



# East Bay Innovation Academy

## Board Meeting

**Date and Time**

Monday June 12, 2017 at 7:30 PM

**Location**

3400 Malcolm Avenue, Oakland, CA 94605

**Agenda**

	Purpose	Presenter	Duration
<b>I. Opening Items</b>			
<b>A.</b> Record Attendance and Guests		Julia Gitis	1
<b>B.</b> Call the Meeting to Order		Rochelle Benning	1
<b>C.</b> Approve Minutes	Approve Minutes	Rochelle Benning	1
<b>D.</b> Adjourn Open Session	Vote	Rochelle Benning	1
<b>II. Closed Session Pursuant to 54957</b>			
<b>A.</b> Open Closed Session and Record Attendance	FYI	Rochelle Benning	1
<b>B.</b> Conference with Labor Negotiator	Discuss	Rochelle Benning	24
Agency Designated Representative: Shelley Benning Employee Organization: ETA			
<b>C.</b> Adjourn Closed Session	Vote	Rochelle Benning	1
<b>III. Resume Open Session</b>			
<b>A.</b> Record Attendance	FYI	Rochelle Benning	1
<b>B.</b> Report on Closed Session	FYI	Rochelle Benning	1
<b>C.</b> Ratification of Collective Bargaining Agreement between EBIA and ETA	Vote	David Hardin	5
<b>D.</b> Public Comment	FYI	Rochelle Benning	30

**IV. Academic Excellence**

<b>A.</b> Year End Update - Intersession and Capstone	Discuss	David Hardin	10
<b>B.</b> LCAP	Vote	David Hardin	15
Review and approve LCAP Plan for 2017-2018			
<b>C.</b> Summer School and other key EBIA Summer Activities	FYI	David Hardin	5

**V. Enrollment/Hiring Updates**

<b>A.</b> Provide update on 2017-2018 Enrollment	FYI	David Hardin	5
<b>B.</b> Hiring Update	FYI	David Hardin	5

**VI. Finance/Business Operations**

<b>A.</b> May YTD Financial Update	Discuss	Michelle Cho	10
<b>B.</b> Review and Approve 2017-2018 Budget	Vote	Michelle Cho	10
<b>C.</b> Review 2016 - 2017 EBIA Schoolwide Scorecard	Discuss	David Hardin	15
<b>D.</b> EBIA Back Office Support for 2017-2018	Discuss	Laurie Jacobson Jones	5

**VII. Governance**

<b>A.</b> Review and vote on Consent Agenda	Vote	Rochelle Benning	3
(1) monthly check and credit card registers (May 2017 and April 2017)			
(2) 2017-2018 CharterSafe Insurance Policy and Quotation			
(3) 2017-2018 Education Protection Act (EPA) resolution and spending plan			
(4) CARS Submissions:			
(a) Application for 17-18 Title funding			
(b) Certification of Assurances			
(c) Protected Prayer Certification			
(d) Homeless Education Policy and Parental Involvement Policy			
(5) Back office support contract			
(6) 2016-2017 AIP			
(7) Traffic Study Contract			

**VIII. Other Business**

<b>A.</b> Other Important EBIA Dates	FYI	Rochelle Benning	1
- Summer School Dates: July 5 - July 28, 2017			
- Summer PD Launch: week of July 31, 2017			
- Devin Krugman Return: week of July 31, 2017			
- First Day of School: August 14, 2017			
<b>B.</b> Public Comment	FYI	Rochelle Benning	10

**IX. Closing Items**

<b>A.</b> Adjourn Meeting	Vote	Rochelle Benning	1
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# Cover Sheet

## Approve Minutes

**Section:** I. Opening Items  
**Item:** C. Approve Minutes  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for Board Meeting on 05-17-17  
2017\_05\_17\_board\_meeting\_minutes.pdf



# East Bay Innovation Academy

## Minutes

### Board Meeting

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#### **Date and Time**

Wednesday May 17, 2017 at 7:30 PM

#### **Location**

3400 Malcolm Avenue, Oakland, CA 94605

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#### **Board Members Present**

Julia Gitis (remote), Kate Doyle, Kelly Garcia, Ken Berrick, Laurie Jacobson Jones, Rochelle Benning, Tom Pryor

#### **Board Members Absent**

Gary Borden

#### **Guests Present**

David Hardin, Michelle Cho

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### **I. Opening Items**

#### **A. Record Attendance and Guests**

#### **B. Call the Meeting to Order**

Rochelle Benning called a meeting of the board of directors of East Bay Innovation Academy to order on Wednesday May 17, 2017 @ 7:34 PM at 3400 Malcolm Avenue, Oakland, CA 94605.

#### **C. Approve Minutes**

L. Jacobson Jones made a motion to approve minutes from the Board Meeting on 04-19-17.

Kelly Garcia seconded the motion.

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

**D. Adjourn Open Session**

K. Doyle made a motion to move to closed session.  
Laurie Jacobson Jones seconded the motion.  
The board **VOTED** to approve the motion.

**II. Closed Session Pursuant to 54957**

**A. Open Closed Session and Record Attendance**

Tom, Kate, Kelly, Laurie, David Hardin, Rochelle and Julia on the phone. Chastin Pierman from YMC  
Ken Berrick arrived late.

**B. Conference with Labor Negotiator**

L. Jacobson Jones made a motion to Establish Rochelle Benning as the negotiator for the school during Devin Krugman's absence.  
Ken Berrick seconded the motion.  
The board **VOTED** unanimously to approve the motion.

**C. Conference with Real Property Negotiations**

Update provided on real property negotiations.

**D. Adjourn Closed Session**

K. Garcia made a motion to Adjourn closed session.  
Kate Doyle seconded the motion.  
The board **VOTED** unanimously to approve the motion.

**III. Resume Open Session**

**A. Record Attendance**

Julia Gitis arrived and moved from attending via phone to attending in person.

**B. Report on Closed Session**

Shelley provided an update on the closed session.

**C. Public Comment**

public comment was provided.

**IV. Academic Excellence**

**A. June Intersession**

David Hardin discussed intersession plans.

**B. May Testing Update**

David provided the update on the year end state testing.

**C. Year End Capstone Update**

David Harden provided an update on the year end capstone projects that are in flight now across the program.

**D. LCAP Draft Review**

item postponed to the June board meeting.

**E. Upper School Bell Schedule Review**

David provided an update on the Upper School Bell schedule for the 2017-2018 school year.

**V. Development**

**A. Update on Development Activities**

Laurie and Katie Binder reviewed the development deck

**VI. Finance**

**A. April YTD Financial Update**

Michelle Cho provided a finance update for YTD April.

**VII. Governance**

**A. Review and vote on Consent Agenda**

L. Jacobson Jones made a motion to to approve the consent agenda.  
Kelly Garcia seconded the motion.  
The board **VOTED** unanimously to approve the motion.

**VIII. Other Business**

**A. Notice of Changed Date for June Board Meeting**

Change of date for June 2017 board meeting was shared with the board and the public in attendance at the meeting.

**B. Other Important EBIA Dates**

Dates for key events where shared with the board and public in attendance at the board meeting.

**C. Public Comment**

**IX. Closing Items**

**A. Adjourn Meeting**

L. Jacobson Jones made a motion to adjourn the meeting.  
Tom Pryor seconded the motion.  
The board **VOTED** unanimously to approve the motion.  
There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 9:07 PM.

Respectfully Submitted,  
Rochelle Benning

DRAFT



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The board **VOTED** unanimously to approve the motion.  
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Respectfully Submitted,  
Rochelle Benning

# Cover Sheet

## Ratification of Collective Bargaining Agreement between EBIA and ETA

**Section:** III. Resume Open Session  
**Item:** C. Ratification of Collective Bargaining Agreement between EBIA  
and ETA  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Draft Final EBIA ETA Agreement 061217.docx  
June 2017 - Board Report for Final Approval of CBA 061217.doc

**Agreement**

**Between**

**East Bay Innovation Academy**

**&**

**East Bay Innovation Teachers Association**

**Agreement Expiration: June 30, 2020**

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### APPENDICES

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Appendix B - Benefits Summary

Appendix C - Development Cycle and Professional Development Rubric

## **ARTICLE 1 – AGREEMENT/RECOGNITION**

- 1.1 This Collective Bargaining Agreement (hereafter referred to as “Agreement”) constitutes a bilateral and binding agreement by and between East Bay Innovation Academy (hereafter referred to as the “Employer” or “EBIA”) and East Bay Innovation Academy Teachers Association (hereafter referred to as “ETA” or the “Union” or “Association”).
- 1.2 EBIA recognizes ETA as exclusive representation pursuant to the Educational Employment Relations Act (“EERA” Government Code Section 3540, et seq.) for a collective bargaining unit consisting of “all certificated employees and all classroom teachers within the meaning of Education Code Section 47605(1) who are employed by the East Bay Innovation Academy” but excluding “any and all managers, supervisors, classified employees and confidential employees within the meaning of the Act.”
- 1.3 The parties to this Agreement recognize the duties and work performed by the employees in the bargaining unit described above shall be performed only by unit members and shall not be subcontracted or otherwise transferred out of the bargaining unit.

## **ARTICLE 2 – NEGOTIATION PROCEDURES**

### **2.1 Initial Proposals**

No later than the scheduled EBIA Board meeting in March of the calendar year in which this Agreement expires, EBIA and ETA shall sunshine initial proposals for a successor Agreement and submit initial proposals to each other.

### **2.2 Good Faith Negotiations**

The parties shall meet and negotiate in good faith on negotiable items on re-openers or a successor Agreement within thirty (30) calendar days of the March EBIA Board meeting in which the exchange of initial proposals takes place. Any agreement reached between the parties shall be reduced to writing and signed by them.

### **2.3 Distribution of Ratified Agreement**

Within fourteen (14) days of ratification of the Agreement by both parties herein, EBIA shall make the Agreement publicly available online on its shared drive.

### **2.4 New Unit Members**

EBIA shall be responsible for including a physical or digital copy of the negotiated Agreement when providing employment documents to all newly hired unit members.

### **2.5 Release Time for Negotiations**

Unit members appointed by ETA for the purpose of meeting and negotiating will receive reasonable release time from duties without loss of compensation as per the EERA.

## **ARTICLE 3 – UNION RIGHTS**

### **3.1 Access**

Consistent with legal requirements, any non-unit member authorized ETA representative (“Representative”) shall have the right of access to EBIA’s facilities including employee mailboxes and bulletin boards in the employee lounges. Upon arriving on the work site, the Representative shall notify the administration of their arrival and comply with any and all visitor requirements applicable to all other campus visitors.

ETA Representatives shall not in any way interrupt any employee’s duties or assignments. The Representative may contact employees before and after employees’ hours of service or during lunch and duty free periods.

### **3.2 Bulletin Board and/or Staff Calendars**

ETA shall have the right to post notices of Union matters on a bulletin board in the employee lounge or common work area. EBIA shall provide a bulletin board at the school site. ETA shall also have the right to use the staff scheduling/calendar tool as a means of communication for upcoming activities for general ETA knowledge.

### **3.3 Mailboxes and Email**

ETA shall be permitted to communicate with employees through mailboxes and email accounts. These communications shall not be defamatory, obscene, or in violation of the law, nor shall they disparage any individual employee, group of employees, or EBIA.

### **3.4 New Member Orientation**

EBIA shall provide ETA with an opportunity to address new employees at a mutually agreeable time during their orientation period.

### **3.5 Meetings and Equipment**

Consistent with School policy, EBIA shall permit ETA to use building facilities for meetings and for professional development workshops during non-work time. ETA shall have the right to use school-issued technology (i.e., laptops, projectors, etc.) for union-related activities and meetings during non-work time.

### **3.6 Equipment and Email Access**

EBIA will provide each unit member a chair, and access to a telephone and a computer for school business purposes. An email account will be made available for employees to use for school business.

### **3.7 Release Time at ETA Expense for Union Conferences/Workshops**

ETA may request the release of designated unit members from their regular duties with no loss of pay for no more than five (5) days of leave (total for the bargaining unit) for the purpose of attending local, state or national workshops, subject to the following conditions:

- A. The unit members utilizing the leave must give written notification on the EBIA absence form to the Head of School or designee in advance of the leave.
- B. The unit member must arrange for a suitable substitute according to EBIA procedures.
- C. Such leave will not be utilized on days when special events or special duties require the specific presence of that individual unit member.
- D. ETA shall reimburse EBIA for the cost of any substitute hired to replace unit members utilizing this leave, at the usual EBIA substitute teacher pay rate. Such release time will be taken in increments of not less than one-half day.

### **3.8 Released Time for Union Responsibilities**

A reasonable number of unit members shall be granted reasonable time off, without loss of compensation or other benefits, when meeting and negotiating with EBIA or when processing grievances.



## **ARTICLE 4 – ORGANIZATIONAL SECURITY/MEMBERSHIP**

### **4.1 Dues Deduction**

- 4.1.1 The right of payroll deduction of payment of membership dues and general assessments shall be accorded exclusively to ETA. EBIA shall deduct other voluntary payments as authorized by unit member and ETA.
- 4.1.2 Any unit member who is a member of ETA, or who applies for membership, may sign and deliver to EBIA an assignment authorizing deduction of unified membership dues, initiation fees and other such mutually-agreed payroll deductions as may be offered by ETA. Such authorization shall continue from year to year, unless revoked by the individual. Pursuant to such authorization, EBIA shall deduct one-tenth (1/10) of such dues from the pay of the unit member each month for ten (10) months in accordance with a dues schedule provided to EBIA by ETA. Deductions for unit members who sign such authorization after the commencement of the school year shall be appropriately prorated to complete payments by the end of the school year.

### **4.2 Payment of Dues**

With respect to all sums deducted by EBIA pursuant to this Article, whether for membership dues or agency fees, EBIA agrees to remit such monies to ETA within twenty (20) calendar days of the deduction, accompanied by an alphabetical list of unit members for whom such deductions have been made.

### **4.3 Agency Fee Provision**

Subject to applicable law, any unit member who is not a member of ETA, or who does not make application for membership within thirty (30) days of the effective date of the Agreement, or within thirty (30) days from the effective date of this Agreement, or within thirty (30) days from the date of commencement of assigned duties within the bargaining unit, shall become a member of ETA or pay to ETA a fee in an amount equal to membership dues, payable to ETA in one lump-sum cash payment or in the same manner as required for the payment of membership dues. In the event that a unit member does not pay such fees directly to ETA, ETA shall so inform the Head of School or designee, and the Head of School or designee shall immediately begin payroll deduction as provided in applicable law and in the same manner as set forth in this Article. There shall be no charge to ETA for such mandatory agency fee deductions.

### **4.4 Agency Fee Exemptions**

- 4.4.1 Any unit member who is a member of a religious body whose traditional tenets or teachings include opposition to joining or financially supporting employee organizations shall not be required to join or financially support ETA as a condition of employment; except that such unit member shall pay, in lieu of a service fee,

sums equal to such service fee to one of the following non-religious, non-labor organizations, or charitable funds exempt from taxation under Section 501 (c)(3) of Title 26 of the Internal Revenue Code.

4.4.1.1 OUSD African American Male Achievement Initiative

4.4.1.2 Bridge Program

4.4.1.3 Great Oakland Public Schools

- 4.4.2 To receive a religious exemption, the unit member must submit a written statement establishing the basis for the religious exemption, which shall not be unreasonably denied. The ETA executive board shall communicate in writing to the unit member its acceptance or rejection of the exemption, the reasons for a rejection, if any, and a process by which the unit member may appeal such rejection. If accepted, the unit member shall make the payment to an appropriate charity as described above. Such payment shall be made on or before the due date for cash dues/fees for each school year.
- 4.4.3 Proof of payment shall be made on an annual basis to ETA and Board as a condition of continued exemption from the payment of agency fee. Proof of payment shall be in the form of receipts and/or canceled checks indicating the amount paid, date of payment, and to whom payment in lieu of the service fee has been made.
- 4.4.4 Any unit member making charitable contributions as set forth in this Article, and who requests that the grievance or arbitration provisions of this Agreement be used on their behalf, shall be responsible for paying the reasonable cost of using said grievance or arbitration procedures.

#### **4.5 Hold Harmless Provision**

ETA agrees to indemnify, defend and save harmless EBIA, its officers, agents, and unit members from any and all claims, losses, and expenses occurring or resulting from the compliance or attempted compliance, enforcement or attempted enforcement, any request of ETA pursuant to this Article, the conduct of ETA in administering this Article, or challenge to the legality of, the provisions of this Article. ETA shall have the authority and the right to decide and defend any such action. It shall have the right to determine whether any such litigation shall or shall not be compromised, defended, resisted, tried or appealed. Prior to the exercise of these rights, ETA shall be required to inform and consult with EBIA. This hold harmless provision is not intended to apply to grievances and other disputes between EBIA and ETA involving the interpretation or implementation of the provisions in this agreement.

## ARTICLE 5 – GRIEVANCE PROCEDURE

### 5.1 Definition

A grievance is a claim by the unit member, unit members or ETA that a provision of this Agreement has been violated or misapplied with respect to that unit member, or members, such that it resulted in an adverse consequence to the unit member(s). All other claims, such as violations of statute, individual employment agreements, charters, board policies, personnel policies or employee handbooks, shall be outside the terms of this grievance procedure. Grievances shall be confidential unless the unit member requests a confidentiality waiver and such waiver is granted by the Head of School or designee. Failure by a grievant to follow the timelines or requirements in any step of this Article shall render the grievance withdrawn and shall be construed as a waiver of the party's rights under this procedure. Failure by EBIA to follow the timelines or requirements in any step of this Article shall permit the grievant to immediately begin the next step in this procedure. All timelines may be adjusted by mutual agreement between the grievant and EBIA.

### 5.2 No Reprisals

No reprisals of any kind shall be taken by any member or representative of the EBIA administration against any grievant, any unit member, or ETA, by reason of participation in the grievance process.

### 5.3 Informal Resolution

Any grievance shall first be addressed with the unit member's immediate supervisor within twenty-one (21) calendar days of when the grievant knew or should have known of the event or condition giving rise to the grievance. The grievant must identify the concern as a grievance and request an informal meeting. The grievant may authorize the ETA representative to represent them at any grievance meeting, and has the right to elect to be represented by ETA at any grievance meeting.

### 5.4 Formal Resolution

#### Step 1

If the grievance is not resolved informally, a unit member having a grievance may present the grievance in writing to the EBIA Head of School or designee within fourteen (14) calendar days of the informal resolution meeting. The grievance shall clearly state all of the following in writing: (1) the specific provisions of the Agreement alleged to have been violated, (2) the specific facts of the alleged violation, and to the extent known, dates and names of witnesses, (3) the adverse consequence resulting to the unit member, or ETA, and (4) the remedy requested by the grievant. The EBIA Head of School or designee shall meet with the unit member and shall provide a written response within seven (7) calendar days of the meeting.

## Step 2

If the grievant is not satisfied with the disposition of the grievance in Step 1, they may, within ten (10) calendar days after receiving the decision of the EBIA Head of School or designee, appeal the decision to the EBIA Board of Directors (“Board”) using the Notification of Grievance form. This appeal shall include a copy of the original grievance and the Step 1 response, a clear/concise statement of reasons for appeal, and the specific remedy sought, which remedy shall be the same as that requested at Step 1. The Board or its designated subcommittee shall meet within thirty (30) calendar days of the receipt of the Notification of Grievance Form. EBIA shall provide fourteen (14) calendar days written notice of the meeting to the unit member. The Board may set reasonable limitations on presentations or appearances, subject to the terms of this Agreement, but which must be communicated to the grievant prior to the appearance. Failure by the unit member or ETA representative to appear before the Board shall be a waiver of all rights under the grievance procedure. The Board shall render a decision within fourteen (14) calendar days of the Step 2 grievance submission.

## Step 3

If the grievant is not satisfied with the disposition of the grievance in Step 2, they may, within seven (7) calendar days after receiving the decision of the Board, petition that a meeting with a mediator from the State Mediation and Conciliation Service be held as soon as reasonably possible for all parties of interest. All costs for the services of the mediator shall be borne equally by ETA and EBIA. All other costs, except for release-time for the grievant(s) or ETA representative, shall be borne by the party incurring them. The mediator shall issue a written decision, including a proposed settlement, regarding the grievance.

Prior to the Board’s consideration of the mediator’s written decision, the unit member or ETA representative shall be provided an opportunity to address the Board in closed session. The Board shall render a final decision regarding the grievance within thirty (30) calendar days of receipt of the written decision.

## Step 4

In the event that the parties have not resolved the grievance with the assistance of the conciliator/mediator, the parties shall select an arbitrator from the State Mediation and Conciliation Services via a list of seven (7) arbitrators, with the party striking first to be determined by coin toss.

The decision of the arbitrator shall be submitted to the parties and will be final and binding upon the parties, provided however that the arbitrator shall not have jurisdiction to make any monetary award in excess of one (1) year of the unit member’s salary (provided the unit member makes a showing satisfactory to the arbitrator that they have attempted to mitigate their damages), nor shall the arbitrator have the authority to reinstate a terminated unit member. If any question arises as to the arbitrability of the grievance, such question

will be ruled upon by the conciliator/mediator only after they have had an opportunity to hear the merits of the grievance.

All costs for the services of the conciliator/mediator and/or arbitration, including but not limited to, per diem expenses, court reporter expenses, travel and subsistence expenses, and the cost, if any, of a hearing room, shall be borne equally by the parties. All other costs, except for released-time for the grievant(s), shall be borne by the party incurring them.

