	82
EL Funding Eligible	-	-	12	13	13	13	13	13
Total Unduplicated FRPM/EL Eligible Count	85	85	78	82	82	82	82	82
% Unduplicated FRPM, EL, and Foster Youth	22.79%	20.43%	18.53%	18.64%	18.64%	18.64%	18.64%	18.64%
3-Year UPP Average			20.50%	19.19%	18.60%	18.64%	18.64%	18.64%
% Free/Reduced Lunch Eligible Students	23%	20%	19%	18.53%	18.53%	18.53%	18.53%	18.53%
% English Language Learner Students	0%	0%	3%	2.85%	2.85%	2.85%	2.85%	2.85%
% Immigrant Students	0%	0%	0%	0.00%	0%	0%	0%	0%

Bridges Charter – FY26/27 Other Assumptions (Before May Revise)

- Statutory & LCFF Cola = 2.87%
- Employer STRS Rate = 19.10%
- Employer PERS Rate = 26.40%
- OASDI Rate = 6.20%
- Medicare Rate = 1.45%
- SUI Rate = .05%
- Health & Welfare ER Contribution per eligible Employee = \$20,277
- Grade TK Add On Rate = \$5,704
- Grades TK-3 LCFF Rate = \$10,550
- Grades 4-6 LCFF Rate = \$10,710
- Grades 7-8 LCFF Rate = \$11,027

Bridges Charter – FY26/27

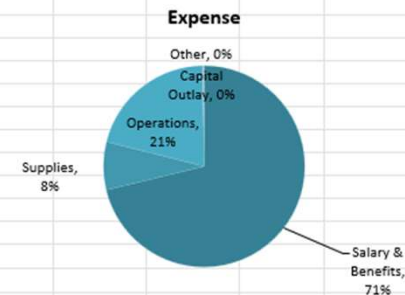
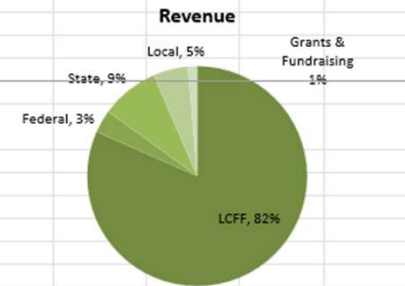
Staff Assumptions

- 15 FT Teachers TK-8
- 2 FT RSP Teachers
- 1 FT RTI Coordinator
- 1 FT Homeschool Lead Teacher
- 1 ESY Teacher (Summer)
- 6 PT Hourly Teachers (1-TK-8, 1-RTI Liaison, 4-Supervising Independent HS)
- 1 FT School Counselor
- 3 FT Directors (1-Executive Director, 1-Student Svcs Director, 1-Daily Ops)
- 5 PT Instructional Aides
- 5 PT Special Education Instructional Aides
- 7 PT Specialists (1-Art, 1-Chess AftSch, 2-Env.Ed/Nutrition, 1-Homeschool, 1-Librarian/Maker Space, 1-PE)
- 5 PT Child Care (1-Lead, 1-Supervisor, 3-Assistants)
- 2 Custodians (1-FT at 7 hours/day & 1 PT)
- 2 PT Food Service (1-Supervisor, 1-Assistant)
- 1 FT Admin Coordinator
- 3 Office Ees (1-FT at 7 hours/day, 1-PT Office Assistant, 1-PT Info Tech)

Bridges – Summary Budget (without May Revise)