## **ARTICLE 6 – WORK YEAR/DAY**

Unit members recognize that their responsibilities require that they be available for student and/or parent consultation, as well as for other professional activities and responsibilities, which may include but are not limited to activities and events that promote family and community engagement in the school within limitation, and which may occasionally take place outside the normal school workday as specified below.

### **6.1 Work Year**

Returning unit members shall work a total of one hundred and ninety-six (196) days per school year (at least one week before instruction), and new unit members shall work no more than a total of two hundred and one (201) days per school year (at least two weeks before instruction). Professional development will occur during the week(s) before school starts, during at least ten (10) days of scheduled intersession over the course of the school year, and the day after the last instructional day of school.

Full professional development days are defined as days in which more than half of a unit member's work day is spent on professional development, during which time the unit member is not supervising students.

### **6.2 Work Day**

- 6.2.1 With the exception of days when office hours are required, the work day shall be seven (7) hours and thirty-five (35) minutes, commencing no earlier than 7:30 a.m. and ending no later than 6:00 p.m. The professional workday shall include staff/faculty meetings prior to the start of the instructional day (unless assigned otherwise by the Head of School), the instructional day, office hours (one hour twice weekly, as applicable – once after school and once before school in place of the staff/faculty meeting), and time for preparation/collaboration. At a minimum, all instructional staff members are to be on school grounds no later than the start of the work day, Monday through Friday, excepting legal holidays. When twice weekly office hours are not assigned, unit members are permitted to leave school grounds at the end of the instructional day. Students may be released earlier than the full instructional day as dictated in the EBIA-approved calendar; however unit members are expected to remain for the full school day or until released by the Head of School. Unit members are also expected to attend to all professional obligations whether or not performed during the normal work day, including but not limited to assessment of student work, communication with families, etc.
- 6.2.2 Staff/faculty meetings shall occur four (4) times per week before the school day, and may be used for departmental, grade level, SEL, capstone planning, or other collaborative endeavors. Staff/faculty meeting time may also be made available for unit members to participate in SST, 504, and IEP meetings.

- 6.2.3 Unit members are responsible for participation in Back-to-School Night, parent conferences, SST/504/IEP meetings, scheduled Promotion/Graduation Ceremonies, personal learning plan development days, and two (2) weekly office hours as noted above. EBIA and unit members shall meet annually to review and prioritize duties occurring outside of the workday. All other activities and student performances are subject to voluntary attendance and participation.
- 6.2.4 For each full-time unit member, personal/team preparation period(s) will be provided each regular day, dependent on the unit member's scheduled or assigned duties, with a minimum of two hundred seventy (270) minutes per week. Personal/team preparation time may only be spent on campus, unless authorized in advance by the Head of School or administrative designee. If a unit member is required to cover another unit member's class during their preparation time, then the unit member will only be required to cover a maximum of two (2) times without compensation during the school year. Any further required coverage will be paid on a pro-rata basis at the then-current substitute rate.
- 6.2.5 All full-time unit members will receive a duty-free meal period of forty-five (45) minutes during each regular day.
- 6.2.6 The aforementioned work day terms/conditions apply to unit members serving students in grades 6-8. The parties shall separately negotiate specific work day terms/conditions for unit members serving students in grades 9-12.

### **6.3 Additional Duties**

Unit members may volunteer for additional paid duties (i.e., Saturday School, Summer School, etc.) which will be distributed on an equitable basis and for which unit members shall receive extra compensation.

### **6.4 Course Assignments**

EBIA shall attempt to assign courses equitably. Unit members will have input into the number and type of courses they teach.

### **6.5 Holidays**

EBIA observes the following twelve (12) holidays each year: New Year's Day, Martin Luther King Day, President's Day, Cesar Chavez Day, Memorial Day, Independence Day, Labor Day, Columbus or Veteran's Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve, and Christmas Day.

## **ARTICLE 7 – EMPLOYMENT STATUS**

### **7.1 Non-Discrimination**

Neither EBIA nor ETA shall discriminate against any unit member on the basis of age, race, creed, color, national origin, ethnicity, gender, gender expression, marital status, sexual orientation, disability or on any other basis that is prohibited by law.

### **7.2 Administration of Agreement**

The parties shall make every reasonable effort to administer this Agreement in a consistent manner.

### **7.3 Employment Rights**

During the initial first three (3) complete and consecutive years of employment with EBIA, all employment at EBIA is on a probationary basis. During this probationary term, the unit member may be released from employment without cause. Annual non-renewal of employment during the first three (3) years of employment will also be on an at-will basis. This means either party may terminate employment at any time, including the end of a contract year, without advance notice or cause upon written notice to the other party.

Should a unit member be offered an employment contract for the fourth consecutive year of employment with EBIA, the contract shall be a fixed-term annual contract, but suspension without pay or termination during the term of employment may only be for cause as defined herein. Annual non-renewal of such post-probationary unit members may only occur if the unit member's annual evaluation is unsatisfactory, the unit member was unsuccessful in completing their PIP, and notice of non-renewal is provided by June 1 of that school year. Successful completion of a PIP is defined as growth target being met in 50% or more of the targeted PIP strands as referenced in the Evaluation Article herein.

All unit members employed by EBIA who have completed three (3) years of service (in paid status for at least 75% of the year) as of June 12, 2017 shall be understood to have completed their probationary period. Temporary or long term substitute employees hired as regular unit members shall have their prior year of temporary/substitute service at EBIA count towards the fulfillment of the probationary period.

Charter revocation or nonrenewal shall terminate any and all employment rights consistent with the effective date of revocation or nonrenewal of the charter.

### **7.4 Progressive Discipline**

In cases where EBIA seeks to terminate an employee for cause, absent serious misconduct, and without altering/impairing its ability to release/non-renew unit members as described herein, EBIA shall utilize a discipline process which shall include the following progression as applicable: verbal warning; written reprimand; suspension without pay; and



termination. In determining the appropriate level of disciplinary action, the Head of School or designee shall consider the nature of the unit member's prior misconduct, prior disciplinary action taken against the unit member, and the unit member's response to the disciplinary action.

*A. Verbal Warning*

A verbal warning may result in a post-conference summary memorandum.

*B. Written Reprimand*

Unless conduct warrants a written reprimand in the first instance, a written reprimand shall not be used unless the unit member has been verbally warned about similar actions. The unit member may be required to sign the reprimand to acknowledge receipt and a copy shall be placed in a unit member's personnel file. If a written reprimand is to be included in the unit member's personnel file, the unit member shall have ten (10) work days to submit a written response to be included along with the reprimand in the unit member's personnel file.

*C. Suspension Without Pay*

Suspension may be without pay for a period of up to fifteen (15) days, but shall not reduce or deprive the unit member of any other benefits. No unit member shall receive more than one (1) suspension without pay penalty for any single action or infraction.

*D. Administrative Leave with Pay*

The Head of School or designee, at their discretion, may place any unit member on administrative leave with pay for the purpose of investigating charges or complaints against such unit member. Full benefits shall remain in force pending the completion of an investigation. Such leave will not be considered disciplinary in nature.

*E. Termination*

The Head of School or designee may terminate on a for cause basis as defined herein. When a unit member is terminated for cause, the unit member may present a grievance pursuant to Article 5 of this Agreement, initiating at Step 1 of the formal grievance process within five (5) work days of service via certified US mail or personal service of written notice of termination, if the unit member contends that the termination is not in accordance with this Article. This procedure only applies to termination for cause as described herein, and shall not be applicable to the determination for a layoff/reduction in force.

## **7.5 For Cause Suspension/Termination**

In addition to its right to release or non-renew unit members as outlined above, and without impacting the progressive discipline policy outlined above, EBIA may also suspend without pay or terminate a unit member for cause at any time. The following independently or collectively are causes for discipline:

- Dishonesty, including theft or falsifying information, including employment records, employment information, or other school records.
- Unsatisfactory performance, as defined by the EBIA Evaluation Process outlined in this Agreement.
- Recording the work time of another employee or allowing any other employee to record your work time, or allowing falsification of any time card, either your own or another's.
- Unfit for service, including documentation of the inability to appropriately instruct or associate with children or students.
- Refusal to comply with or support any regulation or law of the state of California or refusal to comply with or support any policy or procedure of EBIA.
- Immoral conduct (as defined as any offense listed in Education Code sections 44010 and/or 44011; or in California Penal Code sections 11165.2 to 11165.6, inclusive); or a conviction or felony or of any crime involving a minor or moral turpitude (as defined under federal, state or local law.).
- Unlawful discrimination, including harassment or retaliation directed at students, their families, or other employees.
- Possession or being under the influence of illegal drugs, or alcohol while performing any professional duties at school, at any school community events, or when supervising students on or off campus.
- Gross negligence leading to the endangerment or harm of a child or children, or other employees.
- Conviction of any drug offense enumerated in Education Code section 44011 or any sex offense enumerated in Education Code section 44010.
- Unprofessional conduct, including as referenced in the performance rubric.
- Failure to maintain all teaching credentials and certifications required by the employer.
- Unauthorized absence, absence or repeated tardiness without authority or sufficient reason.
- Abandonment of position, including failure to return to duty upon expiration of any authorized leave or absence, or failure to report to duty for three (3) or more working days without prior notification and authorization of such absence.
- Insubordination (including but not limited to, refusal to do assigned work or use EBIA's established tools and methodologies), insolence, or the use of abusive or threatening language toward a supervisor or member of management, student, or other staff member(s).
- Negligent or willful damage to EBIA property or waste of EBIA supplies or equipment; unauthorized use of EBIA equipment, time, materials facilities or the School name.

- Engaging in unauthorized political activity during assigned hours of employment or otherwise in violation of applicable regulations or policies of the EBIA Board. This shall not apply to conduct expressly protected by California law.
- Abuse of leave privileges, including excessive tardiness, excessive absences, or a pattern of absences for trivial indispositions, misuse of sick leave, including failure to provide a physician's certificate when requested or required to do so.
- Failure to observe working schedules, including failure of an employee to obtain permission to leave work for any reason during normal working hours.
- Offensive or abusive conduct or language towards another employee, students, or the public.
- Unauthorized release of confidential information, as defined by law, from official EBIA records, including sharing or using student or school data in a manner that goes beyond the ordinary use of data required to perform the essential functions of a teaching role. And/or saving, holding or using student data or other confidential program data outside of EBIA's authorized systems and assigned tools.
- Provoking a fight or fighting at any time with any member of the EBIA Community, including management, staff members, service providers, students and their families.
- Carrying firearms or any other dangerous weapons on School premises at any time.
- Sleeping or otherwise not working during contracted working hours.
- Wearing unprofessional, inappropriate, or explicit styles of dress which may include exposure of undergarments, or the display of profane or derogatory language and/or images, while working or at school events
- 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, or at school events.
- Unauthorized soliciting or distribution of written materials during working time. Unit members may engage in minor and non-disruptive solicitations with the express written consent of the Head of School or designee.

Suspension or termination shall be initiated in writing by the Head of School or designee by providing Notice of Recommended Discipline ("Recommendation") and serving such Recommendation upon the unit member in person or by certified mail. A copy of the Recommendation shall also be provided to the ETA President. The Recommendation shall contain a statement, in ordinary language, of the factual basis upon which the disciplinary action is based, any rule or regulation alleged to have been violated, and the proposed penalty. The unit member shall also be given a copy of any documentary materials upon which such action is based and a statement of the unit member's right to respond verbally and in writing within five (5) work days prior to the proposed discipline being imposed, unless this deadline is extended by agreement of both the Head of School or designee and the unit member. Following this period, the unit member shall be provided a written Notice of Discipline in person or by certified mail setting forth the decision of the Head of School or designee.

## **7.6 Nonrenewal or Revocation of Charter**

Should the EBIA charter petition be non-renewed or revoked, the employment of all unit members shall be terminated effective the last day of school or upon effect of the non-renewal or revocation. This section shall not be subject to the grievance procedure.

**7.7 Reference to or Reliance upon the Education Code**

The parties expressly agree that the Education Code provisions for certificated discipline and interpreting case law do not apply to EBIA or this Agreement.

## **ARTICLE 8 – LAOFFS AND REEMPLOYMENT**

### **8.1 Layoffs**

Layoffs may occur due to programmatic needs, declining enrollment or a reduction in funds. Notice of layoff for the subsequent year will be sent to employees by May 15. For layoffs occurring during the school year, unit members will receive thirty (30) day notice of lay-off and a two (2) week severance payment. This benefit does not apply to employees provided with a lay-off notice by May 15 for the following school year.

If layoffs take place the following criteria shall be considered:

- Legal requirements and qualifications
- Performance evaluations
- Expertise and relevant experience

In the absence of substantial distinguishing differences in the above criteria, length of service at EBIA shall be the determining factor.

The decision of the Executive Director is final and not subject to the grievance procedure.

### **8.2 Reemployment**

Unit members may be reemployed to a subject area/program for which they hold certification in reverse order of layoff when a vacancy occurs for up to six (6) months from the day of layoff. In the event a unit member on the reemployment list refuses an employment offer twice, they will be removed from the list.

Each unit member on the reemployment list shall be required to provide EBIA in writing with a current address to which a letter of reemployment may be sent.

If a reemployment opportunity exists, EBIA shall mail such a letter to the unit member, certified mail, return receipt requested.

A unit member offered a reemployment opportunity must notify EBIA in writing of their decision within five (5) days of receipt of EBIA's offer.

## ARTICLE 9 – COMPENSATION

### 9.1 Salary Schedule and Initial Placement

- 9.1.1 Unit member salary shall be determined using the salary schedule attached as **Appendix A**. No unit member will be subject to a reduction in compensation as a result of the implementation of this salary schedule.
- 9.1.2 Salary shall be based upon years of teaching experience, performance level, and education level. EBIA shall accept all years of prior credentialed, or comparable to credentialed in the discretion of the Head of School, teaching experience (excluding student teaching) when determining initial unit member salary.
- A. Initial placement on the salary schedule for new unit members shall take into consideration the following equivalencies:
- a. Level 1 – BA and/or MA with less than two (2) years of credentialed teaching experience
  - b. Level 2 – MA and California Clear Credential with two (2) or more years of credentialed teaching experience
  - c. Level 3 – Academic completion in excess of an MA and/or National Board Certification with three (3) or more years of credentialed teaching experience.
  - d. Level 4 – Shall not be accessible for new hires.
  - e. Steps – Up to two (2) steps for every year of credentialed, full-time teaching experience.
  - f. With respect to hard-to-fill positions, as well as in cases where a highly desirable candidate has a documented offer of a more generous salary, following consultation with ETA, EBIA shall retain flexibility with respect to initial placement on the salary schedule in order to remain competitive in this regard.
- B. Initial placement on the salary schedule for current unit members shall take into consideration current salary, education level, years of teaching experience, years of service at EBIA, and previous performance levels on the teacher pd rubric referenced in Evaluation Procedures herein.

### 9.2 Salary Increases

- 9.2.1 Cost of Living: A Cost of Living increase shall be provided annually per unit member, reflected as the 1 step increase seen in the salary schedule given after each year of teaching service.
- 9.2.2 Additional Coursework: Salary increases shall also be awarded for EBIA approved/relevant coursework. Such coursework must be completed, and a printed transcript (or letter of verification from the university/college) must be submitted,

by November 15 in order for the unit member’s salary to be increased. Such increases shall only take effect when the required transcript/letter of verification is received.

9.2.3 Annual Performance Raise: Using the below formula, annual raises of up to 5 steps may be awarded based on strong performance.

A. All rubric-based ratings across all observations are averaged to create an overall performance score for the year using the following numerical equivalency system:

- Highly Effective - 4
- Effective - 3
- Developing - 2
- Ineffective - 1

B. Overall averages are placed in performance levels with assigned salary increases using the following system:

Level	Average Range	Salary Increase
I. Emerging	2.5 and Under	1 Step (COLA)
II. Accomplished	2.5 - 3.0	2 Steps (COLA + Additional Step)
III. Master	3.0 - 3.5	3 Steps (COLA + 2 Additional Steps)
IV. Expert	3.5 - 4.0	4 Steps (COLA + 3 Additional Steps)

C. An additional 1 step increase may be added based on strong performance and/or growth based on the discretion of the evaluator.

D. Two (2) consecutive years of performance at or above the unit member’s current performance level, may result in movement to the next highest performance level at the discretion of the evaluator. The evaluator must notify the unit member by May 1 of the recommendation. If the evaluator chooses not to automatically move the unit member based on performance, the unit member may submit a portfolio as described below.

9.2.4 Annual Incentive Plan: Unit members will participate in the EBIA annual incentive plan.

A. In Year 1, unit member AIP bonus range is 3% of base salary, based on attainment of established performance metrics, which will be annually drafted by the employee and annually approved by the assigned evaluator.

- B. In following years, unit member AIP bonus range is 4% of base salary, based on attainment of established performance metrics, which will be annually drafted by the employee and annually approved by the assigned evaluator.

9.2.5 Portfolio Process: After two (2) consecutive years at the same level, unit members may present a portfolio for review in order to be placed at the next highest level.

A. Portfolio Contents - At least two (2) artifacts from each rubric strand demonstrating performance above their current level. Examples may include:

- Knowing and Connecting with Students - Advisory planning documents, communications to advisory families, differentiated instructional and/or curricular plans for English Language Learners and/or Special Education students, etc.
- Planning Curriculum and Instruction - Course scope and sequence, unit plans, lesson plans, etc.
- Delivering Instruction - Video of teaching, check for understanding strategy bank, etc.
- Data and Assessment - Rubrics, assessed student work, etc.
- Learning Environment - Classroom norms, positive communications home, etc.
- Professionalism - Grade level or department team planning documents, records of professional development, etc.

B. Portfolio Review Process

- Portfolio submitted by June 1 for review by evaluator
- Evaluator provides written response by July 1 indicating whether or not a new performance level will be assigned for the next year

9.2.6 Employees must complete 75% of the work year in active status in order to progress in years of service at EBIA.

### 9.3 Additional Compensation

9.3.1 Employees may earn additional compensation at the hourly rate of \$40 for work not included in Work Year/Day as outlined herein or in the form of stipends as follows:

- \$1,000/year for Grade Level, Department or SEL Leads
- Up to \$2,000/year for performance of administrative duties as defined by EBIA (i.e. summer curriculum development, student support services, etc.)

9.3.2 All additional work opportunities shall be posted at least fifteen (15) days prior to a unit member being selected for that position in order for all unit members to have the opportunity to apply. As applicable, required responsibilities for each position shall be listed in writing at the time of posting.



- 9.3.3 The Head of School shall attempt to distribute additional work opportunities as equitably as possible. No unit member shall be permitted to hold more than two (2) stipend positions at a time.

## ARTICLE 10 – BENEFITS

EBIA shall make available to full-time unit members full health and welfare benefits coverage in accordance with the applicable plan(s) as set forth in **Appendix B**. Eligibility for and duration of health and welfare benefits shall be in accordance with the applicable health benefits plan(s) and applicable law. For full-time unit members continuing in employment year-to-year, or teaching summer school, health and welfare benefits coverage extends through the summer break.

Unit members may pay for health and welfare benefits coverage with pre-tax contributions.

Unit members who can provide written proof of alternate health and welfare benefits coverage as required by applicable law through their spouse/registered domestic partner shall receive a “cash in lieu of benefits” stipend of \$3,000 annually in exchange for declining EBIA coverage.

At least once annually, prior to the open enrollment period, EBIA will schedule a staff-wide presentation by the insurance provider to provide information and answer questions about plan options, costs and benefits.

Health benefits shall go into effect no later than the first contractual work day for all bargaining unit members.

EBIA shall make available a 403(b) plan.

EBIA shall provide retirement benefits through CalSTRS, subject to applicable law.

## ARTICLE 11 – LEAVES OF ABSENCE

### 11.1 Sick Leave

- 11.1.1 Full-time unit members shall accrue ten (10) days of sick leave at the beginning of each year. Part-time unit members, or unit members employed for less than a full school year, shall accrue a prorated amount of sick leave.
- 11.1.2 A unit member can use paid sick leave for the diagnosis, care, or treatment of an existing health condition or preventive care for themselves or a family member. A family member is a child (biological, adopted, or foster child, stepchild, legal ward, or a child to whom the unit member stands in loco parentis), parent (biological, adoptive or foster parent, stepparent, or legal guardian of a unit member or the unit member's spouse or registered domestic partner, or person who stood in loco parentis when the unit member was a minor child), spouse or registered domestic partner, grandparent, grandchild or sibling.
- 11.1.3 Unused sick leave shall accrue year to year. Any sick days accumulated but unused, if applicable, will be transferred to a public school employer upon separation from employment. Unit members will not be paid for unused sick time upon separation from employment. Upon retirement, the unit member's accrued sick leave, if any, may be applied towards service credit in accordance with the State Teachers Retirement System ("STRS") regulations.
- 11.1.4 EBIA shall provide each unit member with notification each pay period setting forth the amount of paid sick leave available to the unit member.
- 11.1.5 Unit members must call their supervisor as soon as practicable but no later than one (1) hour before their scheduled start time to report their absence. If a unit member anticipates an absence of several days, the unit member may notify EBIA with one (1) phone call. For absences of three (3) consecutive work days or more, EBIA may require physician verification. If requested, unit members may be expected to present a physician's statement certifying the unit member's fitness to return to duty after illness.

### 11.2 Personal Necessity Leave

- 11.2.1. All unit members may use up to five (5) days of sick leave for personal necessity leave per year.
- 11.2.2 Uses of personal necessity leave may include, but are not limited to, death or serious illness of a member of the unit member's immediate family (this is in addition to Bereavement Leave), an accident involving the unit member's person or property, or the person or property of an immediate family member, adoption of a child, the birth of child making it necessary for an unit member who is the parent of the child to be absent from their position during work hours, attendance at

conferences, personal legal matters, religious observances, and business matters that cannot reasonably be conducted outside of the workday.

11.2.3 Unit members must request personal necessity leave at least one (1) week in advance unless an emergency situation occurs.

### 11.3 **Unpaid Leave of Absence**

Upon approval by the Board of Directors, an unpaid leave of absence may be granted to a unit member for a period not to exceed one (1) school year for the following purposes: care for a member of the immediate family who is ill, long-term illness of the unit member, baby-bonding, service in an elected public office, educational travel, professional study or research or public service. Extension of such leaves may be granted at the sole discretion of the Board.

### 11.4 **Pregnancy Disability, Family/Medical, and California Family Rights Act Leaves**

EBIA shall provide Pregnancy Disability Leave, Family and Medical Leave Act leave and California Family Rights Act leave to unit members consistent with applicable state and federal law and regulations. After exhausting sick leave, unit members shall be entitled to receive up to eight (8) weeks of differential pay (e.g., difference in pay between the unit member and the substitute) during a leave for pregnancy disability and/or baby-bonding leave. Unless the unit member elects otherwise, differential pay shall commence immediately after the exhaustion of sick leave.

### 11.5 **Industrial Illness/Workers' Compensation**

EBIA shall provide industrial accident and illness leave consistent with applicable law and under the provisions of the existing insurance carrier. A unit member claiming an industrial accident or illness leave may be subject to examination by a physician designated by the EBIA's insurance carrier to assist in determining the qualification and the length of time during which the unit member will be temporarily unable to perform assigned duties, and the degree to which a disability is attributable to the injury or illness involved.

### 11.6 **Bereavement Leave**

EBIA provides unit members with three (3) days of paid leave due to the death of an immediate family member. This includes a parent (in-law and step-parent), spouse, dependent, sibling, stepsibling, grandparent, or grandchild. If a funeral is more than five hundred (500) miles from the unit member's home, the unit member may receive five (5) days of paid leave with prior approval from the unit member's supervisor.

### 11.7 **Jury Duty and Court Witness Leave**

If a unit member is summoned to report for jury duty, the unit member will be granted ten (10) days of paid leave upon notification and submission of a copy of the original summons

for jury duty to the unit member's supervisor. EBIA reserves the right to request that a unit member seek to be excused from or request postponement of jury service if the absence from work would create a hardship to the School. Unit members must report to work on any day, or portion thereof that is not actually spent in the performance of jury service. For each week of jury duty, a certificate of jury service shall be certified by the court and submitted to EBIA no later than Wednesday of the following week.

Unless otherwise provided by law, unit members shall receive two (2) days of paid leave to testify as a witness in response to a court order or subpoena. The unit member must submit a copy of the court order or subpoena as proof of specific days and time spent testifying.

#### 11.8 **Military and Military Spousal Leave of Absence**

EBIA shall grant a military leave of absence to any unit member who must be absent from work due to service in the uniformed services in accordance with the Uniformed Services Employment and Re-Employment Rights Act of 1994 ("USERRA").

#### 11.9 **Catastrophic Illness or Injury Leave**

Catastrophic injury or illness is defined as a life-threatening injury or illness of a unit member which totally incapacitates the unit member from work, as verified by a licensed physician, and forces the unit member to exhaust all leave time earned by that unit member, resulting in the loss of compensation for the unit member. Conditions that are short-term in nature, including, but not limited to, common illnesses such as influenza and the measles, and common injuries, are not catastrophic. Acute chronic illnesses or injuries, such as cancer or major surgery, which result in intermittent absences from work and which are long-term in nature and require long recuperation periods may be considered catastrophic. However, common conditions such as back pain, a broken limb, or influenza shall not be considered catastrophic. EBIA shall create a catastrophic leave program as follows:

11.9.1 Unit members may donate one (1) sick leave day per fiscal year for each five (5) days of accumulated leave they have to a sick leave bank for unit members suffering a catastrophic illness; however, each unit member must retain at least ten (10) sick leave days for their own account before donating.

11.9.2 Catastrophic leave requests must be submitted in writing to EBIA. Any unit member who received eligible sick leave credits under this program shall first exhaust all paid leave they have accrued.

11.9.3 The Head of School shall determine whether or not to grant a request for "Catastrophic Leave" based on verification by a medical doctor as to the nature of the illness or injury, anticipated length of absence and the prognosis for recovery. All information provided by the unit member requesting leave shall be held in strict

confidence by EBIA and shall be isolated from other employment records as required by applicable law.

11.9.4 The number of sick days that can be received by a unit member from the Catastrophic Leave bank is limited to forty-five (45) days per fiscal year.

11.9.5 If a unit member is probationary at the time of taking a catastrophic illness leave, that unit member's probationary status will resume upon return to work from such leave.

11.9.6 Unit members utilizing Catastrophic Leave shall have reinstatement rights in accordance with applicable law.

#### 11.10 **Professional Growth Leave**

In the interest of continuous staff professional development, EBIA shall make available to unit members up to three (3) days of paid leave per year to engage in such activities as school visitations, or attendance at conferences or workshops, subject to advance approval by the Head of School. This leave shall only be made available during scheduled Intercession days. The Head of School may elect to authorize additional leave days, either during scheduled Intercession days or on other dates.

## ARTICLE 12 – EVALUATION PROCEDURE

### 12.1 Purpose/Definitions

#### 12.1.1 Evaluation Overview and Components

In an effort to create a professional culture that supports unit member growth, EBIA will implement a consistent evaluation process to advance the improvement of the professional skills of all unit members and thereby, advancing improvement of the quality of education for all students of EBIA.

A unit member’s professional responsibility is to educate students in a rigorous college preparatory program to be to be thoughtful, engaged citizens who are leaders and innovators in a 21<sup>st</sup> century global world. The primary focus of EBIA’s model emphasizes three core areas. (1) Design Thinking and Project Based Learning; (2) Socio-Emotional Learning; and (3) Blended and Personalized Learning; which, when effectively integrated and delivered by unit members, appropriately implements the method in which staff engage and facilitate student learning as described in the EBIA Charter Petition.

EBIA must continuously strive to deliver the type of school model described above by incorporating project-based, technology infused learning experiences. To achieve this school model, EBIA will outline and evaluate a unit member’s level of performance in each of the six (6) professional development “strands” as follows:

1. Knowing and Connecting with Students;
2. Planning Curriculum and Instruction;
3. Delivering Instruction;
4. Assessment and Data;
5. Learning Environment; and
6. Professionalism.

The evaluation process shall apply to all unit members uniformly. The intent of the evaluation process is to develop a formative process by which the unit member may further improve their teaching methodology and practices in a positive environment. It is the goal of this process for every unit member to demonstrate proficiency in all standards. The establishment of any required assistance or other remediation plans under this procedure will not alter any rights of the employer under this Agreement.

#### 12.1.2 Extension of Timelines

If any of the activities called for under this Article are impracticable because of the illness or absence of the unit member or administrator, timelines set forth in this Article shall be extended to an equal number of days as the absence or illness.

### 12.1.3 Days

For the purpose of this article, “days” means workdays unless otherwise stated.

### 12.1.4 Grievance

The judgment of the evaluator shall not be subject to the contractual grievance procedure. Alleged violations of the evaluation process may be subject to the contractual grievance procedure.

## 12.2 Personalized Educator Plan (“PEP”)

EBIA’s expectation is that unit members will set goals that connect classroom teaching strategies and student learning, with an emphasis on continued improvement of instructional practice. The purpose of the Personalized Educator Plan (PEP) is the support continuous improvement and innovation of the instructional program at EBIA. EBIA encourages unit members to reflect on their classroom practice, set realistic goals for the year and collaborate with colleagues and administrators to design engaging and challenging activities for students.

A formal PEP will be developed in writing by each unit member at the beginning of each school year by no later than thirty (30) days from the first day of instruction, in partnership with the unit member’s supervisor. The PEP will contain a review of the previous year’s performance (if applicable) and will set goals in at least the following areas: contribution to the overall school goals as outlined in the Charter Petition; team goals; individual classroom goals; professional growth goals based on the professional development rubric provided to unit members; and goals for growth on the Social Emotional Learning (“SEL”) rubric. The PEP will be reviewed at the end of each teaching cycle by the unit member’s supervisor as compared to student data, observations by staff, and other talent managing systems. This review will consider data and other information under each area within the unit member’s PEP, and will assess those areas as “Highly Effective”, “Effective”, “Developing”, and “Ineffective.” After review and comparison to these standards, the unit member’s supervisor will then discuss the PEP and its outcomes in comparison to data with the unit member to determine action steps and to align any further professional development. This review will occur on a rolling basis, but the final PEP review shall occur no earlier than thirty (30) days prior to the end of the school year, and no later than the last day of the work year.

Unit members are expected to grow in all of the “strands” every year; and a unit member’s goals in these areas should identify clear objectives, a plan of action and the evidence used to measure attainment of the goals in line with the EBIA unit member Development Cycle and Professional Development Rubric attached as **Exhibit C**.

## 12.3 Modification of Objectives and Standards



During the course of the evaluation period, circumstances may change given the needs of the students EBIA serves, or due to other operational or financial considerations, which may require modification of the original objectives and standards contained in the PEP. The evaluator and/or the unit member may discuss these changes, and the evaluator may change the objectives and standards in the unit member's PEP to address the required modification.

## 12.4 Evaluation Process

Performance will be evaluated and assessed on an on-going basis during the contracted year on documents such as the EBIA job description, the EBIA Charter Petition, the unit member's PEP, and the California Standards for the Teaching Profession using the EBIA Teacher Evaluation Form. It is the goal of this process for every unit member to demonstrate proficiency in all standards.

### 12.4.1 Evaluator

A unit member's evaluator shall be the Head of School or administrative designee. An administrative designee, in this context, shall be an administrator at EBIA with applicable experience with respect to teaching practice, including at least two (2) years of classroom teaching experience.

### 12.4.2 Observations:

- Informal observations are ongoing. All informal observations may contribute to the evidence used for the overall evaluation. If utilized, informal observations may be given limited weight compared to formal observations.
- Each unit member will be formally observed at least three (3) times during the year; however the unit member may request an additional observation in order to collect evidence of proficiency in any standard/strand. Formal observations will be pre-scheduled at least seven (7) calendar days in advance. At the discretion of the evaluator, a pre-formal observation meeting may also be scheduled. Unit member and evaluator will schedule additional observations at times that are mutually agreeable. The number of times a unit member is observed may vary on an individual basis.
- Each formal observation shall be a minimum of seventy-five percent (75%) of a single lesson to qualify as a formal observation. An observation that lasts less than seventy-five percent (75%) of a single lesson will qualify as an informal observation.

### 12.4.3 Evaluation Timelines:

Unit members will receive a minimum of three (3) evaluations per year, with at least one (1) occurring prior to January 1, and the second to occur prior to the end of the school-year.

When a deficiency (defined as “ineffective,” or possibly as “developing” taking into account years of teaching experience, on Exhibit A) is noted at any time of the year, the unit member will be notified in a timely manner and provided guidance to correct the deficiency. When deemed necessary and appropriate by the evaluator, a noted deficiency (or deficiencies) may require an instructional improvement plan and/or disciplinary memorandum.

#### 12.4.4 Duties of Unit Member and Evaluator:

##### Unit Member Will:

- Implement duties as outlined in such documents as the EBIA job description, the EBIA Charter Petition, their PEP, and the California Standards for the Teaching Profession using the EBIA Teacher Evaluation Form
- Provide a lesson plan in advance of a formal observation lesson(s) with adequate time for Evaluator review and attend pre/post formal observation meetings.
- Adhere to timelines set in this process for improving areas identified for growth and take responsibility for corrective action.
- Have the right to attach a statement to any review.

##### Evaluator Will:

- Notify the unit member if evaluator is other than a site administrator by November 1<sup>st</sup>.
- Create a system for internally collecting ongoing evidence of teaching practice.
- Document findings of growth. Notify the unit member if an area of growth is observed and provide recommendations for support, which may include coaching, release time, classroom observations, or other resources.
- Notify the unit member promptly when deficiency (defined as “developing” or “ineffective” on Exhibit A) is observed.
- Provide a copy of the completed EBIA Teacher Evaluation Form to the unit member after each evaluation period.

All evaluations will typically include areas of strengths, weaknesses, and areas of concern supported by a collection of quantitative and qualitative measures including but not limited to benchmarks, coaching meetings, observations and contributions to the school community, where possible.

## 12.5 Correcting Deficiencies

In the case of negative observation(s), the evaluator shall take positive action to assist the unit member in correcting any cited deficiencies. The evaluator’s role is to assist the unit

member and shall include specific recommendations for improvement. It may also include direct assistance to implement such recommendations such as coaching, EBIA professional development in-service and other techniques to measure improvement such as implementation of an Instructional Improvement Program plan. Timelines and deliverables will be established and documented to monitor progress. Improvement plans shall be limited to no more than three (3) strands of growth, except in extenuating circumstances to no more than five (5) strands of growth.

## **12.6 Unit Member Participation**

Unit members shall not formally evaluate nor conduct formal evaluations of other unit members. However, unit members may observe and assist other unit members for the purpose of supporting the professional development of other unit members, and/or to improve their own teaching practice. Unit member involvement in the Instructional Improvement Program in this Article shall not constitute either management or supervisory functions.

## **12.7 Instructional Improvement Program Process**

### **12.7.1 Procedures**

A unit member may be required to participate in an improvement program if they have been observed as developing or ineffective, through either the formal observation or their PEP, as determined by the Head of School or designee.

### **12.7.2 Conditions of the Instructional Improvement Program**

1. No unit member shall be required to participate in an improvement program unless each of the following conditions has been met:
  - a. The unit member has been rated as being developing or ineffective during the evaluation process (as defined by this Article).
  - b. The unit member has been given notice that they shall be required to participate in an improvement program.
2. The following conditions shall govern the improvement program:
  - a. Refusal to participate may result in termination.
  - b. The nature of the program shall be developed by the evaluator following consultation with the unit member.
  - c. Release time shall be provided when required by the nature of the program or plan.

- d. The plan shall relate to the cause creating the overall unsatisfactory evaluation or observation, and/or to the elements of performance identified as needing improvement.
  - e. If the plan includes peer participation, the relationship between the participating unit member and their peer shall be confidential as it pertains to the evaluative process.
  - f. Upon the completion of the improvement program, the unit member shall be re-evaluated.
  - g. The plan shall not continue into the following school year, unless the plan resulted from the final observation/evaluation.
3. In the event a unit member volunteers or is requested to participate in another unit member's Instructional Improvement Program, the requested unit member's participation shall be voluntary.

## **12.8 Personnel Files Relating to Evaluations**

### **12.8.1 Right to Inspection**

Materials in personnel files of unit members which may serve as a basis for affecting the status of their employment through the evaluation process shall be available to those persons authorized by law to review such information, and upon written request, a copy of such materials shall be provided, except ratings, reports, or records which were obtained prior to the unit member's employment.

### **12.8.2 Procedures for Inspection**

Upon request, every unit member shall have the right to inspect such materials in the presence of the Head of School or designee, provided that the inspection shall occur at a time when such person is not actually required to be in the classroom.

### **12.8.3 Derogatory Material**

Information of a derogatory nature, defined as materials that may serve as a basis for affecting the status of a unit member's employment, except as allowed by law, shall not be entered or filed unless and until the unit member is given notice and an opportunity to review and comment thereon. A unit member shall have the right to attach a statement to any derogatory materials maintained in the unit member's employment file. Such review shall take place during normal business hours.

## **12.9 Confidentiality**

All information or proceeding regarding any action or proposed actions pursuant to this Article will be kept confidential by the parties to the extent permitted by law.

## **ARTICLE 13 – COMPLAINTS**

Parents or guardians of pupils enrolled in EBIA may present informal (oral) and/or formal (written) complaints regarding unit members to EBIA. Parents or guardians shall be encouraged to present informal (oral) complaints first with the unit member who is the subject of the complaint, or with that unit member’s immediate supervisor, prior to presenting any formal (written) complaint to EBIA whenever appropriate. Should the Head of School or designee receive complaints that trigger any mandatory reporting obligation, or that otherwise may legally require the involvement of law enforcement or other oversight bodies, the Head of School or designee may carry out any and all legal obligations of EBIA, and shall only be restricted in reporting in accordance with applicable law. Should EBIA investigate the complaint, the unit member shall be notified of the complaint (including to which outside/law enforcement agencies a report was made) and provided an opportunity to respond verbally and in writing. This article shall not be interpreted so as to constitute a waiver of Weingarten Rights.

### **13.1 Informal (Oral) Complaints**

- a. If the immediate supervisor or their designee receives a complaint against a unit member, the unit member shall be notified within a reasonable amount of time of the receipt of the complaint an attempt to resolve this complaint shall be made if the complaint is determined to be credible by the supervisor or designee.
- b. The unit member’s immediate supervisor or a designee shall conduct an inquiry/review of the complaint. Such inquiry/review may include a conference with the immediate supervisor or designee, the unit member, and the unit member’s representative if desired by the unit member. The complainant may be included in the conference.
- c. In the event that a conference between the immediate supervisor or their designee and the unit member does not resolve the problem, the complainant shall be requested to produce the complaint in writing or sign a dictated account of the complaint, dictated to the Head of Schools or designee. If the complainant refuses to produce the complaint in writing or via signed dictation, the complaint may be considered dropped, but this shall not interfere with EBIA’s right to investigate. If the complainant produces the complaint in writing, the procedures under formal written complaints shall be followed.
- d. Complaints not reported to the unit member under this section shall not be utilized in any evaluation or subsequent disciplinary action.

### **13.2 Formal (Written) Complaints**

EBIA shall notify unit members that a complaint has been filed against them within seven (7) workdays of receipt of the complaint. As part of the investigation process, EBIA shall forward to the unit member, any formal written complaint regarding that unit member. No record of any formal (written) complaint or the complaint itself shall be placed in the

personnel file of the unit member unless:

- a. The unit member's immediate supervisor or their designee investigates the complaint. Such investigation shall include a conference with the immediate supervisor or their designee, the unit member, and the unit member's representative if desired. The complainant may be included in the conference.
  - b. The immediate supervisor determines the complaint has merit and subsequently elects to take some form of progressive discipline against the unit member in accordance with this Agreement.
  - c. The unit member has been given prior notice of the formal (written) complaint, as well as a summary of the evidence involved, such that the unit member has reasonable opportunity [ten (10) calendar days] to present relevant information in writing to their immediate supervisor.
- 13.2.1 The unit member shall be informed that they have the right to attach a written statement to any complaint-related document placed in the personnel file of the unit member.
- 13.2.2 No record of any complaint shall be kept in a unit member's personnel file if an inquiry/review by EBIA shows that the complaint has no merit. No disciplinary or negative action shall occur as a result of an unsubstantiated complaint.
- 13.2.3 If, upon investigation by EBIA, the formal complaint is found to have merit, then any disciplinary action shall be handled according to the applicable legal requirements and the progressive discipline article of this agreement.

## ARTICLE 14 – CLASS SIZE

- 14.1 EBIA’s goal, budget permitting, is roughly a 25:1 student to teacher ratio in all core and elective classes for grades 6-12. For advisory and support classes, the student to teacher ratio may be as low as 15:1. Nevertheless, all unit member’s core/elective classes shall have a maximum class size average of 30 students, and all unit member’s advisory/support classes shall have a maximum class size average of 25 students.
- 14.2 If a unit member’s maximum class size average is exceeded, there will be a conference between the affected unit member and the Head of School. Through this dialogue, options will be discussed to remediate the issue, e.g., lower class sizes in other sections, instructional aide support, limited adjunct supervisory duties, additional curricular support materials, and other ideas which may come into the discussion. The Head of School shall also alert the Grade Level Team to solicit feedback regarding how best to support the affected unit member.
- 14.3 EBIA shall make every effort to meet the aforementioned class size goals. However, beyond budget/financial restrictions (with financial documentation substantiating the need for such budget/financial restrictions), the parties recognize that the accommodation of special programs/circumstances (i.e., Capstone, cross-curricular projects, etc.) may also warrant temporarily exceeding the stated class size goals.



## ARTICLE 15 – ASSIGNMENTS AND TRANSFERS

### 15.1 Definitions

- Transfer - A change from one work site to another without a change in classification (job title).
- Reassignment - A change from one position or classification to another without a change in work site.
- Voluntary transfer/reassignment - A unit member-initiated transfer/reassignment.
- Involuntary transfer/reassignment - A transfer initiated by EBIA.
- Vacancy - A position that is unfilled or unoccupied.

### 15.2 Assignments and Transfers

15.2.1 On or before May 1 of each school year, EBIA will distribute to all unit members a notice of intent to return. On or before May 15 of each school year, all bargaining unit members must sign a notice of intent to return in order to be assured an assignment with EBIA for the following school year. Failure to do so shall be deemed an automatic declining of continued employment with EBIA for the following school year.

15.2.2 The notice of intent to return may include a statement of preferred assignment for the following school year. Absent such a statement, the assumption is that the bargaining unit member desires to continue in their current assignment.

15.2.3 Assignments and transfers will be determined by EBIA by considering the following in priority order:

- a. Credential(s) held and experience;
- b. Evaluation(s);
- c. EBIA's educational program needs;
- d. Unit member's preference(s).

15.2.4 Unit members shall be notified of their final assignments for the next school year on or before the last day of instruction. Any unit members whose assignment changes over the summer recess shall be notified as soon as possible.