BRIDGES CHARTER SCHOOL Multi-Year Budget Summary Prepared by ExED. For use by ExED and ExED clients only. ♦ 2025 ExED							
	2024-25	2025-26	2026-27 Forecast	2027-28	2028-29	2029-30	2030-31
Total Enrollment	416	430	440	440	440	440	440
ADA		400.50	413.60	414.70	415.80	416.90	418.00
% Free and Reduced	20%	19%	19%	19%	19%	19%	19%
% English Language Learners	0%	3%	3%	3%	3%	3%	3%
% Unduplicated Low Income, EL, Foster Youth	20%	19%	19%	19%	19%	19%	19%
INCOME							
8011-8098 - Local Control Funding Formula Sources	4,429,424	4,718,448	5,014,698	5,176,362	5,363,941	5,546,904	5,736,127
8100-8299 - Federal Revenue	265,885	243,097	205,902	207,550	209,217	210,904	212,610
8300-8599 - Other State Revenue	468,321	537,521	523,163	526,771	486,339	487,064	487,800
8600-8799 - Other Local Revenue	760,098	308,801	316,150	320,018	323,932	327,894	331,904
Grants/Fundraising	87,171	164,000	83,000	83,000	83,000	83,000	83,000
8999 - Other Prior Year Adjustment	-	8,527	-	-	-	-	-
TOTAL INCOME	6,010,899	5,980,394	6,142,914	6,313,701	6,466,429	6,655,766	6,851,440
EXPENSE							
1000 - Certificated Salaries	2,272,318	2,463,589	2,385,522	2,435,637	2,569,475	2,623,948	2,673,010
2000 - Classified Salaries	736,044	744,034	671,571	691,807	712,029	732,155	751,440
3000 - Employee Benefits	1,073,518	1,167,922	1,260,708	1,308,745	1,367,370	1,409,806	1,457,984
4000 - Supplies	376,631	416,964	466,733	476,126	485,778	495,696	505,888
5000 - Operating Services	1,236,469	1,123,870	1,261,993	1,271,772	1,310,244	1,349,761	1,390,481
6000 - Capital Outlay	20,820	19,549	15,989	13,562	13,562	13,562	13,562
7000 - Other Outgo	-	-	-	-	-	-	-
TOTAL EXPENSE	5,715,798	5,935,929	6,062,516	6,197,649	6,458,458	6,624,928	6,792,365
NET INCOME	295,101	44,465	80,397	116,051	7,971	30,838	59,076
Ending Cash Balance	2,033,627	2,533,214	2,659,286	2,755,795	2,789,813	2,807,771	2,850,701

2026-27 Revenue and Expense By Category



Bridges – Detailed Budget (cont) (before May Revise)

BRIDGES CHARTER SCHOOL							
Multi-Year Budget Detail							
Prepared by ExED. For use by ExED and ExED clients only. © 2025 ExED							
	2024-25	2025-26	2026-27 Forecast	2027-28	2028-29	2029-30	2030-31
Enrollment	-	430	440	440	440	440	440
ADA	394.45	400.50	413.60	414.70	415.80	416.90	418.00
ADA %	95.3%	94.6%	94.0%	94.3%	94.5%	94.8%	95.0%
UPP	57.2%	18.5%	19.2%	18.6%	18.6%	18.6%	18.6%
Income							
8011-8098 · Local Control Funding Formula Sources							
8011 Local Control Funding Formula	981,739	1,231,983	1,414,194	1,566,282	1,744,286	1,917,673	2,097,320
8012 Education Protection Account	78,890	80,100	82,720	82,940	83,160	83,380	83,600
8019 Local Control Funding Formula - Prior Year	(102,380)	164,131	-	-	-	-	-
8096 In Lieu of Property Taxes	3,364,560	3,406,365	3,517,784	3,527,140	3,536,495	3,545,851	3,555,207
8098 In Lieu of Property Taxes, Prior Year	106,615	(164,131)	-	-	-	-	-
Total 8011-8098 · Local Control Funding Formula Sources	4,429,424	4,718,448	5,014,698	5,176,362	5,363,941	5,546,904	5,736,127
8100-8299 · Federal Revenue							
8181 Special Education - Federal (IDEA)	99,973	99,973	104,275	105,598	106,937	108,292	109,664
8221 Child Nutrition - Federal	57,357	58,229	59,144	59,144	59,144	59,144	59,144
8291 Title I	108,556	26,345	26,608	26,875	27,143	27,415	27,689
8292 Title II	-	5,816	5,874	5,933	5,992	6,052	6,113
8295 Title IV, SSAE	-	10,000	10,000	10,000	10,000	10,000	10,000
8299 All Other Federal Revenue	-	42,734	-	-	-	-	-
Total 8100-8299 · Other Federal Income	265,885	243,097	205,902	207,550	209,217	210,904	212,610
8300-8599 · Other State Revenue							
8520 Child Nutrition - State	167,891	173,411	162,117	162,117	162,117	162,117	162,117
8550 Mandate Block Grant	7,024	8,189	8,455	9,000	9,327	9,647	9,976
8560 Lottery Revenue	120,076	114,262	117,501	117,813	118,126	118,438	118,751
8592 State Mental Health	32,863	34,135	35,052	35,145	35,238	35,332	35,425
8594 Supplemental Categorical Block Grant	46,313	-	-	-	-	-	-
8595 Expanded Learning Opportunity Program	90,492	100,000	100,000	100,000	100,000	100,000	100,000
8596 Prop 28 Arts & Music	-	58,800	58,873	61,530	61,530	61,530	61,530
8599 State Revenue - Other	3,662	48,724	41,165	41,165	-	-	-
Total 8300-8599 · Other State Income	468,321	537,521	523,163	526,771	486,339	487,064	487,800
8600-8799 · Other Local Revenue							
8660 Interest & Dividend Income	79,473	6,343	4,000	4,000	4,000	4,000	4,000
8682 Childcare & Enrichment Program Fees	5,925	9,160	7,281	7,281	7,281	7,281	7,281
8692 Grants	10,000	81,000	-	-	-	-	-