### 15.3 Vacancies

15.3.1 EBIA shall advertise/post all vacant positions on the EBIA website as they become available.

15.3.2 Notification of the vacancy will include the following:

- a. A closing date for internal candidates only which is at least seven (7) calendar days following the posting date;

- b. A job description; and
- c. Credentials and qualifications necessary to meet the requirements of the position.

15.3.3 Any unit member who wishes to be considered for a vacant position must submit a written request to the Head of School or designee.

15.3.4 EBIA shall, upon request of the unit member, deliver in writing the reason(s) that the unit member was not selected for the vacancy.

#### **15.4 Voluntary Reassignment or Transfer**

15.4.1 Unit members may apply in writing for voluntary reassignment/transfer at any time.

15.4.2 In filling a vacancy, EBIA shall consider the criteria outlined in 15.2.3 above.

#### **15.5 Involuntary Reassignment or Transfer**

An involuntary reassignment or transfer will be made only when it is in the best interest of the educational program of EBIA. The Head of School has discretion to determine who will be reassigned/transferred. Involuntary reassignments/transfers shall not be used for punitive purposes or in place of a proper performance review. The reason(s) for the involuntary reassignment or transfer shall be stated in writing and given to the unit member at least ten (10) days prior to the reassignment or transfer.

#### **15.6 Additional Sites**

Should EBIA open an additional site or sites, the parties shall negotiate the impacts/effects of such action consistent with applicable law.

#### **15.7 Dispute Resolution**

15.7.1 The timelines set forth in this Article are subject to the grievance procedures in this Agreement. The unit member filing the grievance bears the burden of proof to establish a violation.

15.7.2 The judgment of EBIA in making any decisions with respect to the matters set forth in this Article is not subject to the grievance procedure.

## **ARTICLE 16 – SAFETY**

### **16.1 Liability**

While EBIA is located in a public school facility, owned and managed by a local school district, EBIA agrees to report building and grounds issues timely to the school district for remediation. However, EBIA shall not be liable for the action or non-action of the facility owner or its agents with regard to the maintenance of the building and grounds, nor for injuries or damages that may arise from the condition of such building and grounds.

### **16.2 Written Report on Unsafe Conditions**

Unit members shall not be required to work under unsafe or hazardous conditions or to perform tasks that endanger their health or safety as determined by EBIA, and/or the appropriate state agency. Hazardous conditions that pose an immediate danger to employees will be a priority to repair. Each unit member shall be required to immediately report to the Head of School or designee, in writing, any conditions that may have a detrimental effect on the health, safety, or well-being of students, employees or other persons. Procedures for reporting and follow-up shall be determined by the Head of School or designee, reviewed at least annually by EBIA, and distributed to unit members each year by October 1st. The Head of School or designee will consider the written suggestions of ETA when determining the procedures for reporting under this section.

### **16.3 Immediate Report of Assault**

Unit members shall immediately report cases of assault suffered or witnessed by them in connection with their employment to the Head of School or designee who shall immediately report the incident to the police. The Head of School or designee shall release the employee from duty when they are required to make a statement to the police or appear in court in connection with the incident.

### **16.4 Pupil Suspension for Disciplinary Matters**

A unit member may recommend that a student be suspended from their class consistent with EBIA's suspension/expulsion policy, provided that the unit member documents notifying or attempting to notify the parent or guardian of the student the day of the disciplinary recommendation and immediately makes such recommendation to the Head of School or designee. When notified by a unit member of a recommendation for suspension, the Head of School or designee shall make their best efforts to address the recommendation immediately. In the event unit members are assigned to facilitate "in-house" suspension or restorative justice circles, such disbursements of "in-house" suspension or restorative justice circle students should be evenly assigned so no one unit member has the impact of a majority of students placed in the classroom. Consultation with unit members and all involved parties around student matters is expected and welcome, but to protect students against discrimination, retaliation, and any other manner of potentially inequitable treatment, the decision to suspend students in any manner is

solely at EBIA's discretion in accordance with the EBIA discipline policies and procedures.

## **16.5 Personal Safety**

### **16.5.1 Infections or Contagious Disease**

Unit members shall report any suspected infections or contagious disease that the unit member believes endangers their or another student or staff member's safety. Students suspected of having a contagious disease shall be sent to the school office. The unit member shall be notified regarding the nature of the suspected disease and the steps taken by the Head of School deemed necessary to protect the safety of the employee and students.

### **16.5.2 Dangerous Student Action**

Unit members who believe their safety, or the safety of other students or staff members, to be endangered by a student's actions should refer such student to the Head of School or designee. Prior to returning the student to that unit member's class, the Head of School or designee shall make all reasonable efforts to communicate with the teacher what action has been taken regarding the student and/or the rationale for returning the student to class.

### **16.5.3 Reasonable Physical Control**

In accordance with applicable law, a unit member may use reasonable physical control as is necessary to protect oneself from attack, to protect another person or property, to quell a disturbance threatening physical injury to others, or to obtain a dangerous object from the person.

## **16.6 Lockable Space**

Within six (6) months of ratification of the Agreement, EBIA shall provide unit members with a lockable space to store a bag or other small items. Such space could be, but is not required to be, a drawer in a locking file cabinet or desk.

## **16.7 Communication**

Each unit member will be provided with a working classroom communication system that is not dependent upon access to Wi-Fi (e.g., a walkie-talkie, classroom intercom system, or other manner of communication).

## **ARTICLE 17 – MISCELLANEOUS PROVISIONS**

### **17.1 No Strike – No Lockout**

There shall be no strike by employees or lockout by EBIA during the term of this Agreement.

### **17.2 Savings**

17.2.1 If any provision of this Agreement is held to be contrary to law by a court of competent jurisdiction, then such provisions shall not be deemed valid and subsisting, except to the extent permitted by law; but all other provisions or applications shall continue in full force and effect.

17.2.2 It is further agreed that within fifteen (15) days of receipt of notification of the court's decision, negotiations shall commence regarding matters related to such provision.

### **17.3 Statutory Changes**

17.3.1 Improvements in benefits included in this Agreement, which are brought about by applicable amendments or additions of statutory guarantees now provided in California or federal law to California charter schools, shall be incorporated into this Agreement.

17.3.2 Reduction or elimination of benefits which are brought about by the amendment or repeal of statutory guarantees incorporated into this Agreement shall obligate the parties within fifteen (15) working days of such amendment or repeal to negotiate whether or not such amendments or repeals shall be incorporated into this Agreement. Absent an agreement, no reduction or elimination of statutory guarantees of benefits included in this Agreement shall apply.

### **17.4 Maintenance of Standards**

17.4.1 EBIA shall not unilaterally reduce or eliminate any benefits or professional advantages, which were enjoyed by unit members as of the effective date of this Agreement.

17.4.2 The parties to this Agreement shall not interpret or apply this Agreement, any of its terms, or the work rules, which implement this Agreement in a manner that is inconsistent with applicable law and/or EERA regulations.

### **17.5 Modification or Waiver of Provisions**

17.5.1 The parties to this Agreement recognize that there may exist circumstances where specific modifications or waiver of provisions may be mutually deemed desirable.

Such agreements to modify or waive provisions shall be specific as to the provisions affected, set forth in writing, signed and dated by the parties.

## **17.6 Subcontracting**

17.6.1 The parties to this Agreement recognize that the duties and work performed by the bargaining unit described in Article 1 shall be performed only by unit members and shall not be subcontracted or otherwise transferred out of the bargaining unit.

## **17.7 Assignability**

This agreement is assignable, EBIA agrees that no merger, affiliation, change of affiliation, change of employer, or transfer of unit members shall occur without a guarantee and written agreement from any new, subsequent, or successor employer and that all provisions of the ETA/EBIA Agreement shall remain in full force and effect as a precondition of any such change, merger, or transfer, and that any new, subsequent, or successor employer shall be bound in every respect to the provisions of the ETA/EBIA Agreement.

### **17.7.1 Reasonable Involvement**

Other terms and conditions of the assignment of this Agreement shall be developed with reasonable involvement of ETA. Reasonable involvement shall be defined as providing for a meaningful exchange of proposals and counter proposals in writing. EBIA shall only take final action regarding other terms and conditions of the assignment of this Agreement after such involvement.

### **17.7.2 Dispute Resolution**

Should a dispute arise regarding this Article, the parties agree that no later than ninety (90) days following the filing of a grievance, the parties shall submit the dispute to expedited arbitration under the expedited rules of the American Arbitration Association. Pending final resolution of such and expedited arbitration, status quo regarding the terms and conditions of employment under the ETA/EBIA Agreement shall be maintained.

**ARTICLE 18 – TERM**

- 18.1 This Agreement shall remain in full force and effect up to and including June 30, 2020. For each year under the contract, in addition to Compensation and Benefits, each party may re-open two (2) articles of their choosing.
- 18.2 Any provisions of this Agreement that are not requested to be modified, amended or terminated as indicated in the parties' initial proposal presented for the new Agreement to be negotiated, shall remain in full force and effect and be automatically adopted and incorporated in the new Agreement.

### Appendix A

Step	Level 1	Level 2	Level 3	Level 4
1	\$50,000			
2	\$50,500			
3	\$51,005	\$53,000		
4	\$51,515	\$53,530	\$55,000	
5	\$52,030	\$54,065	\$55,550	
6	\$52,550	\$54,605	\$56,105	\$58,000
7	\$53,075	\$55,151	\$56,666	\$58,580
8	\$53,605	\$55,702	\$57,232	\$59,165
9	\$54,141	\$56,259	\$57,804	\$59,756
10	\$54,682	\$56,821	\$58,382	\$60,353
11	\$55,229	\$57,389	\$58,965	\$60,956
12	\$55,781	\$57,962	\$59,554	\$61,565
13	\$56,338	\$58,541	\$60,149	\$62,180
14	\$56,901	\$59,126	\$60,750	\$62,801
15	\$57,470	\$59,717	\$61,357	\$63,429
16	\$58,044	\$60,314	\$61,970	\$64,063
17	\$58,624	\$60,917	\$62,589	\$64,703
18	\$59,210	\$61,526	\$63,214	\$65,350
19	\$59,802	\$62,141	\$63,846	\$66,003
20	\$60,400	\$62,762	\$64,484	\$66,663
21	\$61,004	\$63,389	\$65,128	\$67,329
22	\$61,614	\$64,022	\$65,779	\$68,002
23	\$62,230	\$64,622	\$66,436	\$68,682
24	\$62,852	\$65,308	\$67,100	\$69,368
25	\$63,480	\$65,961	\$67,771	\$70,061
26	\$64,114	\$66,620	\$68,448	\$70,761
27	\$64,755	\$67,286	\$69,132	\$71,468
28	\$65,402	\$67,958	\$69,823	\$72,182
29	\$66,056	\$68,637	\$70,521	\$72,903
30	\$66,716	\$69,323	\$71,226	\$73,632



31	\$67,383	\$70,016	\$71,938	\$74,368
32	\$68,056	\$70,716	\$72,657	\$75,111
33	\$68,736	\$71,423	\$73,383	\$75,862
34	\$69,423	\$72,137	\$74,116	\$76,620
35	\$70,117	\$72,858	\$74,857	\$77,386
36	\$70,818	\$73,586	\$75,605	\$78,159
37	\$71,526	\$74,321	\$76,361	\$78,940
38	\$72,241	\$75,064	\$77,124	\$79,729
39	\$72,963	\$75,814	\$77,895	\$80,526
40	\$73,692	\$76,572	\$78,673	\$81,331
41	\$74,428	\$77,337	\$79,459	\$82,144
42	\$75,172	\$78,110	\$80,253	\$82,965
43	\$75,923	\$78,891	\$81,055	\$83,794
44	\$76,682	\$79,679	\$81,865	\$84,631
45	\$77,448	\$80,475	\$82,683	\$85,477
46	\$78,222	\$81,279	\$83,509	\$86,331
47	\$79,004	\$82,091	\$84,344	\$87,194
48	\$79,794	\$82,911	\$85,187	\$88,065
49	\$80,591	\$83,740	\$86,038	\$88,945
50	\$81,396	\$84,577	\$86,898	\$89,834

## **Appendix B**

### **BENEFITS SUMMARY**

## **Appendix C**

### **DEVELOPMENT CYCLE AND PROFESSIONAL DEVELOPMENT RUBRIC**

## **JUNE 2017 EBIA BOARD AGENDA ITEM III.C**

### East Bay Innovation Academy

**To:** Board of Directors  
East Bay Innovation Academy

**From:** David Hardin, Interim Head of School  
East Bay Innovation Academy

**Date:** June 12, 2017

**Re:** **Final Board Approval For EBIA/ETA Collective Bargaining Agreement**

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#### **Background**

East Bay Innovation Academy (“EBIA”) has negotiated a complete Collective Bargaining Agreement (“Agreement”) with the East Bay Innovation Academy Teachers Association (“ETA”) consistent with the requirements of the Educational Employment Relations Act.

The negotiated Agreement before the Board for final approval essentially codifies terms and conditions of employment for those employees working at EBIA who are represented by ETA.

The Agreement has been ratified by ETA, and is now before this Board for final approval.

I have attached a copy of the ETA-ratified Agreement to this report for reference.

#### **Certification**

This report shall also affirm that the EBIA Administration has reviewed the costs incurred by EBIA under the Agreement and hereby certify such costs can be met by EBIA during the term of the Agreement.

#### **Recommendation**

Recommendation to approve.

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David Hardin, Interim Head of School  
East Bay Innovation Academy

# Cover Sheet

## LCAP

**Section:** IV. Academic Excellence  
**Item:** B. LCAP  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** June 2017 - EBIA LCAP Briefing.pptx  
June 2017 - LCAP 2016 - 2017.pdf



# Year Four Planning Stakeholder Briefing

*Spring 2017*

# Can You Identify EBIA's Mission?

- A. To prepare a diverse student population for success in a four-year college or university, and to be thoughtful, contributing members of society.
- B. To develop and support innovative public schools where all students develop the academic, workplace, and citizenship skills for postsecondary success.
- C. To prepare a diverse group of students, who reflect the Oakland community, to be successful in college and to be thoughtful, engaged citizens who are leaders and innovators in a 21st century global world.

# Our mission

# Core beliefs

To prepare a **diverse** group of students, who reflect the **Oakland community**, to be **successful** in college and to be thoughtful, engaged **citizens** who are leaders and **innovators** in a 21st century global world.



Possibility & perseverance



Creativity & Curiosity



Community



Greater Good



Diversity



# EBIA Goals and Commitments

- #1** Provide and maintain basic services for students and school
- #2** Create a culture of caring and responsibility, where students feel safe and supported
- #3** Provide a coherent 21st century program that offers new, innovative and alternative educational experiences.
- #4** Provide students a rigorous, STEAM based, standards-aligned academic experience and increase the number of students making targeted growth in each core subject area
- #5** Maintain very high attendance to ensure school receives state money, via ADA, to succeed.

# Provide and maintain basic services for students and school

## Goal

## Measures

- Attract, hire and retain highly qualified teachers
  - Provide professional development and support to ensure effectiveness of all personnel
  - Ensure proper technology, is in place so that all students have access to technology
  - Provide equal course access to all students on a college preparatory track.
  - Ensure all grounds and facilities are safe and in good condition
- 100% of core academic teachers will be NCLB certified
  - 85% of faculty will be highly effective
  - 85% teacher satisfaction and demonstration survey
  - 100% compliance
  - 100% of student will be prepared to take A-G courses
  - 100% "Good" ratings on SARC

# Create a culture of caring and responsibility, where students feel safe and supported

## Goal

- Hire culturally competent staff that believes all students will achieve at the highest levels, valuing their many gifts, talents and attributes.
- Implement daily Morning Meeting and Advisory times to create a sense of community and to honor students embracing the Innovator Norms.
- Train and support all staff on positive school culture and discipline plan.

## Measures

- 100% compliant
- 90% of students report feeling “part of the EBIA community”
- 90% of students report feeling safe and supported on campus.
- <10% suspension rate.
- 85% of students score proficient or advanced on SEL rubric

# Provide a coherent 21st century program that offers new, innovative and alternative educational experiences.

## Goal

- Train all staff and students on design thinking principles and incorporate those principles in all phases of work.
- Students will be offered blended learning opportunities to access the curriculum in a personalized, differentiated approach.
- Students will demonstrate mastery of content materials through project-based learning.
- Students will collaborate, manage change and take ownership of their learning experiences.

## Measures

- 90% of students will be able to describe the principles of design thinking and how they've applied those principles to their work.
- Blended learning will be integrated into 30%-35% of the curriculum.
- All students will exhibit one culminating end-of-year summative project.
- 85% of students will successfully complete all goals in

Personalized Learning Plan

# Provide students a rigorous, STEAM based, standards-aligned academic experience and increase the number of students making targeted growth in each core subject area

## Goal

## Measures

- Develop and implement Common Core State Standards (ELA and Math) Sixth Generation Science Standards (6-8) and Next Generation Science Standards (9-12)
- Differentiate and personalize instruction to meet students' needs
- Develop standards-aligned benchmark assessments to inform instruction.
- Implement academic Response to Intervention (RTI) structure to address students' needs

- 50% of students will show growth in each core subject area
- 75% of students will perform at a level 3 or above on the EBA
- 70% of students will show growth on internal benchmark assessments
- 10% of students will show a 10% growth in each core subject area

# Maintain very high attendance to ensure EBIA receives state money, via ADA, to succeed.

## Goal

- Implement system for positive and/or perfect attendance.
- Communicate daily with families about student absences.
- Develop a strategic intervention system for students falling below 90% attendance rate.

## Measures

- Achieve 95% attendance rate

# Revenue: Enrollment & LCFF

**LCFF rate impacted by Unduplicated Count assumption;  
Enrollment biggest driver of revenue**

Variable	2016-17	2017-18	2018-19	2019-20
LCFF per ADA	<b>\$7,809</b>	<b>\$8,151</b>	<b>\$8,533</b>	<b>\$8,892</b>
Enrollment	<b><u>419</u></b> 6 <sup>th</sup> : 116 7 <sup>th</sup> : 118 8 <sup>th</sup> : 125 9 <sup>th</sup> : 60	<b><u>501</u></b> 6 <sup>th</sup> : 124 7 <sup>th</sup> : 124 8 <sup>th</sup> : 118 9 <sup>th</sup> : 70 10 <sup>th</sup> : 65	<b><u>607</u></b> 6 <sup>th</sup> : 124 7 <sup>th</sup> : 124 8 <sup>th</sup> : 124 9 <sup>th</sup> : 110 10 <sup>th</sup> : 65 11 <sup>th</sup> : 60	<b><u>722</u></b> 6 <sup>th</sup> : 124 7 <sup>th</sup> : 124 8 <sup>th</sup> : 124 9 <sup>th</sup> : 110 10 <sup>th</sup> : 110 11 <sup>th</sup> : 75 12 <sup>th</sup> : 60
ADA @ 95% (92% for 9-12)	<b>403.9</b>	<b>475.6</b>	<b>573.3</b>	<b>679.1</b>
Unduplicated Count	<b>90 (21%)</b>	<b>108 (21%)</b>	<b>131 (21%)</b>	<b>156 (21%)</b>

<sup>1</sup> Very preliminary assumption – may be modified based on early assessment of 17-18 student body

# Additional Community-Related Success Measures

- 90% Community satisfied with EBIA
- 75% of parents would recommend EBIA to other parents
- 90% of community members agree that the school is clean and orderly
- 75% of students able to identify EBIA's mission
- 50% of families able to identify EBIA's mission
- 75% of parents complete the annual survey
- 95% of parents will complete at least 5 hours of volunteering
- Significant Parental attendance at community meetings





LCAP Year  2017-18  2018-19  2019-20

# Local Control Accountability Plan and Annual Update (LCAP) Template

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

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

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

[LCFF Evaluation Rubrics](#): Essential data to support completion of this LCAP. Please analyze the LEA’s full data set; specific links to the rubrics are also provided within the template.

LEA Name	East Bay Innovation Academy		
Contact Name and Title	David Hardin Interim Head of School	Email and Phone	510-577-9557 info@eastbayia.org

## 2017-20 Plan Summary

### THE STORY

Briefly describe the students and community and how the LEA serves them.

In the 2016 – 2017 school year, East Bay Innovation Academy (“EBIA”) was in its 2nd year of operation and served grades 6 – 8. Last year, EBIA served approximately 360 students with each grade having roughly 120 students. This year, the 2017 – 2018 school year, EBIA expanded with an upper school serving approximately 65 9th graders. EBIA is one of the most racially, ethnically, and socioeconomically diverse student bodies in Oakland. For example last year, the student population was 31% Latino, 30% White, 18% African American, 15% Mixed Race, and 5% Asian. Our students come from every zip code in Oakland representing a diverse and multifaceted community.

EBIA wants to rethink how schools are run and structured, so that they better reflect the needs of a 21st century world. Most schools have not changed their structure, organization, facilities or instruction in many years. While schools have not changed, our world has, rendering many of our schools, even the “best” ones, obsolete. Both our instructional approach and our school composition will address needs of the 21st century and beyond. There are currently no high performing, heterogeneous schools in OUSD that focus on blended learning, personalized, project based/experiential learning or 21st century instruction. This is the focus of EBIA and how we strategically serve our diverse body of students.

### LCAP HIGHLIGHTS

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

This year’s LCAP has trended generally positive results on behalf of the students and the school. In terms of our measurable pupil outcomes, we met 4 out of 5 of the outcomes for goals 1 – 3. For goal 4, we met the measurable pupil outcome as well. Overall, EBIA has made progress towards providing all students with the basic services that they need to be successful. That said, there is still improvement to be made particularly as it pertains to educating all student sub groups at equitable levels and also increasing our preparedness for high school as measured by a-g.

## REVIEW OF PERFORMANCE

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

## GREATEST PROGRESS

The greatest area of progress is how EBIA has managed to provide and maintain basic services for students and the school. Specifically, this year we have been able to meet most of the annual measurable outcomes in this category. 100% of our core teachers were NCLB compliant, 88% of our teachers met their PEP goals, and we received 100% "good" ratings on the SARC. The successful completion of the majority of these goals suggest that EBIA is in fact meeting its goal of providing basic services for students and the school.

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

## GREATEST NEEDS

A point of improvement for EBIA is the percentage at which our students are prepared to take high school a-g courses. Last year, was our first year of operating with 8th grade students who were preparing to enter high school. As a result, we are now offering both Algebra 1 and Spanish in 8th grade. Moreover, we have increased our academic supports for students through blended learning programs such as Think Through Math.

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

## PERFORMANCE GAPS

One of the performance gaps that EBIA seeks to address is in relation to priority 4A, how students perform on state assessments. Overall, our students perform higher than the state average and the same is true for our subgroups. However, our low-income, Hispanic, and Black students only perform marginally better than the state average. For example, while 51% of our students were proficient overall, 28% of our Hispanic students, and 35% of our Black students were proficient. We are seeking to address this gap in future years.

## INCREASED OR IMPROVED SERVICES

If not previously addressed, identify the two to three most significant ways that the LEA will increase or improve services for low-income students, English learners, and foster youth.

East Bay Innovation will provide various structures to improve services for our low income, English learner, and foster youth. This year, we will utilize our independent learning time period to better target and provides supports for the aforementioned subgroups. One critical shift we are making in this area is as opposed to students being able to choose which teacher they will go to for ILT, students are now directed in accordance with their greatest need by teachers. This will result in these subgroups getting the targeted support time they need in order to be successful. Moreover, we have also initiated a summer school program that identifies students who have traditionally struggled and will help to provide an additional 4 weeks of remediation and acceleration in the subjects in which they need the most help.

## BUDGET SUMMARY

Complete the table below. LEAs may include additional information or more detail, including graphics.

### DESCRIPTION

### AMOUNT

Total General Fund Budget Expenditures for LCAP Year

\$5,252,077

Total Funds Budgeted for Planned Actions/Services to Meet the Goals in the LCAP for LCAP Year

\$560,903.00

The LCAP is intended to be a comprehensive planning tool but may not describe all General Fund Budget Expenditures. Briefly describe any of the General Fund Budget Expenditures specified above for the LCAP year not included in the LCAP.

While our LCAP covers many of our largest expenditures, it does not cover some of our general operating costs that are drawn from the general fund. For example, we pay for our facilities costs through the general fund and LCAP does not cover this expense. Special Education is another major general fund expense that is not cover in this LCAP. Other major expenses that are drawn from the general fund that are not covered in this LCAP are utilities and intercession.

\$3,876,091

Total Projected LCFF Revenues for LCAP Year

# Annual Update

LCAP Year Reviewed: 2016-17

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

<b>Goal 1</b>	Provide and maintain basic services for students and school.
State and/or Local Priorities Addressed by this goal:	STATE <input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input checked="" type="checkbox"/> 6 <input checked="" type="checkbox"/> 7 <input type="checkbox"/> 8 COE <input type="checkbox"/> 9 <input type="checkbox"/> 10 LOCAL

## ANNUAL MEASURABLE OUTCOMES

### EXPECTED

- 90% of core academic teachers will be NCLB compliant.
- 85% of faculty reaches Personal Education Plan goals.
- 85% teacher satisfaction on community survey.
- 95% of student will be prepared to take A-G courses in high school.
- 95% "Good" ratings on SARC.

### ACTUAL

- 100% of core academic teachers were NCLB compliant.
- 88% of faculty met their Personal Education Plan goals.
- N/A Teacher satisfaction results are not yet available.
- 69% of students were prepared to take A-G courses in high school.
- 100% "Good" ratings were achieved on the SARC.

## ACTIONS / SERVICES

Duplicate the Actions/Services from the prior year LCAP and complete a copy of the following table for each. Duplicate the table as needed.

<b>Action 1</b>					
Actions/Services	<table border="1"> <tr> <td style="background-color: #e6e6fa; text-align: center;"><b>PLANNED</b></td> <td style="background-color: #e6e6fa;">                     We have planned several structures to ensure that we have a professional development setting that delivers creative, personalized, and innovative learning experiences. As such we planned the following sub goals.                     <ul style="list-style-type: none"> <li>• Improve upon the practice of PBL</li> </ul> </td> </tr> <tr> <td style="background-color: #e6e6fa; text-align: center;"><b>ACTUAL</b></td> <td style="background-color: #e6e6fa;">                     In order to achieve the goal aforementioned, before the academic school year started we initiated a two-week, full day, professional development session to ensure that all staff was aligned and sufficiently trained to meet this goal. Moreover, we also implemented ongoing professional                 </td> </tr> </table>	<b>PLANNED</b>	We have planned several structures to ensure that we have a professional development setting that delivers creative, personalized, and innovative learning experiences. As such we planned the following sub goals. <ul style="list-style-type: none"> <li>• Improve upon the practice of PBL</li> </ul>	<b>ACTUAL</b>	In order to achieve the goal aforementioned, before the academic school year started we initiated a two-week, full day, professional development session to ensure that all staff was aligned and sufficiently trained to meet this goal. Moreover, we also implemented ongoing professional
<b>PLANNED</b>	We have planned several structures to ensure that we have a professional development setting that delivers creative, personalized, and innovative learning experiences. As such we planned the following sub goals. <ul style="list-style-type: none"> <li>• Improve upon the practice of PBL</li> </ul>				
<b>ACTUAL</b>	In order to achieve the goal aforementioned, before the academic school year started we initiated a two-week, full day, professional development session to ensure that all staff was aligned and sufficiently trained to meet this goal. Moreover, we also implemented ongoing professional				

	<ul style="list-style-type: none"> <li>Integrate the design thinking process into the curriculum</li> <li>Decrease the gap that exist in academic achievement in sub groups</li> </ul>	development throughout the year with an hour meeting each morning for grade level team meetings, content team meetings, and for continued development on our personalized/project based curriculum. We also allowed for 6 days of professional development during each semester during intercession.
Expenditures	<p><b>BUDGETED</b></p> <p>Professional Development \$24,405</p>	<p><b>ESTIMATED ACTUAL</b></p> <p>\$49,622</p>

Action **2**

Actions/Services	<p><b>PLANNED</b></p> <p>Ensure proper technology, is in place so that all students can access curriculum and demonstrate mastery of material digitally. Provide equal course access to all students on a college preparatory track.</p>	<p><b>ACTUAL</b></p> <p>We purchased chrome books for our incoming 6th grade class and replacements for broken chrome books for the 7th and 8th graders.</p>
Expenditures	<p><b>BUDGETED</b></p> <p>Student Chromebooks \$92,100 students plus 50% of 1st year computers replaced. \$400</p>	<p><b>ESTIMATED ACTUAL</b></p> <p>\$35,896</p>

Action **3**

Actions/Services	<p><b>PLANNED</b></p> <p>Provide equal course access to all students on a college preparatory track.</p>	<p><b>ACTUAL</b></p> <p>We purchased new computers for incoming staff and replaced computers that staff needed replaced. Moreover, we purchased a blended learning program that allows students to keep track of assignments and make up work.</p>
Expenditures	<p><b>BUDGETED</b></p> <p>staff tech needs. \$4,900</p>	<p><b>ESTIMATED ACTUAL</b></p> <p>\$14,368</p>

**ANALYSIS**

Complete a copy of the following table for each of the LEA’s goals from the prior year LCAP. Duplicate the table as needed.

Use actual annual measurable outcome data, including performance data from the LCFF Evaluation Rubrics, as applicable.

Describe the overall implementation of the actions/services to achieve the articulated goal.

Implemented ongoing teacher coaching to ensure that teachers met their goals  
 Implemented a program to help our teachers to earn their credential  
 More robust Algebra 1 program, Think through Math, Think Circa,  
 Problem based math curriculum based on skills  
 Moving towards shared rubrics and scaffolds

Describe the overall effectiveness of the actions/services to achieve the articulated goal as measured by the LEA.

We were able to hire 100% of our teachers in accordance with the NCLB standards through our program that allows our teachers to work with a BTSA coach. We also were able to attain 100% good rating on the SARC because of the implementation of the personalized learning curriculum mentioned above.

Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures.

A few of the costs in the goals went over while our projected cost for chromebooks was far less than anticipated. The primary reason for going over were that we had more technological issues than originally anticipated with our staff computer. We also had significantly less repair than anticipated for our 6th grade class as a result of moving to a cart model.

Describe any changes made to this goal, expected outcomes, metrics, or actions and services to achieve this goal as a result of this analysis and analysis of the LCFF Evaluation Rubrics, as applicable. Identify where those changes can be found in the LCAP.

N/A

# Annual Update LCAP Year Reviewed: 2016-17

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

<b>Goal 2</b>	Create a culture of caring and responsibility, where students feel safe and supported.
State and/or Local Priorities Addressed by this goal:	STATE <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input checked="" type="checkbox"/> 5 <input checked="" type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 COE <input type="checkbox"/> 9 <input type="checkbox"/> 10 LOCAL

## ANNUAL MEASURABLE OUTCOMES

### EXPECTED

- 100% compliant.
- 90% of students report felling “part of the EBIA community”.
- 90% of students report feeling safe and supported on campus.
- <10% suspension rate.
- 85% of students score proficient or advanced on SEL rubric..

### ACTUAL

- 100% compliant.
- 83% of students report felling “part of the EBIA community”.
- N/A of students report feeling safe and supported on campus.
- <10% suspension rate.
- N/A of students score proficient or advanced on SEL rubric

## ACTIONS / SERVICES

Duplicate the Actions/Services from the prior year LCAP and complete a copy of the following table for each. Duplicate the table as needed.

<b>Action</b>	<b>1</b>				
Actions/Services	<table border="1"> <tr> <td style="background-color: #d9ead3; width: 15%;"><b>PLANNED</b></td> <td style="background-color: #d9ead3;">Implement daily Morning Meeting and Advisory times to create a sense of community and to honor students embracing the Innovator Norms.</td> </tr> <tr> <td style="background-color: #d9ead3;"><b>ACTUAL</b></td> <td style="background-color: #d9ead3;">We did provide training for our DESEL in alignment with the National Equity Project. We also allotted 30 minutes a day for advisory and an hour of planning in the morning. We have implemented an advisory curriculum and working with our students on embracing the innovator norms.</td> </tr> </table>	<b>PLANNED</b>	Implement daily Morning Meeting and Advisory times to create a sense of community and to honor students embracing the Innovator Norms.	<b>ACTUAL</b>	We did provide training for our DESEL in alignment with the National Equity Project. We also allotted 30 minutes a day for advisory and an hour of planning in the morning. We have implemented an advisory curriculum and working with our students on embracing the innovator norms.
<b>PLANNED</b>	Implement daily Morning Meeting and Advisory times to create a sense of community and to honor students embracing the Innovator Norms.				
<b>ACTUAL</b>	We did provide training for our DESEL in alignment with the National Equity Project. We also allotted 30 minutes a day for advisory and an hour of planning in the morning. We have implemented an advisory curriculum and working with our students on embracing the innovator norms.				



Expenditures	<p><b>BUDGETED</b>                  Staff and DESEL and Director of Innovative Instruction establish curriculum for lesson planning and work collaboratively with staff to educate to the Innovator Norms and facilitate during Morning Meeting and Advisory. Teaching staff are trained during Professional Development days and DESEL attends conferences/workshops and trains teachers. \$5,600</p>	<p><b>ESTIMATED ACTUAL</b>                  \$4,904</p>
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Action **2**

Actions/Services	<p><b>PLANNED</b>                  Train and support all staff on positive school culture and discipline plan.</p>	<p><b>ACTUAL</b>                  Last year, we were able to establish a social emotional rubric and system for positive school culture and discipline. In the beginning of the year, our DESEL trained our staff on how to implement this.</p>
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Expenditures	<p><b>BUDGETED</b>                  train DESEL who in turn established curriculum and support and facilitates ongoing development and sustainability of school culture and discipline plan. The Director of Innovative Instruction performs this function at the High School. \$3,000</p>	<p><b>ESTIMATED ACTUAL</b>                  \$3,500</p>
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Action **3**

Actions/Services	<p><b>PLANNED</b>                  Teach social-emotional curriculum and embed it throughout all curricula.</p>	<p><b>ACTUAL</b>                  Our intercessions (which run one to two weeks after each trimester) this year helped to further establish our social emotional curriculum. For example this year, our students designed their own community service projects and reflected on them.</p>
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Expenditures	<p><b>BUDGETED</b>                  instructional materials previously accounted for in Section 3a, Goals 3 and 4 \$92,908</p>	<p><b>ESTIMATED ACTUAL</b>                  \$125,400</p>
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**ANALYSIS**

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

Use actual annual measurable outcome data, including performance data from the LCFF Evaluation Rubrics, as applicable.

Describe the overall implementation of the actions/services to achieve the articulated goal.

Overall, we have established a strong foundation for creating a culture of caring and responsibility through our increased attentiveness to SEL. Specifically, we have been able to further train and develop our DESEL and also our advisory program. We have allotted more time for SEL to occur in our school day and we also have developed frameworks and rubrics for our school wide discipline and positive culture plan.

Describe the overall effectiveness of the actions/services to achieve the articulated goal as measured by the LEA.

The implementation of establishing a caring and responsible student culture has been moderately successful. While we have made strides in our advisory curriculum, we are still working to further imbed this across the curriculum and also measure its impact.

Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures.

These costs were close to our budgeted expenditures.

Describe any changes made to this goal, expected outcomes, metrics, or actions and services to achieve this goal as a result of this analysis and analysis of the LCFF Evaluation Rubrics, as applicable. Identify where those changes can be found in the LCAP.

N/A

# Annual Update LCAP Year Reviewed: 2016-17

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

<b>Goal 3</b>	Provide a coherent 21st century program that offers new, innovative and alternative educational experiences.
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State and/or Local Priorities Addressed by this goal:

STATE	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	6	<input type="checkbox"/>	7	<input type="checkbox"/>	8
COE	<input type="checkbox"/>	9	<input type="checkbox"/>	10												
LOCAL																

## ANNUAL MEASURABLE OUTCOMES

### EXPECTED

- 90% of students will be able to describe the principles of design thinking and how they've applied those principles to their work.
- Blended Learning will be integrated into 30%-35% of the curriculum.
- All students will exhibit one culminating project at the end of the semester and at the end of the year.
- 85% of students will successfully complete all goals in Personalized Learning Plan.
- Students will make 5% targeted growth from beginning of year to end of year on established diagnostic.

### ACTUAL

- N/A% of students will be able to describe the principles of design thinking and how they've applied those principles to their work.
- Blended learning is integrated into 20%-30% of the curriculum.
- 100% of students exhibited one culminating project at the end of the semester and at the end of the year.
- 78% of students will successfully complete all goals in Personalized Learning Plan.
- N/A

## ACTIONS / SERVICES

Duplicate the Actions/Services from the prior year LCAP and complete a copy of the following table for each. Duplicate the table as needed.

<b>Action 1</b>		
Actions/Services	<b>PLANNED</b> Train all staff and students on design thinking principles and incorporate those principles in all phases of work.	<b>ACTUAL</b> Last year we increased our budget for design thinking. We have increased the amount of time our students are spending

		in the maker space and also how they are accessing project work during trimester projects and end of year capstones.
Expenditures	BUDGETED \$92,908	ESTIMATED ACTUAL \$130,392

Action **2**

Actions/Services	PLANNED Students will be offered blended learning opportunities to access the curriculum in a personalized, differentiated approach.	ACTUAL Last year, we fully integrated both Think Through Math and Achieve 3000 into our classrooms. Our students have been able to enhance their personalized time during their ILT time.
Expenditures	BUDGETED Included above. \$92,908	ESTIMATED ACTUAL Included above \$130,392

Action **3**

Actions/Services	PLANNED Students will collaborate, manage change and take ownership of their learning experiences.	ACTUAL In the upper school we allow for our students to choose which subject they need the most support in during ILT time. Moreover, students work in groups during capstone without a set schedule but rather a set of objectives and goals and then they work in the manner they see fit.
Expenditures	BUDGETED Included above.	ESTIMATED ACTUAL \$92,908 \$130,392

ANALYSIS

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

Use actual annual measurable outcome data, including performance data from the LCFF Evaluation Rubrics, as applicable.

Describe the overall implementation of the actions/services to achieve the articulated goal.

Last year, we were able to purchase personalize learning platforms that have allowed our students to be able to learn at their own pace in Math and English. We set aside time in our ILT periods for students to be able to do this work and get the acceleration or remediation that they need. We have also calendared the end of each semester to be able for students to work on end of trimester projects.

Describe the overall effectiveness of the actions/services to achieve the articulated goal as measured by the LEA.

Thus far, we have been able to further integrate the extent to which personalized learning is occurring in our school setting through the incorporation of our one to one computer ratio and also stronger software programs such as Think Through Math and Achieve 3000. Students have all also engaged in an end of semester projects as well as set personalized goals that they have worked towards. We have not yet been able to determine the extent to which students are able to describe design thinking in their work.

Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures.

If we were to purchase the edtec software, which we are not going to this year, we would have gone significantly over budget because the software is in addition to platforms we already had and therefore unanticipated.

Describe any changes made to this goal, expected outcomes, metrics, or actions and services to achieve this goal as a result of this analysis and analysis of the LCFF Evaluation Rubrics, as applicable. Identify where those changes can be found in the LCAP.

N/A

# Annual Update

LCAP Year Reviewed: 2016-17

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

Goal 4	Maintain very high attendance to ensure school receives state money, via ADA, to succeed.
State and/or Local Priorities Addressed by this goal:	STATE <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input checked="" type="checkbox"/> 5 <input checked="" type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 COE <input type="checkbox"/> 9 <input type="checkbox"/> 10 LOCAL

## ANNUAL MEASURABLE OUTCOMES

### EXPECTED

- Achieve 95% attendance rate.

### ACTUAL

- We achieved a 97.3% attendance rate at the Lower School.

## ACTIONS / SERVICES

Duplicate the Actions/Services from the prior year LCAP and complete a copy of the following table for each. Duplicate the table as needed.

Action <b>1</b>		
Actions/Services	<b>PLANNED</b> Implement system for positive and/or perfect attendance.	<b>ACTUAL</b> Implement system last year, we implemented a student of the week recognition. One of the factors considered is attendance and therefore or positive and/or perfect attendance.
Expenditures	<b>BUDGETED</b> Illuminate \$13,500	<b>ESTIMATED ACTUAL</b> \$20,103
Action <b>2</b>		
Actions/Services	<b>PLANNED</b> Communicate daily with families about student absences.	<b>ACTUAL</b> The SARB has helped to establish a system for calling anytime a student is absent. We also request letters for

<p>Expenditures</p>	<p>BUDGETED Included above.</p>	<p>students who may have excused absences for things like illness.</p> <p>ESTIMATED ACTUAL</p>
<p>Action <b>3</b></p>		
<p>Actions/Services</p>	<p>PLANNED Develop a strategic intervention system for students falling below 90% attendance rate.</p>	<p>ACTUAL This past year we initiated our SARB team. We have sent out letters for low attendance. We are looking to still further refine systems.</p>
<p>Expenditures</p>	<p>BUDGETED Included above.</p>	<p>ESTIMATED ACTUAL</p>

**ANALYSIS**

Complete a copy of the following table for each of the LEA’s goals from the prior year LCAP. Duplicate the table as needed.

Use actual annual measurable outcome data, including performance data from the LCFF Evaluation Rubrics, as applicable.

Describe the overall implementation of the actions/services to achieve the articulated goal.

EBIA has been able to implement various systems to ensure the continued high level of attendance rates. We have been able to establish a SARB and also are now communicating daily when students are absent.

Describe the overall effectiveness of the actions/services to achieve the articulated goal as measured by the LEA.

We have been able to continue to meet our goal of an attendance rate of over 95%. This has been because of the implementation of the actions of the SARB, our communication with parents, and by incentivizing of positive attendance.

Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures.

These costs were close to our budgeted expenditures.

Describe any changes made to this goal, expected outcomes, metrics, or actions and services to achieve this goal as a result of this analysis and analysis of the LCFF Evaluation Rubrics, as applicable. Identify where those changes can be found in the LCAP.

N/A



# Stakeholder Engagement

LCAP Year

 2017–18  2018–19  2019–20

## INVOLVEMENT PROCESS FOR LCAP AND ANNUAL UPDATE

How, when, and with whom did the LEA consult as part of the planning process for this LCAP/Annual Review and Analysis?

East Bay Innovation Academy has consulted with a wide variety of constituents in the planning process for this LCAP/Annual Review and Analysis. Specifically, we have:

1. Held parent meetings through our monthly "Cafelitos" (6/2)
2. Administered the Seneca School Climate Survey to parents, students, and staff (5/12)
3. Held staff meetings (6/2, 6/9)
4. Held ongoing board meetings

2015/2016 involvement reflected above.

## IMPACT ON LCAP AND ANNUAL UPDATE

How did these consultations impact the LCAP for the upcoming year?