Bridges – Detailed Budget (cont) (before May Revise)

BRIDGES CHARTER SCHOOL Multi-Year Budget Detail Prepared by EXED. For use by EXED and EXED clients only. © 2025 EXED							
	2024-25	2025-26	2026-27 Forecast	2027-28	2028-29	2029-30	2030-31
8695 Contributions & Events	72,716	83,000	83,000	83,000	83,000	83,000	83,000
8696 Other Fundraising	4,455	-	-	-	-	-	-
8699 All Other Local Revenue	386,929	1,008	-	-	-	-	-
8792 Transfers of Apportionments - Special Education	287,771	292,290	304,869	308,737	312,651	316,613	320,623
Total 8600-8799 - Other Income-Local	847,269	472,801	399,150	403,018	406,932	410,894	414,904
Prior Year Adjustments							
8999 Other Prior Year Adjustment	-	8,527	-	-	-	-	-
Total Prior Year Adjustments	-	8,527	-	-	-	-	-
TOTAL INCOME	6,010,899	5,980,394	6,142,914	6,313,701	6,466,429	6,655,766	6,851,440
Expense							
1000 - Certificated Salaries							
1110 Teachers' Salaries	1,714,904	1,348,926	1,527,852	1,554,980	1,583,391	1,610,117	1,630,510
1120 Teachers' Hourly	-	481,466	220,110	223,888	311,730	317,576	323,550
1170 Teachers' Salaries - Substitute	44,018	66,466	70,000	71,050	72,116	73,197	74,295
1175 Teachers' Salaries - Stipend/Extra Duty	45,955	53,150	60,900	62,163	63,874	65,633	67,443
1213 Certificated Pupil Support - Guidance & Counseling	72,499	103,675	83,869	85,966	88,115	90,318	92,576
1300 Certificated Supervisors' & Administrators' Salaries	394,942	409,907	422,790	437,590	450,250	467,106	484,636
Total 1000 - Certificated Salaries	2,272,318	2,463,589	2,385,522	2,435,637	2,569,475	2,623,948	2,673,010
2000 - Classified Salaries							
2111 Instructional Aide & Other Salaries	440,952	373,262	269,045	278,063	286,456	295,200	302,961
2121 After School Staff Salaries	-	59,929	55,053	56,653	58,242	59,855	61,352
2131 Classified Teacher Salaries	-	-	44,099	45,202	46,332	47,490	48,677
2200 Classified Support Salaries	125,938	138,054	131,273	134,654	138,116	141,569	145,108
2300 Classified Supervisors' & Administrators' Salaries	-	77,274	78,872	80,843	83,269	85,767	88,340
2400 Classified Office Staff Salaries	169,154	95,516	93,230	96,392	99,614	102,274	105,002
2900 Other Classified Salaries	-	-	-	-	-	-	-
Total 2000 - Classified Salaries	736,044	744,034	671,571	691,807	712,029	732,155	751,440
Total 1000-2000 - Salaries	3,008,361	3,207,624	3,057,093	3,127,444	3,281,504	3,356,104	3,424,450
3000 - Employee Benefits							
3111 STRS - State Teachers Retirement System	425,317	470,546	464,058	473,840	499,619	510,245	519,842
3212 PERS - Public Employee Retirement System	150,353	164,853	177,295	186,096	185,840	185,235	190,114
3311 OASDI - Social Security	-	46,130	38,903	40,090	41,273	42,449	43,571
3331 MED - Medicare	87,309	46,511	44,328	45,348	47,582	48,664	49,655
3401 H&W - Health & Welfare	378,370	400,000	500,000	525,000	551,250	578,813	607,753