These consultations have impacted us in the following ways:

1. We have delayed the purchasing of edtec software platforms and also adjusted the platforms we would have purchased in speaking with parents and teachers.
2. We have focused on further developing our social emotional curriculum so that we are able to increase the capacity of our at risk students to be able to function well.
3. We have worked to further enhance our professional development structure through the addition of teacher leadership positions such as Grade Level Team Leads.

2015/2016 involvement reflected above.

# Goals, Actions, & Services

## Strategic Planning Details and Accountability

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

New
  Modified
  Unchanged

### Goal 1

Provide and maintain basic services for students and school.

State and/or Local Priorities Addressed by this goal:

STATE  1  2  3  4  5  6  7  8  
 COE  9  10  
 LOCAL

Identified Need

High quality teaching staff and rigorous academic program

EXPECTED ANNUAL MEASURABLE OUTCOMES

Metrics/Indicators	Baseline	2017-18	2018-19	2019-20
<ul style="list-style-type: none"> <li>90% of core academic teachers will be NCLB compliant.</li> </ul>	<ul style="list-style-type: none"> <li>94.7% of core academic teachers are NCLB compliant.</li> </ul>	<ul style="list-style-type: none"> <li>90% of core academic teachers will be NCLB compliant.</li> <li>85% of faculty reaches Personal Educator Plan goals.</li> <li>85 % teacher satisfaction on community survey.</li> <li>95% of students will be prepared to take A-G courses in high school.</li> <li>95% "Good" ratings on SARC.</li> </ul>	<ul style="list-style-type: none"> <li>90% of core academic teachers will be NCLB compliant.</li> <li>85% of faculty reaches Personal Educator Plan goals.</li> <li>85 % teacher satisfaction on community survey.</li> <li>95% of students will be prepared to take A-G courses in high school.</li> <li>95% "Good" ratings on SARC.</li> </ul>	<ul style="list-style-type: none"> <li>90% of core academic teachers will be NCLB compliant.</li> <li>85% of faculty reaches Personal Educator Plan goals.</li> <li>85 % teacher satisfaction on community survey.</li> <li>95% of students will be prepared to take A-G courses in high school.</li> <li>95% "Good" ratings on SARC.</li> </ul>
<ul style="list-style-type: none"> <li>85% of faculty reaches Personal Educator Plan goals.</li> </ul>	<ul style="list-style-type: none"> <li>Not able to quantify % of faculty that has reached Personal Educator Plan goals until end of school year.</li> </ul>	<ul style="list-style-type: none"> <li>85% of faculty reaches Personal Educator Plan goals.</li> </ul>	<ul style="list-style-type: none"> <li>85% of faculty reaches Personal Educator Plan goals.</li> </ul>	<ul style="list-style-type: none"> <li>85% of faculty reaches Personal Educator Plan goals.</li> </ul>

• 85% teacher satisfaction on community survey.	• 93% teacher satisfaction on community survey.	• 85% teacher satisfaction on community survey.	• 85% teacher satisfaction on community survey.	• 85% teacher satisfaction on community survey.
• 95% of students will be prepared to take A-G courses in high school.	• 95% of students prepared to take A-G courses in high school.	• 95% of students will be prepared to take A-G courses in high school.	• 95% of students will be prepared to take A-G courses in high school.	• 95% of students will be prepared to take A-G courses in high school.
• 95% "Good" ratings on SARC.	• 100% for those metrics owned or influenced by the LEA.	• 95% "Good" ratings on SARC.	• 95% "Good" ratings on SARC.	• 95% "Good" ratings on SARC.

**PLANNED ACTIONS / SERVICES**

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

**Action 1**

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

Students to be Served  All  Students with Disabilities  [Specific Student Group(s)]

Location(s)  All Schools  Specific Schools:  Specific Grade spans:

OR

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

Students to be Served  English Learners  Foster Youth  Low Income

Scope of Services  LEA-wide  Schoolwide **OR**  Limited to Unduplicated Student Group(s)

Location(s)  All Schools  Specific Schools:  Specific Grade spans:

**ACTIONS/SERVICES**

**2017-18**

New  Modified  Unchanged

Provide professional development and support to ensure teaching staff delivers creative, personalized and innovative learning experiences to all students.

**2018-19**

New  Modified  Unchanged

Provide professional development and support to ensure teaching staff delivers creative, personalized and innovative learning experiences to all students.

**2019-20**

New  Modified  Unchanged

Provide professional development and support to ensure teaching staff delivers creative, personalized and innovative learning experiences to all students.

**BUDGETED EXPENDITURES**

**2017-18**

Amount 25,613

Budget Reference Professional Development

**2018-19**

Amount 26,431

Budget Reference Professional Development

**2019-20**

Amount 26,690

Budget Reference Professional Development

Action **2**

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

[Students to be Served](#)  All  Students with Disabilities  [\[Specific Student Group\(s\)\]](#)

[Location\(s\)](#)  All Schools  Specific Schools:  Specific Grade spans:

OR

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

[Students to be Served](#)  English Learners  Foster Youth  Low Income

[Scope of Services](#)  LEA-wide  Schoolwide **OR**  Limited to Unduplicated Student Group(s)

[Location\(s\)](#)  All Schools  Specific Schools:  Specific Grade spans:

**ACTIONS/SERVICES**

**2017-18**

New  Modified  Unchanged

Ensure proper technology is in place so that all students can access curriculum and demonstrate mastery of material digitally.

**2018-19**

New  Modified  Unchanged

Ensure proper technology is in place so that all students can access curriculum and demonstrate mastery of material digitally.

**2019-20**

New  Modified  Unchanged

Ensure proper technology is in place so that all students can access curriculum and demonstrate mastery of material digitally.

**BUDGETED EXPENDITURES**

**2017-18**

Amount 58000

**2018-19**

Amount 71,677

**2019-20**

Amount 86,962

Budget Reference

student Chromebooks-100 machines for new students and 50% of 1st year computers replaced

Budget Reference

student Chromebooks-100 total and 50% 2nd year computers replaced.

Budget Reference

*(Empty Budget Reference box)*

**Action 3**

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

Students to be Served  All  Students with Disabilities  [Specific Student Group(s)]

Location(s)  All Schools  Specific Schools:  Specific Grade spans:

OR

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

Students to be Served  English Learners  Foster Youth  Low Income

Scope of Services  LEA-wide  Schoolwide **OR**  Limited to Unduplicated Student Group(s)

Location(s)  All Schools  Specific Schools:  Specific Grade spans:

ACTIONS/SERVICES

**2017-18**

New  Modified  Unchanged

Provide equal course access to all students on a college preparatory track.

**2018-19**

New  Modified  Unchanged

Provide equal course access to all students on a college preparatory track.

**2019-20**

New  Modified  Unchanged

Provide equal course access to all students on a college preparatory track.

BUDGETED EXPENDITURES

**2017-18**

Amount 8,500

Budget Reference staff tech needs

**2018-19**

Amount 15,000

Budget Reference staff tech needs

**2019-20**

Amount 15,000

Budget Reference staff tech needs

# Goals, Actions, & Services

## Strategic Planning Details and Accountability

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

New
  Modified
  Unchanged

### Goal 2

Create a culture of caring and responsibility, where students feel safe and supported.

State and/or Local Priorities Addressed by this goal:

STATE  1  2  3  4  5  6  7  8  
 COE  9  10  
 LOCAL

Identified Need

Positive and safe school culture and climate.

EXPECTED ANNUAL MEASURABLE OUTCOMES

Metrics/Indicators	Baseline	2017-18	2018-19	2019-20
<ul style="list-style-type: none"> <li>100% compliant.</li> </ul>	<ul style="list-style-type: none"> <li>100% compliant.</li> </ul>	<ul style="list-style-type: none"> <li>100% compliant.</li> </ul>	<ul style="list-style-type: none"> <li>100% compliant.</li> <li>90% of students report feeling "part of the EBIA community".</li> <li>90% of students report feeling safe and supported on campus.</li> <li>&lt;10% suspension rate.</li> <li>85% of students score proficient or advanced on SEL rubric.</li> </ul>	<ul style="list-style-type: none"> <li>100% compliant.</li> </ul>
- 90% of students report feeling "part of the EBIA community".	• 83% of students report feeling "part of the EBIA community".	- 90% of students report feeling "part of the EBIA community".	- 90% of students report feeling "part of the EBIA community".	- 90% of students report feeling "part of the EBIA community".
- 90% of students report feeling safe and supported on campus.	• N/A of students report feeling safe and supported on campus.	- 90% of students report feeling safe and supported on campus.	- 90% of students report feeling safe and supported on campus.	- 90% of students report feeling safe and supported on campus.
- <10% suspension rate.	• <10% suspension rate.	- <10% suspension rate.	- <10% suspension rate.	- <10% suspension rate.

- 85% of students score proficient or advanced on SEL rubric.

N/A of students score proficient or advanced on SEL rubric

- 85% of students score proficient or advanced on SEL rubric.

- 85% of students score proficient or advanced on SEL rubric.

- 85% of students score proficient or advanced on SEL rubric.

**PLANNED ACTIONS / SERVICES**

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

**Action 1**

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

<u>Students to be Served</u>	<input checked="" type="checkbox"/> All	<input type="checkbox"/> Students with Disabilities	<input type="checkbox"/> [Specific Student Group(s)]
<u>Location(s)</u>	<input type="checkbox"/> All Schools	<input type="checkbox"/> Specific Schools:	<input type="checkbox"/> Specific Grade spans:

OR

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

<u>Students to be Served</u>	<input type="checkbox"/> English Learners	<input type="checkbox"/> Foster Youth	<input type="checkbox"/> Low Income
<u>Scope of Services</u>	<input type="checkbox"/> LEA-wide	<input type="checkbox"/> Schoolwide	<b>OR</b> <input type="checkbox"/> Limited to Unduplicated Student Group(s)
<u>Location(s)</u>	<input type="checkbox"/> All Schools	<input type="checkbox"/> Specific Schools:	<input type="checkbox"/> Specific Grade spans:

**ACTIONS/SERVICES**

**2017-18**

New  Modified  Unchanged

Implement daily Morning Meeting and Advisory times to create a sense of community and to honor students embracing the Innovator norms.

**2018-19**

New  Modified  Unchanged

Implement daily Morning Meeting and Advisory times to create a sense of community and to honor students embracing the Innovator norms.

**2019-20**

New  Modified  Unchanged

Implement daily Morning Meeting and Advisory times to create a sense of community and to honor students embracing the Innovator norms.

**BUDGETED EXPENDITURES**

**2017-18**

Amount \$7,097

**2018-19**

Amount \$8,965

**2019-20**

Amount 11,324

**Budget Reference**  
 Staff and DESEL and Director of Innovative Instruction establish curriculum for lesson planning and work collaboratively with staff to educate to the Innovator Norms and facilitate during Morning Meeting and Advisory. Teaching staff are trained during Professional Development days and DESEL attends conferences/workshops and trains teachers.

**Budget Reference**  
 Staff and DESEL and Director of Innovative Instruction establish curriculum for lesson planning and work collaboratively with staff to educate to the Innovator Norms and facilitate during Morning Meeting and Advisory. Teaching staff are trained during Professional Development days and DESEL attends conferences/workshops and trains teachers.

**Budget Reference**  
 Staff and DESEL and Director of Innovative Instruction establish curriculum for lesson planning and work collaboratively with staff to educate to the Innovator Norms and facilitate during Morning Meeting and Advisory. Teaching staff are trained during Professional Development days and DESEL attends conferences/workshops and trains teachers.

**Action 2**

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

[Students to be Served](#)  All  Students with Disabilities  [\[Specific Student Group\(s\)\]](#)

[Location\(s\)](#)  All Schools  Specific Schools:  Specific Grade spans:

OR

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

[Students to be Served](#)  English Learners  Foster Youth  Low Income

[Scope of Services](#)  LEA-wide  Schoolwide **OR**  Limited to Unduplicated Student Group(s)

[Location\(s\)](#)  All Schools  Specific Schools:  Specific Grade spans:

**ACTIONS/SERVICES**

**2017-18**

New  Modified  Unchanged

Train and support all staff on positive school culture and discipline plan.

**2018-19**

New  Modified  Unchanged

Train and support all staff on positive school culture and discipline plan.

**2019-20**

New  Modified  Unchanged

**BUDGETED EXPENDITURES**



2017-18	2018-19	2019-20
Amount: \$3,821	Amount: \$4,827	Amount: \$6,097
Budget Reference: train DESEL who in turn established curriculum and support and facilitates ongoing development and sustainability of school culture and discipline plan. The Director of Innovative Instruction performs this function at the High School.	Budget Reference: train DESEL who in turn established curriculum and support and facilitates ongoing development and sustainability of school culture and discipline plan. The Director of Innovative Instruction performs this function at the High School.	Budget Reference: train DESEL who in turn established curriculum and support and facilitates ongoing development and sustainability of school culture and discipline plan. The Director of Innovative Instruction performs this function at the High School.

Action **3**

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

[Students to be Served](#)  All  Students with Disabilities  [Specific Student Group(s)]

[Location\(s\)](#)  All Schools  Specific Schools:  Specific Grade spans:

OR

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

[Students to be Served](#)  English Learners  Foster Youth  Low Income

[Scope of Services](#)  LEA-wide  Schoolwide **OR**  Limited to Unduplicated Student Group(s)

[Location\(s\)](#)  All Schools  Specific Schools:  Specific Grade spans:

ACTIONS/SERVICES

2017-18	2018-19	2019-20
<input type="checkbox"/> New <input type="checkbox"/> Modified <input type="checkbox"/> Unchanged	<input type="checkbox"/> New <input type="checkbox"/> Modified <input type="checkbox"/> Unchanged	<input type="checkbox"/> New <input type="checkbox"/> Modified <input type="checkbox"/> Unchanged
Teach social-emotional curriculum and embed it throughout curricula.	Teach social-emotional curriculum and embed it throughout curricula.	Teach social-emotional curriculum and embed it throughout curricula.

BUDGETED EXPENDITURES

<b>2017-18</b>		<b>2018-19</b>		<b>2019-20</b>	
Amount	\$68,779	Amount	\$130,137	Amount	\$157,886
Budget Reference	instructional materials previously accounted for in Section 3a, Goals 3 and 4	Budget Reference	instructional materials previously accounted for in Section 3a, Goals 3 and 4	Budget Reference	instructional materials previously accounted for in Section 3a, Goals 3 and 4

# Goals, Actions, & Services

## Strategic Planning Details and Accountability

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

New
  Modified
  Unchanged

### Goal 3

Provide a coherent 21st century program that offers new, innovative and alternative educational experiences.

State and/or Local Priorities Addressed by this goal:

STATE  1  2  3  4  5  6  7  8  
 COE  9  10  
 LOCAL

Identified Need

Alignment of mission and vision to school program implementation.

### EXPECTED ANNUAL MEASURABLE OUTCOMES

Metrics/Indicators	Baseline	2017-18	2018-19	2019-20
- 90% of students will be able to describe the principles of design thinking and how they've applied those principles to their work.	• Not able to quantify until end of school year the % of students able to describe the principles of design thinking and how they've applied those principles to their work.	- 90% of students will be able to describe the principles of design thinking and how they've applied those principles to their work.	• 90% of students will be able to describe the principles of design thinking and how they've applied those principles to their work.	- 90% of students will be able to describe the principles of design thinking and how they've applied those principles to their work.
- Blended Learning will be integrated into 30%-35% of the curriculum.	• Blended learning is integrated into 40% of the curriculum.	- Blended Learning will be integrated into 30%-35% of the curriculum.	- Blended Learning will be integrated into 30%-35% of the curriculum.	- Blended Learning will be integrated into 30%-35% of the curriculum.
- All students will exhibit one culminating project at the end of the semester and at the end of the year.	• By the end of the school year, students will have exhibited at least two culminating projects.	- All students will exhibit one culminating project at the end of the semester and at the end of the year.	- All students will exhibit one culminating project at the end of the semester and at the end of the year.	- All students will exhibit one culminating project at the end of the semester and at the end of the year.
- 85% of students will successfully complete all goals in Personalized Learning Plan.	• 75% of students are on track to successfully complete all goals in their Personalized	- 85% of students will successfully complete all goals in Personalized Learning Plan.	- 85% of students will successfully complete all goals in Personalized Learning Plan.	- 85% of students will successfully complete all goals in Personalized Learning Plan.
- Students will make 5% targeted growth from beginning	N/A	- Students will make 5% targeted growth from beginning	- Students will make 5% targeted growth from beginning	- Students will make 5% targeted growth from beginning

of year to end of year on established diagnostic.

of year to end of year on established diagnostic.

of year to end of year on established diagnostic.

of year to end of year on established diagnostic.

**PLANNED ACTIONS / SERVICES**

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

**Action 1**

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

<u>Students to be Served</u>	<input checked="" type="checkbox"/> All	<input type="checkbox"/> Students with Disabilities	<input type="checkbox"/> <u>[Specific Student Group(s)]</u>
<u>Location(s)</u>	<input type="checkbox"/> All Schools	<input type="checkbox"/> Specific Schools:	<input type="checkbox"/> Specific Grade spans:

OR

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

<u>Students to be Served</u>	<input type="checkbox"/> English Learners	<input type="checkbox"/> Foster Youth	<input type="checkbox"/> Low Income
<u>Scope of Services</u>	<input type="checkbox"/> LEA-wide	<input type="checkbox"/> Schoolwide	OR <input type="checkbox"/> Limited to Unduplicated Student Group(s)
<u>Location(s)</u>	<input type="checkbox"/> All Schools	<input type="checkbox"/> Specific Schools:	<input type="checkbox"/> Specific Grade spans:

**ACTIONS/SERVICES**

**2017-18**

New  Modified  Unchanged

Train all staff and students on design thinking principles and incorporate those principles in all phases of work.

**2018-19**

New  Modified  Unchanged

Train all staff and students on design thinking principles and incorporate those principles in all phases of work.

**2019-20**

New  Modified  Unchanged

Train all staff and students on design thinking principles and incorporate those principles in all phases of work.

**BUDGETED EXPENDITURES**

**2017-18**

Amount \$113,277

**2018-19**

Amount \$153,643

**2019-20**

Amount \$208,393

**Action 2**

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

Students to be Served  All  Students with Disabilities  [Specific Student Group(s)]

Location(s)  All Schools  Specific Schools:  Specific Grade spans:

OR

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

Students to be Served  English Learners  Foster Youth  Low Income

Scope of Services  LEA-wide  Schoolwide **OR**  Limited to Unduplicated Student Group(s)

Location(s)  All Schools  Specific Schools:  Specific Grade spans:

ACTIONS/SERVICES

**2017-18**

New  Modified  Unchanged

Students will be offered blended learning opportunities to access the curriculum in a personalized, differentiated approach

**2018-19**

New  Modified  Unchanged

Students will be offered blended learning opportunities to access the curriculum in a personalized, differentiated approach

**2019-20**

New  Modified  Unchanged

Students will be offered blended learning opportunities to access the curriculum in a personalized, differentiated approach

BUDGETED EXPENDITURES

**2017-18**

Amount \$92,908

Budget Reference Included above.

**2018-19**

Amount \$113,227

Budget Reference Included above.

**2019-20**

Amount \$153,643

Budget Reference Included above.

Action **3**

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

Students to be Served  All  Students with Disabilities  [Specific Student Group(s)]

Location(s)

All Schools     Specific Schools: \_\_\_\_\_     Specific Grade spans: \_\_\_\_\_

OR

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

Students to be Served

English Learners     Foster Youth     Low Income

Scope of Services

LEA-wide     Schoolwide    **OR**     Limited to Unduplicated Student Group(s)

Location(s)

All Schools     Specific Schools: \_\_\_\_\_     Specific Grade spans: \_\_\_\_\_

**ACTIONS/SERVICES**

**2017-18**

New     Modified     Unchanged

Students will collaborate, manage change and take ownership of their learning experiences.

**2018-19**

New     Modified     Unchanged

Students will collaborate, manage change and take ownership of their learning experiences.

**2019-20**

New     Modified     Unchanged

Students will collaborate, manage change and take ownership of their learning experiences.

**BUDGETED EXPENDITURES**

**2017-18**

Amount    \$92,908

Budget Reference    Included above.

**2018-19**

Amount    \$113,227

Budget Reference    Included above.

**2019-20**

Amount    \$153,643

Budget Reference    Included above.

# Goals, Actions, & Services

## Strategic Planning Details and Accountability

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

New
  Modified
  Unchanged

### Goal 4

Maintain very high attendance to ensure school receives state money, via ADA, to succeed.

State and/or Local Priorities Addressed by this goal:

STATE  1  2  3  4  5  6  7  8  
 COE  9  10  
 LOCAL

Identified Need

Consistent attendance from all student subpopulations.

EXPECTED ANNUAL MEASURABLE OUTCOMES

Metrics/Indicators	Baseline	2017-18	2018-19	2019-20
- Achieve 95% attendance rate.	Achieved a 96% attendance rate.	- Achieve 95% attendance rate.	- Achieve 95% attendance rate.	- Achieve 95% attendance rate.

PLANNED ACTIONS / SERVICES

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

Action **1**

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

Students to be Served  All  Students with Disabilities  [Specific Student Group(s)]

Location(s)  All Schools  Specific Schools:  Specific Grade spans:

OR

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

[Students to be Served](#)  English Learners  Foster Youth  Low Income

[Scope of Services](#)  LEA-wide  Schoolwide **OR**  Limited to Unduplicated Student Group(s)

[Location\(s\)](#)  All Schools  Specific Schools:  Specific Grade spans:

**ACTIONS/SERVICES**

**2017-18**

New  Modified  Unchanged

Implement system for positive and/or perfect attendance.