Bridges – Detailed Budget (cont) (before May Revise)

BRIDGES CHARTER SCHOOL							
Multi-Year Budget Detail							
Prepared by EXED. For use by EXED and EXED clients only. © 2025 EXED							
	2024-25	2025-26	2026-27 Forecast	2027-28	2028-29	2029-30	2030-31
3501 SUI - State Unemployment Insurance	1,317	2,889	1,529	1,564	1,641	1,678	1,712
3601 Workers' Compensation Insurance	30,852	34,908	34,596	36,808	40,166	42,722	45,336
3902 Other Benefits	-	2,087	-	-	-	-	-
Total 3000 - Employee Benefits	1,073,518	1,167,922	1,260,708	1,308,745	1,367,370	1,409,806	1,457,984
Total 1000-3000 - Salaries & Benefits	4,081,879	4,375,546	4,317,801	4,436,189	4,648,874	4,765,909	4,882,433
4000 - Supplies							
4111 Core Curricula Materials	2,714	9,685	9,983	10,283	10,591	10,909	11,236
4211 Books & Other Reference Materials	-	2,000	2,062	2,123	2,187	2,253	2,320
4311 Student Materials	227,613	110,040	113,429	116,832	120,337	123,947	127,665
4351 Office Supplies	-	17,537	18,077	18,619	19,178	19,753	20,346
4371 Custodial Supplies	-	20,000	20,616	21,234	21,872	22,528	23,203
4391 Food (Non Nutrition Program)	-	13,978	14,409	14,841	15,286	15,745	16,217
4399 All Other Supplies	-	10,115	10,427	10,739	11,062	11,393	11,735
4390 Other Supplies	-	24,093	24,835	25,580	26,348	27,138	27,952
4411 Non Capitalized Equipment	19,300	25,099	55,000	56,650	58,350	60,100	61,903
4711 Nutrition Program Food & Supplies	127,003	208,510	222,731	224,804	226,916	229,068	231,261
4713 CACFP Supper Food & Supplies	-	-	-	-	-	-	-
Total 4000 - Supplies	376,631	416,964	466,733	476,126	485,778	495,696	505,888
5000 - Operating Services							
5211 Travel & Conferences	18,840	10,025	13,000	10,300	10,609	10,927	11,255
5311 Dues & Memberships	5,859	14,993	19,258	19,838	20,429	21,031	21,661
5451 General Insurance	71,427	73,899	81,289	83,728	86,240	88,827	91,491
5511 Utilities	85,660	101,447	114,000	117,420	120,943	124,571	128,308
5521 Security Services	1,755	2,228	2,627	2,706	2,787	2,870	2,956
5599 Other Facility Operations & Utilities	-	764	788	811	835	861	886
5613 School Rent - Prop 39	214,877	201,737	227,789	234,623	241,662	248,911	256,379
5619 Other Facility Rentals	-	530	546	563	580	597	615
5621 Equipment Lease	-	29,011	24,900	25,647	26,416	27,209	28,025
5812 Field Trips & Pupil Transportation	17,125	88,000	90,710	93,432	96,235	99,122	102,095
5821 Legal	34,299	26,430	50,000	25,000	25,750	26,523	27,318
5823 Audit	14,424	20,999	21,646	22,295	22,964	23,653	24,363
5831 Advertisement & Recruitment	71,445	30,365	31,300	32,239	33,206	34,202	35,228
5842 Special Education Services	111,761	136,485	140,689	144,909	149,257	153,734	158,346
5849 Other Student Instructional Services	-	36,299	74,459	76,693	78,994	81,363	83,804

Bridges – Detailed Budget (cont) (before May Revise)

BRIDGES CHARTER SCHOOL							
Multi-Year Budget Detail							
Prepared by ExED. For use by ExED and ExED clients only. © 2025 ExED							
	2024-25	2025-26	2026-27 Forecast	2027-28	2028-29	2029-30	2030-31
5852 PD Consultants & Tuition	-	11,551	11,907	13,659	14,069	14,491	14,926
5854 Nursing & Medical (Non-IEP)	-	3,500	5,000	5,150	5,305	5,464	5,628
5859 All Other Consultants & Services	533,619	205,505	211,835	218,190	224,736	231,478	238,422
5861 Non Instructional Software	-	24,636	27,420	28,243	29,090	29,963	30,861
5865 Fundraising Cost	-	1,240	1,278	1,317	1,356	1,397	1,439
5871 District Oversight Fees	44,252	47,184	50,147	51,764	53,639	55,469	57,361
5899 All Other Expenses	2,536	27,160	30,000	30,900	31,827	32,782	33,765
5911 Office Phone	6,180	2,500	2,577	2,654	2,734	2,816	2,900
5913 Mobile Phone	-	3,300	3,402	3,504	3,609	3,717	3,829
5921 Internet	1,508	1,933	2,360	2,431	2,504	2,579	2,656
5923 Website Hosting	-	18,204	19,000	19,570	20,157	20,762	21,385
5931 Postage & Shipping	902	3,945	4,067	4,189	4,314	4,444	4,577
5999 Other Communications	-	-	-	-	-	-	-
Total 5000 - Operating Services	1,236,469	1,123,870	1,261,993	1,271,772	1,310,244	1,349,761	1,390,481
6000 - Capital Outlay							
6901 Depreciation Expense	20,820	19,549	15,989	13,562	13,562	13,562	13,562
Total 6000 - Capital Outlay	20,820	19,549	15,989	13,562	13,562	13,562	13,562
7000 - Other Outgo							
7438 Interest Expense	-	-	-	-	-	-	-
Total 7000 - Other Outgo	-	-	-	-	-	-	-
TOTAL EXPENSE	5,715,798	5,935,929	6,062,516	6,197,649	6,458,458	6,624,928	6,792,365
NET INCOME	295,101	44,465	80,397	116,051	7,971	30,838	59,076

Bridges – Detailed Budget (cont) (before May Revise)