**2018-19**

New  Modified  Unchanged

Implement system for positive and/or perfect attendance.

**2019-20**

New  Modified  Unchanged

Implement system for positive and/or perfect attendance.

**BUDGETED EXPENDITURES**

**2017-18**

Amount \$30,000

Budget Reference Illuminate

**2018-19**

Amount \$30,600

Budget Reference Illuminate

**2019-20**

Amount \$31,212

Budget Reference Illuminate

Action **2**

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

[Students to be Served](#)  All  Students with Disabilities  [Specific Student Group(s)]

[Location\(s\)](#)  All Schools  Specific Schools:  Specific Grade spans:

**OR**

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

[Students to be Served](#)  English Learners  Foster Youth  Low Income

[Scope of Services](#)  LEA-wide  Schoolwide **OR**  Limited to Unduplicated Student Group(s)



[Location\(s\)](#)  All Schools  Specific Schools:  Specific Grade spans:

**ACTIONS/SERVICES**

**2017-18**

New  Modified  Unchanged

Communicate daily with families about student absences.

**2018-19**

New  Modified  Unchanged

Communicate daily with families about student absences.

**2019-20**

New  Modified  Unchanged

Communicate daily with families about student absences.

**BUDGETED EXPENDITURES**

**2017-18**

Amount

Budget Reference

**2018-19**

Amount

Budget Reference

**2019-20**

Amount

Budget Reference

Action **3**

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

[Students to be Served](#)  All  Students with Disabilities  [Specific Student Group(s)]

[Location\(s\)](#)  All Schools  Specific Schools:  Specific Grade spans:

**OR**

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

[Students to be Served](#)  English Learners  Foster Youth  Low Income

[Scope of Services](#)  LEA-wide  Schoolwide **OR**  Limited to Unduplicated Student Group(s)

[Location\(s\)](#)  All Schools  Specific Schools:  Specific Grade spans:

ACTIONS/SERVICES

**2017-18**

New  Modified  Unchanged

Develop a strategic intervention system for students falling below 90% attendance rate.

**2018-19**

New  Modified  Unchanged

Develop a strategic intervention system for students falling below 90% attendance rate.

**2019-20**

New  Modified  Unchanged

Develop a strategic intervention system for students falling below 90% attendance rate.

BUDGETED EXPENDITURES

**2017-18**

Amount \$30,000

Budget Reference Included above.

**2018-19**

Amount \$30,600

Budget Reference Included above.

**2019-20**

Amount \$31,212

Budget Reference (included above)

## Demonstration of Increased or Improved Services for Unduplicated Pupils

LCAP Year  2017-18  2018-19  2019-20

Estimated Supplemental and Concentration Grant Funds: \$118,515

Percentage to Increase or Improve Services: 3.15%

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

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

Current year estimated supplemental and concentration grant funding in the LCAP year. EBIA works to support low income, foster youth and English learner pupils in a number of ways. First, all students in these subpopulations are paired with an advisory with whom they will loop up across grades 6-12. These advisors receive professional development in executing a social emotional learning curriculum that develops communication, collaboration, self-directed learning and growth mindset in students. Further, these advisors work with student families to ensure the academic and social emotional learning success of all students. They meet regularly with families and work with students to develop a personalized learning plan that includes college and career readiness skills. Academically, EBIA supports an inclusion model of differentiated instruction to ensure that students who enter at instructional levels across the K-12 spectrum are able to be academically supported and challenged while ensuring they remain a part of the general education classroom. EBIA use of blended learning platforms such as Accelerated Math, Google Apps for Education and Curriculet personalize learning to support language acquisition for English learners, and the cloud-based blended learning tools offer easily accessible academic support for students in transitional housing.

## **Revised Local Control and Accountability Plan and Annual Update Template Instructions**

### **Addendum**

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

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

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

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

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

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

## Instructions: Linked Table of Contents

[Plan Summary](#)

[Annual Update](#)

[Stakeholder Engagement](#)

[Goals, Actions, and Services](#)

[Planned Actions/Services](#)

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

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

## Plan Summary

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

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

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

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

The reference to LCFF Evaluation Rubrics means the evaluation rubrics adopted by the State Board of Education under *EC* Section 52064.5.

## Budget Summary

The LEA must complete the LCAP Budget Summary table as follows:

- **Total LEA General Fund Budget Expenditures for the LCAP Year:** This amount is the LEA's total budgeted General Fund expenditures for the LCAP year. The LCAP year means the fiscal year for which an LCAP is adopted or updated by July 1. The General Fund is the main operating fund of the LEA and accounts for all activities not accounted for in another fund. All activities are reported in the General Fund unless there is a compelling reason to account for an activity in another fund. For further information please refer to the *California School Accounting Manual* (<http://www.cde.ca.gov/fg/ac/sa/>). (Note: For some charter schools that follow governmental fund accounting, this amount is the total budgeted expenditures in the Charter Schools Special Revenue Fund. For charter schools that follow the not-for-profit accounting model, this amount is total budgeted expenses, such as those budgeted in the Charter Schools Enterprise Fund.)
- **Total Funds Budgeted for Planned Actions/Services to Meet the Goals in the LCAP for the LCAP Year:** This amount is the total of the budgeted expenditures associated with the actions/services included for the LCAP year from all sources of funds, as reflected in the LCAP. To the extent actions/services and/or expenditures are listed in the LCAP under more than one goal, the expenditures should be counted only once.
- **Description of any use(s) of the General Fund Budget Expenditures specified above for the LCAP year not included in the LCAP:** Briefly describe expenditures included in total General Fund Expenditures that are not included in the total funds budgeted for planned actions/services for

the LCAP year. (Note: The total funds budgeted for planned actions/services may include funds other than general fund expenditures.)

- **Total Projected LCFF Revenues for LCAP Year:** This amount is the total amount of LCFF funding the LEA estimates it will receive pursuant to *EC* sections 42238.02 (for school districts and charter schools) and 2574 (for county offices of education), as implemented by *EC* sections 42238.03 and 2575 for the LCAP year respectively.

### Annual Update

The planned goals, expected outcomes, actions/services, and budgeted expenditures must be copied verbatim from the previous year's\* approved LCAP. Minor typographical errors may be corrected.

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

### Annual Measurable Outcomes

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

### Actions/Services

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

### Analysis

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

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

### Stakeholder Engagement

Meaningful engagement of parents, students, and other stakeholders, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Education Code identifies the minimum consultation requirements for school districts and county offices of education as consulting with teachers, principals, administrators, other school personnel, local bargaining units of the school district, parents, and pupils in developing the LCAP. Education Code requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and pupils in developing the LCAP. In addition, Education Code Section 48985 specifies the requirements for the translation of notices, reports, statements, or records sent to a parent or guardian.

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

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

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

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

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

## Goals, Actions, and Services

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

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

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

## **New, Modified, Unchanged**

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

## Goal

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

## Related State and/or Local Priorities

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

## Identified Need

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

### **Expected Annual Measurable Outcomes**

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

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

### **Planned Actions/Services**

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

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

##### **Students to be Served**

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

##### **Location(s)**

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

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

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

##### **Students to be Served**

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

##### **Scope of Service**



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

- If the action/service is being funded and provided to upgrade the entire educational program of the LEA, place a check mark next to “LEA-wide.”
- If the action/service is being funded and provided to upgrade the entire educational program of a particular school or schools, place a check mark next to “schoolwide”.
- If the action/service being funded and provided is limited to the unduplicated students identified in “Students to be Served”, place a check mark next to “Limited to Student Groups”.

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

### Location(s)

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

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

### Actions/Services

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

#### **New/Modified/Unchanged:**

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

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

**Charter schools** may complete the LCAP to align with the term of the charter school’s budget that is submitted to the school’s authorizer. Accordingly, a charter school submitting a one-year budget to its authorizer may choose not to complete the year 2 and year 3 portions of the Goals, Actions, and

Services section of the template. If year 2 and/or year 3 is not applicable, charter schools must specify as such.

### Budgeted Expenditures

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

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

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

### Demonstration of Increased or Improved Services for Unduplicated Students

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

#### Estimated Supplemental and Concentration Grant Funds

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

#### Percentage to Increase or Improve Services

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

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

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

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

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

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

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

## State Priorities

**Priority 1: Basic Services** addresses the degree to which:

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

**Priority 2: Implementation of State Standards** addresses:

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

**Priority 3: Parental Involvement** addresses:

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

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

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

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

- A. School attendance rates;
- B. Chronic absenteeism rates;

- C. Middle school dropout rates;
- D. High school dropout rates; and
- E. High school graduation rates;

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

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

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

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

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

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

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

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

**Local Priorities** address:

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

## APPENDIX A: PRIORITIES 5 AND 6 RATE CALCULATION INSTRUCTIONS

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

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

- (1) The number of pupils with a primary, secondary, or short-term enrollment during the academic year (July 1 – June 30) who are chronically absent where “chronic absentee” means a pupil who is absent 10 percent or more of the schooldays in the school year when the total number of days a pupil is absent is divided by the total number of days the pupil is enrolled and school was actually taught in the total number of days the pupil is enrolled and school was actually taught in the regular day schools of the district, exclusive of Saturdays and Sundays.
- (2) The unduplicated count of pupils with a primary, secondary, or short-term enrollment during the academic year (July 1 – June 30).
- (3) Divide (1) by (2).

(b) “Middle School dropout rate” shall be calculated as set forth in *California Code of Regulations*, title 5, Section 1039.1.

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

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

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

- (1) The number of cohort members who earned a regular high school diploma [or earned an adult education high school diploma or passed the California High School Proficiency Exam] by the end of year 4 in the cohort where “cohort” is defined as the number of first-time grade 9 pupils in year 1 (starting cohort) plus pupils who transfer in, minus pupils who transfer out, emigrate, or die during school years 1, 2, 3, and 4.
- (2) The total number of cohort members.
- (3) Divide (1) by (2).

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

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

(f) "Expulsion rate" shall be calculated as follows:

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

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

## **APPENDIX B: GUIDING QUESTIONS**

### **Guiding Questions: Annual Review and Analysis**

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

### **Guiding Questions: Stakeholder Engagement**

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

## Guiding Questions: Goals, Actions, and Services

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

*Prepared by the California Department of Education, October 2016*



### LCAP Expenditure Summary

Total Expenditures by Funding Source						
Funding Source	2016-17 Annual Update Budgeted	2016-17 Annual Update Actual	2017-18	2018-19	2019-20	2017-18 through 2019-20 Total
All Funding Sources	422,629.00	644,969.00	560,903.00	728,934.00	913,274.00	2,203,111.00
	422,629.00	644,969.00	560,903.00	728,934.00	913,274.00	2,203,111.00

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

<b>Total Expenditures by Object Type</b>						
<b>Object Type</b>	<b>2016-17 Annual Update Budgeted</b>	<b>2016-17 Annual Update Actual</b>	<b>2017-18</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2017-18 through 2019-20 Total</b>
All Expenditure Types	422,629.00	644,969.00	560,903.00	728,934.00	913,274.00	2,203,111.00
	422,629.00	644,969.00	560,903.00	728,934.00	913,274.00	2,203,111.00

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

<b>Total Expenditures by Object Type and Funding Source</b>							
<b>Object Type</b>	<b>Funding Source</b>	<b>2016-17 Annual Update Budgeted</b>	<b>2016-17 Annual Update Actual</b>	<b>2017-18</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2017-18 through 2019-20 Total</b>
All Expenditure Types	All Funding Sources	422,629.00	644,969.00	560,903.00	728,934.00	913,274.00	2,203,111.00
		422,629.00	644,969.00	560,903.00	728,934.00	913,274.00	2,203,111.00

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

<b>Total Expenditures by Goal</b>				
<b>Goal</b>	<b>2017-18</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2017-18 through 2019-20 Total</b>
<b>Goal 1</b>	92,113.00	113,108.00	128,652.00	333,873.00
<b>Goal 2</b>	79,697.00	143,929.00	175,307.00	398,933.00
<b>Goal 3</b>	299,093.00	380,097.00	515,679.00	1,194,869.00
<b>Goal 4</b>	90,000.00	91,800.00	93,636.00	275,436.00

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

# LCAP Expenditures By Funding Source

## East Bay Innovation Academy

Proposed Expenditure	Object Code	Amount	Action
train DESEL who in turn established curriculum and support and facilitates ongoing development and sustainability of school culture and discipline plan. The Director of Innovative Instruction performs this function at the High School.		\$6,097.00	
staff salary and benefits.		\$2,050,000.00	Provide professional development and support to ensure teaching staff delivers creative personalized and innovative learning experiences to all teachers.
student Chromebooks-100 total.		\$46,200.00	Ensure proper technology is in place so that all students can access curriculum and demonstrate mastery of material digitally.
summer PD		\$1,500.00	Implement daily Morning Meeting and Advisory times to create a sense of community and to honor students embracing the Innovator Norms.
		\$3,000.00	Train and support all staff on positive school culture and discipline plan.
instructional materials.		\$63,600.00	Teach social-emotional curriculum and embed it throughout all curricula.
		\$12,000.00	Train all staff and students on design thinking principles and incorporate those principles in all phases of work.
		\$33,000.00	Students will be offered blended learning opportunities to access the curriculum in a personalized, differentiated approach.
		\$15,000.00	Students will demonstrate mastery of content materials through project-based learning.
		\$13,500.00	Implement system for positive and/or perfect attendance.

## East Bay Innovation Academy

Professional Development	\$24,405.00	We have planned several structures to ensure that we have a professional development setting that delivers creative, personalized, and innovative learning experiences. As such we planned the following sub goals. •Improve upon the practice of PBL •Integrate the design thinking process into the curriculum •Decrease the gap that exist in academic achievement in sub groups
Student Chromebooks	\$92,100.00	Ensure proper technology, is in place so that all students can access curriculum and demonstrate mastery of material digitally. Provide equal course access to all students on a college preparatory track.
students plus 50% of 1st year computers replaced.	\$400.00	Ensure proper technology, is in place so that all students can access curriculum and demonstrate mastery of material digitally. Provide equal course access to all students on a college preparatory track.
staff tech needs.	\$4,900.00	Provide equal course access to all students on a college preparatory track.
Staff and DESEL and Director of Innovative Instruction establish curriculum for lesson planning and work collaboratively with staff to educate to the Innovator Norms and facilitate during Morning Meeting and Advisory. Teaching staff are trained during Professional Development days and DESEL attends conferences/workshops and trains teachers.	\$5,600.00	Implement daily Morning Meeting and Advisory times to create a sense of community and to honor students embracing the Innovator Norms.
train DESEL who in turn established curriculum and support and facilitates ongoing development and sustainability of school culture and discipline plan. The Director of Innovative Instruction performs this function at the High School.	\$3,000.00	Train and support all staff on positive school culture and discipline plan.
instructional materials previously accounted for in Section 3a, Goals 3 and 4	\$92,908.00	Teach social-emotional curriculum and embed it throughout all curricula.
	\$92,908.00	Train all staff and students on design thinking principles and incorporate those principles in all phases of work.
Included above.	\$92,908.00	Students will be offered blended learning opportunities to access the curriculum in a personalized, differentiated approach.
Illuminate	\$13,500.00	Implement system for positive and/or perfect attendance.

## East Bay Innovation Academy

Professional Development	\$25,613.00	Provide professional development and support to ensure teaching staff delivers creative, personalized and innovative learning experiences to all students.
student Chromebooks-100 machines for new students and 50% of 1st year computers replaced	\$58,000.00	Ensure proper technology is in place so that all students can access curriculum and demonstrate mastery of material digitally.
staff tech needs	\$8,500.00	Provide equal course access to all students on a college preparatory track.
Staff and DESEL and Director of Innovative Instruction establish curriculum for lesson planning and work collaboratively with staff to educate to the Innovator Norms and facilitate during Morning Meeting and Advisory. Teaching staff are trained during Professional Development days and DESEL attends conferences/workshops and trains teachers.	\$7,097.00	Implement daily Morning Meeting and Advisory times to create a sense of community and to honor students embracing the Innovator norms.
train DESEL who in turn established curriculum and support and facilitates ongoing development and sustainability of school culture and discipline plan. The Director of Innovative Instruction performs this function at the High School.	\$3,821.00	Train and support all staff on positive school culture and discipline plan.
instructional materials previously accounted for in Section 3a, Goals 3 and 4	\$68,779.00	Teach social-emotional curriculum and embed it throughout curricula.
	\$113,277.00	Train all staff and students on design thinking principles and incorporate those principles in all phases of work.
Included above.	\$92,908.00	Students will be offered blended learning opportunities to access the curriculum in a personalized, differentiated approach
Included above.	\$92,908.00	Students will collaborate, manage change and take ownership of their learning experiences.
Illuminate	\$30,000.00	Implement system for positive and/or perfect attendance.
Included above.	\$30,000.00	Communicate daily with families about student absences.

## East Bay Innovation Academy

Included above.	\$30,000.00	Develop a strategic intervention system for students falling below 90% attendance rate.
Professional Development	\$26,431.00	Provide professional development and support to ensure teaching staff delivers creative, personalized and innovative learning experiences to all students.
student Chromebooks-100 total and 50% 2nd year computers replaced.	\$71,677.00	Ensure proper technology is in place so that all students can access curriculum and demonstrate mastery of material digitally.
staff tech needs	\$15,000.00	Provide equal course access to all students on a college preparatory track.
Staff and DESEL and Director of Innovative Instruction establish curriculum for lesson planning and work collaboratively with staff to educate to the Innovator Norms and facilitate during Morning Meeting and Advisory. Teaching staff are trained during Professional Development days and DESEL attends conferences/workshops and trains teachers.	\$8,965.00	Implement daily Morning Meeting and Advisory times to create a sense of community and to honor students embracing the Innovator norms.
train DESEL who in turn established curriculum and support and facilitates ongoing development and sustainability of school culture and discipline plan. The Director of Innovative Instruction performs this function at the High School.	\$4,827.00	Train and support all staff on positive school culture and discipline plan.
instructional materials previously accounted for in Section 3a, Goals 3 and 4	\$130,137.00	Teach social-emotional curriculum and embed it throughout curricula.
	\$153,643.00	Train all staff and students on design thinking principles and incorporate those principles in all phases of work.
Included above.	\$113,227.00	Students will be offered blended learning opportunities to access the curriculum in a personalized, differentiated approach
Included above.	\$113,227.00	Students will collaborate, manage change and take ownership of their learning experiences.
Illuminate	\$30,600.00	Implement system for positive and/or perfect attendance.



## East Bay Innovation Academy

Included above.	\$30,600.00	Communicate daily with families about student absences.
Included above.	\$30,600.00	Develop a strategic intervention system for students falling below 90% attendance rate.
Professional Development	\$26,690.00	Provide professional development and support to ensure teaching staff delivers creative, personalized and innovative learning experiences to all students.
	\$86,962.00	Ensure proper technology is in place so that all students can access curriculum and demonstrate mastery of material digitally.
staff tech needs	\$15,000.00	Provide equal course access to all students on a college preparatory track.
Staff and DESEL and Director of Innovative Instruction establish curriculum for lesson planning and work collaboratively with staff to educate to the Innovator Norms and facilitate during Morning Meeting and Advisory. Teaching staff are trained during Professional Development days and DESEL attends conferences/workshops and trains teachers.	\$11,324.00	Implement daily Morning Meeting and Advisory times to create a sense of community and to honor students embracing the Innovator norms.
instructional materials previously accounted for in Section 3a, Goals 3 and 4	\$157,886.00	Teach social-emotional curriculum and embed it throughout curricula.
	\$208,393.00	Train all staff and students on design thinking principles and incorporate those principles in all phases of work.
Included above.	\$153,643.00	Students will be offered blended learning opportunities to access the curriculum in a personalized, differentiated approach
Included above.	\$153,643.00	Students will collaborate, manage change and take ownership of their learning experiences.
Illuminate	\$31,212.00	Implement system for positive and/or perfect attendance.
(included above)	\$31,212.00	Communicate daily with families about student absences.

## East Bay Innovation Academy

(included above)

\$31,212.00 Develop a strategic intervention system for students falling below 90% attendance rate.