BRIDGES CHARTER SCHOOL Multi-Year Budget Detail Prepared by ExED. For use by ExED and ExED clients only. © 2025 ExED							
	-2	-1	0	1	2	3	4
	2024-25	2025-26	2026-27 Forecast	2027-28	2028-29	2029-30	2030-31
Beginning Cash Balance	1,874,142	2,033,627	2,533,214	2,659,286	2,755,795	2,789,813	2,807,771
Cash Flow from Operating Activities							
Net Income	295,101	44,465	80,397	116,051	7,971	30,838	59,076
Change in Accounts Receivable	-	-	-	-	-	-	-
Prior Year Accounts Receivable	(936,694)	941,966	743,990	358,282	378,769	354,024	368,530
Current Year Accounts Receivable	-	(743,990)	(358,282)	(378,769)	(354,024)	(368,530)	(386,596)
Change in Due from	-	(19)	-	-	-	-	-
Change in Accounts Payable	668,851	(10,943)	(10,395)	(9,876)	(9,382)	(8,913)	(8,467)
Change in Due to	20,476	297,061	(317,537)	-	-	-	-
Change in Current Lease Payable	-	(9,487)	(11,016)	(3,811)	-	-	-
Change in Lease Assets	-	24,315	14,827	3,811	-	-	-
Change in Accrued Vacation	42,953	-	-	-	-	-	-
Change in Payroll Liabilities	6,896	(6,896)	-	-	-	-	-
Change in Prepaid Expenditures	(2,571)	(24,181)	(28,090)	(2,742)	(2,879)	(3,023)	(3,174)
Change in Deposits	-	-	-	-	-	-	-
Change in Deferred Revenue	292,092	-	-	-	-	-	-
Change in OPEB / Net Pension Liability	-	-	-	-	-	-	-
Change in Long Term Lease Liabilities	-	(14,827)	(3,811)	-	-	-	-
Change in Other Long Term Assets	(42,953)	-	-	-	-	-	-
Change in Other Long Term Liabilities	-	-	-	-	-	-	-
Depreciation Expense	159,543	19,549	15,989	13,562	13,562	13,562	13,562
Cash Flow from Investing Activities							
Capital Expenditures	(344,207)	(17,425)	-	-	-	-	-
Cash Flow from Financing Activities							
Source - Sale of Receivables	-	-	-	-	-	-	-
Use - Sale of Receivables	-	-	-	-	-	-	-
Source - Loans	-	-	-	-	-	-	-
Use - Loans	-	-	-	-	-	-	-
Ending Cash Balance	2,033,627	2,533,214	2,659,286	2,755,795	2,789,813	2,807,771	2,850,701

Coversheet

Contract with Burch Music Collective

Section: IX. Special Projects/Programs
Item: A. Contract with Burch Music Collective
Purpose: Vote
Submitted by:
Related Material: BRIDGES MUSIC COLLECTIVE VERSION 2 34 weeks.pdf

BRIDGES CHARTER SCHOOL

Burch Studio Music Collective Program: The Magical Musical Yearbook

34 week school year 2026-2027

Prepared by Burch Studio
Ventura County, California

PROGRAM OVERVIEW

Burch Studio provides a collaborative, project-based music program designed to engage students through songwriting, performance, and recording.

Students participate in a creative process that includes learning instruments, writing music, recording original work, and performing for their community. The program emphasizes creativity, teamwork, and real-world artistic outcomes.

PROGRAM STRUCTURE

2 Days Per Week

Instruction during the school day serving TK–8 through rotating classes.

The program is aligned with the school calendar and includes approximately 34 instructional weeks throughout the academic year.

Each program day includes:

- music instruction across grade levels
- songwriting and ensemble collaboration
- small-group music projects
- rehearsal and recording preparation

Two professional instructors are present during all program hours.

PROGRAM COMPONENTS

Music Instruction

Hands-on learning through rhythm, singing, instruments, and collaboration.

Songwriting & Ensemble Work

Students create original music and collaborate in group settings.

Recording Project

Students participate in recording and producing music throughout the year.

Vinyl Record Production

Student work is compiled into a vinyl record documenting the year's music.

Student Showcase

End-of-year performance event for families and the school community.

Weekly Staff Training

A 1-hour weekly training session led by Burch Studio to support teachers in integrating music into the classroom.

PROGRAM PRICING

Annual Program Fee (School):

\$60,000

Includes:

- two instructors for all program hours
- curriculum development and program design
- recording and production of student music
- weekly staff training sessions
- showcase planning and coordination
- program management by Burch Studio

MATERIALS & PRODUCTION FEE

\$40 per student (annual fee)

This fee supports:

- vinyl record production
 - recording and production materials
 - classroom instruments and supplies
 - student participation in the recording project
-

PROGRAM OUTCOMES

Students will:

- develop creativity and musical confidence
 - collaborate with peers through music
 - participate in songwriting and recording
 - perform for families and the school community
 - contribute to a recorded music project
-

ABOUT BURCH STUDIO

Burch Studio provides music education, recording, and performance programs for youth and community musicians in Ventura County.

The studio specializes in collaborative programs where students learn through real creative projects, culminating in recordings and live performances.

Prepared by
Burch Studio