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\$4,863,540.00

East Bay Innovation Academy Total Expenditures: \$4,863,540.00

# Cover Sheet

## May YTD Financial Update

**Section:** VI. Finance/Business Operations  
**Item:** A. May YTD Financial Update  
**Purpose:** Discuss  
**Submitted by:**  
**Related Material:** EBIA-Jun Financial Presentation-2017.06.12-mc.pdf  
EBIA-May-16-17 Financials-2017.06.12-mc CF.pdf  
EBIA-May-16-17 Financials-2017.06.12-mc YTD.pdf

# East Bay Innovation Academy

May Financials and 17-18 Budget



June 12, 2017

Michelle Cho

# Financial Presentation Agenda



- May Financials
- 16-17 Current Forecast
- 17-18 Budget Update

# 1. May Financials

# May: big revenue month

## YTD 88% of expense forecast spent



- Revenues
  - \$300K Silicon Valley Schools grant received; fundraising target expected to be met
- Expenses: uptick in services
  - OUSD facility costs: janitorial, utilities

	Mar	Apr	May	Actual YTD	Budget YTD	Variance (YTD less Budget)
<b>SUMMARY</b>						
<b>Revenue</b>						
LCFF Entitlement	377,214	273,232	270,792	2,547,893	2,566,183	(18,290)
Federal Revenue	63,392	2,814	-	88,483	188,340	(99,857)
Other State Revenues	81,268	32,445	38,446	332,364	274,545	57,819
Local Revenues	7,608	4,100	300,993	395,255	16,332	378,923
Fundraising and Grants	53,564	2,943	19,199	490,419	683,366	(192,947)
<b>Total Revenue</b>	<b>583,045</b>	<b>315,534</b>	<b>629,430</b>	<b>3,854,413</b>	<b>3,728,766</b>	<b>125,648</b>
<b>Expenses</b>						
Compensation and Benefits	276,658	253,109	272,112	2,700,097	2,704,742	4,644
Books and Supplies	18,638	15,455	12,576	229,937	276,797	46,860
Services and Other Operating Expenditures	173,296	86,748	189,964	1,193,124	1,112,726	(80,398)
Depreciation	-	-	-	-	-	-
<b>Total Expenses</b>	<b>468,592</b>	<b>355,312</b>	<b>474,653</b>	<b>4,123,158</b>	<b>4,094,265</b>	<b>(28,894)</b>
<b>Operating Income</b>	<b>114,453</b>	<b>(39,778)</b>	<b>154,777</b>	<b>(268,745)</b>	<b>(365,499)</b>	<b>96,754</b>

# Balance Sheet as of May 31

## 16-17 revenues catching up with expenses



		5/31/2017	6/30/2016	YTD Change
<b>Assets</b>				
	Cash Balances	\$ 443,062	\$ 391,575	\$ 51,486
	Accounts Receivable	\$ 6,022	\$ 550,975	(544,953)
	Prepays and Other Assets	\$ -	\$ 27,880	(27,880)
	Fixed Assets, Net	\$ -	\$ -	-
	Investments	\$ -	\$ -	-
	Due to/from other	\$ -	\$ -	-
	<b>Total Assets</b>	<b>449,084</b>	<b>970,430</b>	<b>(521,346)</b>
<b>Liabilities &amp; Equity</b>				
	Accrued Expenses	\$ 127,188	\$ 129,792	\$ (2,603)
	Due to Grantor Governments/Others	\$ -	\$ -	-
	OPEB Liability	\$ -	\$ -	-
	Deferred Revenue	\$ -	\$ 200,000	(200,000)
	Loans and other payables	\$ 150,004	\$ 200,002	(49,998)
	Beginning Net Assets - Audited	\$ 440,636	\$ 34,377	406,259
	Other Restatements	\$ -	\$ -	-
	Net Income (Loss) to Date	\$ (268,745)	\$ 406,259	(675,004)
	<b>Total Liabilities &amp; Equity</b>	<b>449,084</b>	<b>970,430</b>	<b>(521,346)</b>

- Cash position will hold through 17-18



## 2. 16-17 Current Forecast

# 16-17 Outlook improved through additional revenue

## Expected operating income \$19K

- Rogers Family Foundation **+\$50K**
- **\$37K** of education software reduced, uncategorized expenses categorized (**-\$14K**)
- Actuals exceeding budget: student food services (**+\$5K**), materials and supplies (**+\$1K**), utilities (**+\$22K**), legal fees (**+\$10K**), professional development (**+\$2K**), substitutes (**+\$5K**), technology services (**+\$6K**), Other (**+\$3K**)

	Approved Budget	Previous Month's Forecast	Current Forecast	(Previous vs. Current Forecast)	Forecast Remaining
<b>SUMMARY</b>					
<b>Revenue</b>					
LCFF Entitlement	3,329,153	3,155,733	3,155,733	-	607,840
Federal Revenue	304,213	229,923	231,667	1,744	143,184
Other State Revenues	385,027	435,598	435,653	56	103,289
Local Revenues	38,318	39,229	37,986	(1,243)	(357,269)
Fundraising and Grants	503,500	788,133	838,133	50,000	347,714
<b>Total Revenue</b>	<b>4,560,212</b>	<b>4,648,615</b>	<b>4,699,172</b>	<b>50,556</b>	<b>844,758</b>
<b>Expenses</b>					
Compensation and Benefits	2,952,284	2,974,251	2,974,251	-	274,154
Books and Supplies	288,783	322,456	294,009	28,448	64,071
Services and Other Operating Expenditures	1,312,232	1,379,769	1,411,728	(31,960)	218,605
Depreciation	-	-	-	-	-
<b>Total Expenses</b>	<b>4,553,299</b>	<b>4,676,476</b>	<b>4,679,988</b>	<b>(3,512)</b>	<b>556,830</b>
<b>Operating Income</b>	<b>6,913</b>	<b>(27,861)</b>	<b>19,184</b>	<b>47,044</b>	<b>287,928</b>

## 3. 17-18 Budget Update

# EBIA 3-Year Outlook

## Gaining scale, monitoring growth



		2016/17	2017/18	2018/19	2019/20
		Current Forecast	Preliminary Budget	Preliminary Budget	Preliminary Budget
<b>SUMMARY</b>					
<b>Revenue</b>					
	LCFF Entitlement	3,155,733	3,876,091	4,892,306	6,038,735
	Federal Revenue	231,667	356,007	378,806	406,468
	Other State Revenues	435,653	409,285	481,356	560,144
	Local Revenues	37,986	179,434	271,168	375,674
	Fundraising and Grants	838,133	465,350	212,450	72,200
	<b>Total Revenue</b>	<b>4,699,172</b>	<b>5,286,167</b>	<b>6,236,086</b>	<b>7,453,220</b>
<b>Expenses</b>					
	Compensation and Benefits	2,974,251	3,477,931	4,076,586	4,801,938
	Books and Supplies	294,009	219,533	316,872	463,297
	Services and Other Operating Expenditures	1,411,728	1,554,613	1,783,191	1,898,991
	Depreciation	-	-	-	-
	<b>Total Expenses</b>	<b>4,679,988</b>	<b>5,252,077</b>	<b>6,176,649</b>	<b>7,164,226</b>
<b>Operating Income</b>		<b>19,184</b>	<b>34,091</b>	<b>59,437</b>	<b>288,994</b>
<b>Fund Balance</b>					
	Beginning Balance (Unaudited)	477,576	459,820	493,911	553,348
	Audit Adjustment	(36,940)	-	-	-
	Beginning Balance (Audited)	440,636	459,820	493,911	553,348
	Operating Income	19,184	34,091	59,437	288,994
<b>Ending Fund Balance (including Depreciation)</b>		<b>459,820</b>	<b>493,911</b>	<b>553,348</b>	<b>842,342</b>
<b>Ending Fund Balance as a % of Expenses</b>		<b>10%</b>	<b>9%</b>	<b>9%</b>	<b>12%</b>

# Revenue: Enrollment & LCFF

Enrollment and attendance critical to meeting revenue forecasts



Variable	2016-17	2017-18	2018-19	2019-20
LCFF per ADA	<b>\$7,809</b>	<b>\$8,151</b>	<b>\$8,533</b>	<b>\$8,892</b>
Enrollment	<b><u>419</u></b> 6 <sup>th</sup> : 116 7 <sup>th</sup> : 118 8 <sup>th</sup> : 125 9 <sup>th</sup> : 60	<b><u>501</u></b> 6 <sup>th</sup> : 124 7 <sup>th</sup> : 124 8 <sup>th</sup> : 118 9 <sup>th</sup> : 70 10 <sup>th</sup> : 65	<b><u>607</u></b> 6 <sup>th</sup> : 124 7 <sup>th</sup> : 124 8 <sup>th</sup> : 124 9 <sup>th</sup> : 110 10 <sup>th</sup> : 65 11 <sup>th</sup> : 60	<b><u>722</u></b> 6 <sup>th</sup> : 124 7 <sup>th</sup> : 124 8 <sup>th</sup> : 124 9 <sup>th</sup> : 110 10 <sup>th</sup> : 105 11 <sup>th</sup> : 75 12 <sup>th</sup> : 60
ADA (attendance)	<b>403.9</b> <b>(96%)</b>	<b>475.6</b> <b>(95%)</b>	<b>573.3</b> <b>(94%)</b>	<b>679.1</b> <b>(94%)</b>
Unduplicated Count	<b>90 (21%)</b>	<b>108 (21%)</b>	<b>131 (21%)</b>	<b>156 (21%)</b>

# Revenue: Other

Local funds and fundraising are key to covering expenses



Variable	2016-17	2017-18	2018-19	2019-20
Special Ed per ADA	\$127 Federal \$507 State	\$125 Federal \$514 State	\$125 Federal \$514 State	\$125 Federal \$514 State
Special Ed Mental Health	\$66K	\$66K	\$66K	\$66K
Special Ed NPS Reimbursement	\$155K	\$270K	\$275K	\$281K
Title (NCLB)	\$18K	\$17K	\$21K	\$26K
Lottery per ADA	\$189	\$189	\$189	\$189
Oakland Measures	\$12K	\$152K	\$238K	\$336K
Philanthropy	\$658K	\$290K		
Donations per Student	\$330	\$350	\$350	\$100

# Expenses: Academic Staff

## Upper Level DESEL added



Staff	2016-17	2017-18	2018-19	2019-20
Core Teachers	16	16	20	24
Specialty Teacher	5.5	6.5 (Art, Coding, Spanish, PE)	6.5	7.5
Special Education	3 RSP 4.4 Aides	3.5 RSP 4.4 Aides	4 RSP 5.1 Aides	4.5 RSP 5.1 Aides
Certificated Administrators	3	4 (Upper DESEL)	4	4

# Expenses: Support Staff

## Operational leadership consideration



Staff	2016-17	2017-18	2018-19	2019-20
Intersession	1	1	1	1
Front Office	1 Office Lead 2 Office Asst	1 COO/CFO 2.5 Office Asst	1 COO/CFO 2.5 Office Asst	1 COO/CFO 2.5 Office Asst
Other Supports	Lunch After School	Lunch After School 0.5 Tech	Lunch After School 0.5 Tech	Lunch After School 0.5 Tech
Contractors	Janitorial Back office Special ed	Janitorial Back office Special ed	Janitorial Back office Special ed	Janitorial Back office Special ed



# Highlights of 17-18 books and supplies, services

(See MYP DRAFT for line-item budgets)



- Facilities
  - 17-18 prop 39 offer (\$195K for both sites)
  - Janitorial: \$150K (including Roosevelt)
  - Utilities \$104K (including Roosevelt)
- Books & Supplies
  - Curriculum and materials
    - Education software purchase in 16-17 (\$37K)
  - Computers
    - Students: \$58K – chromebooks for new students plus replacements
    - Staff: \$9K
- Services
  - Intersession: \$275/student
  - SPED NPS (3 placements): \$380K
  - SPED contractors: \$122K
  - Back office: \$84K

**East Bay Innovation Academy**  
 Monthly Cash Forecast  
 As of May close

	2016/17												Forecast	AP/AR
	Actual & Projected													
	Jul Actual	Aug Actual	Sep Actual	Oct Actual	Nov Actual	Dec Actual	Jan Actual	Feb Actual	Mar Actual	Apr Actual	May Actual	Jun Projected		
<b>Beginning Cash</b>	<b>391,575</b>	<b>673,184</b>	<b>454,893</b>	<b>556,763</b>	<b>519,983</b>	<b>406,348</b>	<b>288,331</b>	<b>272,743</b>	<b>218,641</b>	<b>329,564</b>	<b>296,935</b>	<b>443,062</b>		
<b>Revenue</b>														
LCFF Entitlement	-	-	532,265	281,308	158,118	267,470	229,376	158,118	377,214	273,232	270,792	269,921	3,155,733	337,919
Federal Income	-	-	1,989	4,648	-	0	15,640	-	63,392	2,814	-	20,293	231,667	122,891
Other State Income	7,953	-	22,409	21,110	14,316	19,163	71,107	24,147	81,268	32,445	38,446	6,856	435,653	96,433
Local Revenues	108,994	143,594	(107,630)	(130,582)	131,611	(128,848)	3,774	61,641	7,608	4,100	300,993	(357,269)	37,986	-
Fundraising and Grants	200,000	-	2,778	78,428	43,044	82,744	6,309	1,411	53,564	2,943	19,199	342,076	838,133	5,638
<b>Total Revenue</b>	<b>316,947</b>	<b>143,594</b>	<b>451,811</b>	<b>254,911</b>	<b>347,089</b>	<b>240,529</b>	<b>326,207</b>	<b>245,317</b>	<b>583,045</b>	<b>315,534</b>	<b>629,430</b>	<b>281,878</b>	<b>4,699,172</b>	<b>562,881</b>
<b>Expenses</b>														
Compensation & Benefits	83,969	233,317	258,279	281,435	267,860	250,911	261,987	260,459	276,658	253,109	272,112	274,154	2,974,251	-
Books & Supplies	56,771	18,704	38,248	(514)	22,715	11,803	26,817	8,725	18,638	15,455	12,576	64,071	294,009	-
Services & Other Operating Expenses	42,738	102,635	65,445	110,278	162,615	78,927	89,149	91,328	173,296	86,748	189,964	123,824	1,411,728	94,781
Capital Outlay	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Expenses</b>	<b>183,478</b>	<b>354,657</b>	<b>361,972</b>	<b>391,199</b>	<b>453,190</b>	<b>341,641</b>	<b>377,953</b>	<b>360,512</b>	<b>468,592</b>	<b>355,312</b>	<b>474,653</b>	<b>462,049</b>	<b>4,679,988</b>	<b>94,781</b>
<b>Operating Cash Inflow (Outflow)</b>	<b>133,469</b>	<b>(211,063)</b>	<b>89,839</b>	<b>(136,288)</b>	<b>(106,101)</b>	<b>(101,112)</b>	<b>(51,746)</b>	<b>(115,196)</b>	<b>114,453</b>	<b>(39,778)</b>	<b>154,777</b>	<b>(180,172)</b>	<b>19,184</b>	<b>468,100</b>
Revenues - Prior Year Accruals	351,390	-	5,866	111,938	-	2,629	21,385	57,500	-	(5,755)	-	6,022		
Expenses - Prior Year Accruals	-	(1,875)	(2,423)	(18,474)	-	-	-	-	-	2,514	(838)	-		
Accounts Receivable - Current Year	-	-	-	-	-	-	-	-	-	-	-	-		
Accounts Payable - Current Year	(30,497)	(4,623)	(2,829)	20,964	(11,079)	(23,201)	11,128	(18)	(15,472)	6,757	(19,865)	-		
Summerholdback for Teachers	(19,114)	(730)	11,417	11,895	11,878	12,000	11,978	11,944	11,941	11,966	12,052	13,726		
Loans Payable (Current)	-	-	-	-	-	-	-	-	-	-	-	-		
Loans Payable (Long Term)	-	-	-	(8,333)	(8,333)	(8,333)	(8,333)	(8,333)	-	(8,333)	-	-		
Capital Leases Payable	-	-	-	-	-	-	-	-	-	-	-	-		
Other Long Term Debt	-	-	-	-	-	-	-	-	-	-	-	-		
Capital Expenditure & Depreciation	-	-	-	-	-	-	-	-	-	-	-	-		
Other Balance Sheet Changes	(153,639)	-	-	(18,481)	-	-	-	-	-	-	-	-		
<b>Ending Cash</b>	<b>673,184</b>	<b>454,893</b>	<b>556,763</b>	<b>519,983</b>	<b>406,348</b>	<b>288,331</b>	<b>272,743</b>	<b>218,641</b>	<b>329,564</b>	<b>296,935</b>	<b>443,062</b>	<b>282,638</b>		

**East Bay Innovation Academy**  
 Monthly Cash Forecast  
 As of May close

	2017/18												Forecast	AP/AR
	Projected													
	Jul Projected	Aug Projected	Sep Projected	Oct Projected	Nov Projected	Dec Projected	Jan Projected	Feb Projected	Mar Projected	Apr Projected	May Projected	Jun Projected		
<b>Beginning Cash</b>	<b>282,638</b>	<b>391,757</b>	<b>315,992</b>	<b>36,902</b>	<b>238,814</b>	<b>314,561</b>	<b>169,521</b>	<b>178,644</b>	<b>195,053</b>	<b>197,075</b>	<b>426,562</b>	<b>442,582</b>		
<b>Revenue</b>														
LCFF Entitlement	-	169,811	225,280	463,566	279,774	279,774	385,550	279,774	412,811	362,201	331,258	331,258	3,876,091	355,036
Federal Income	-	-	-	5,973	69,123	1,623	5,973	69,123	1,623	5,973	32,524	1,623	356,007	162,447
Other State Income	-	10,573	10,573	19,235	26,454	19,235	19,235	71,179	25,829	25,829	44,914	25,829	409,285	110,399
Local Revenues	0	0	1,218	93,018	38,696	1,218	26,673	3,723	3,723	3,723	3,723	3,723	179,434	-
Fundraising and Grants	-	-	3,507	31,563	52,605	57,014	1,754	1,754	64,880	241,754	5,261	5,261	465,350	-
<b>Total Revenue</b>	<b>0</b>	<b>180,384</b>	<b>240,578</b>	<b>613,355</b>	<b>466,652</b>	<b>358,864</b>	<b>439,184</b>	<b>425,552</b>	<b>508,865</b>	<b>639,479</b>	<b>417,679</b>	<b>367,693</b>	<b>5,286,167</b>	<b>627,882</b>
<b>Expenses</b>														
Compensation & Benefits	87,910	174,778	320,763	313,577	312,380	312,380	321,960	313,577	313,577	309,196	309,196	388,638	3,477,931	-
Books & Supplies	40,168	45,153	29,211	13,665	13,665	13,665	10,668	10,668	10,668	10,668	10,668	10,668	219,533	-
Services & Other Operating Expenses	43,803	70,299	177,967	92,695	92,695	190,396	104,144	99,941	197,642	96,839	96,839	177,318	1,554,613	114,035
Capital Outlay	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Expenses</b>	<b>171,881</b>	<b>290,230</b>	<b>527,941</b>	<b>419,937</b>	<b>418,739</b>	<b>516,440</b>	<b>436,772</b>	<b>424,186</b>	<b>521,887</b>	<b>416,703</b>	<b>416,703</b>	<b>576,623</b>	<b>5,252,077</b>	<b>114,035</b>
<b>Operating Cash Inflow (Outflow)</b>	<b>(171,881)</b>	<b>(109,845)</b>	<b>(287,363)</b>	<b>193,418</b>	<b>47,913</b>	<b>(157,576)</b>	<b>2,412</b>	<b>1,366</b>	<b>(13,022)</b>	<b>222,777</b>	<b>977</b>	<b>(208,930)</b>	<b>34,091</b>	<b>513,847</b>
Revenues - Prior Year Accruals	415,506	117,640	1,564	1,784	21,124	5,825	-	-	-	-	-	(561)		
Expenses - Prior Year Accruals	(50,315)	(31,557)	-	-	-	-	-	-	-	-	-	-		
Accounts Receivable - Current Year	-	-	-	-	-	-	-	-	-	-	-	-		
Accounts Payable - Current Year	-	-	-	-	-	-	-	-	-	-	-	-		
Summerholdback for Teachers	(84,191)	(52,002)	15,044	15,044	15,044	15,044	15,044	15,044	15,044	15,044	15,044	15,044		
Loans Payable (Current)	-	-	-	-	-	-	-	-	-	-	-	-		
Loans Payable (Long Term)	-	-	(8,333)	(8,333)	(8,333)	(8,333)	(8,333)	-	-	(8,333)	-	-		
Capital Leases Payable	-	-	-	-	-	-	-	-	-	-	-	-		
Other Long Term Debt	-	-	-	-	-	-	-	-	-	-	-	-		
Capital Expenditure & Depreciation	-	-	-	-	-	-	-	-	-	-	-	-		
Other Balance Sheet Changes	-	-	-	-	-	-	-	-	-	-	-	-		
<b>Ending Cash</b>	<b>391,757</b>	<b>315,992</b>	<b>36,902</b>	<b>238,814</b>	<b>314,561</b>	<b>169,521</b>	<b>178,644</b>	<b>195,053</b>	<b>197,075</b>	<b>426,562</b>	<b>442,582</b>	<b>248,135</b>		

**East Bay Innovation Academy**

Budget vs. Actuals

As of May close

	Actual			Budget vs. Actual			Budget					
	Mar	Apr	May	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Previous Month's Forecast	Current Forecast	Variance (Previous vs. Current Forecast)	Forecast Remaining	% of Forecast Spent
<b>SUMMARY</b>												
<b>Revenue</b>												
LCFF Entitlement	377,214	273,232	270,792	2,547,893	2,566,183	(18,290)	3,329,153	3,155,733	3,155,733	-	607,840	81%
Federal Revenue	63,392	2,814	-	88,483	188,340	(99,857)	304,213	229,923	231,667	1,744	143,184	38%
Other State Revenues	81,268	32,445	38,446	332,364	274,545	57,819	385,027	435,598	435,653	56	103,289	76%
Local Revenues	7,608	4,100	300,993	395,255	16,332	378,923	38,318	39,229	37,986	(1,243)	(357,269)	1041%
Fundraising and Grants	53,564	2,943	19,199	490,419	683,366	(192,947)	503,500	788,133	838,133	50,000	347,714	59%
<b>Total Revenue</b>	<b>583,045</b>	<b>315,534</b>	<b>629,430</b>	<b>3,854,413</b>	<b>3,728,766</b>	<b>125,648</b>	<b>4,560,212</b>	<b>4,648,615</b>	<b>4,699,172</b>	<b>50,556</b>	<b>844,758</b>	<b>82%</b>
<b>Expenses</b>												
Compensation and Benefits	276,658	253,109	272,112	2,700,097	2,704,742	4,644	2,952,284	2,974,251	2,974,251	-	274,154	91%
Books and Supplies	18,638	15,455	12,576	229,937	276,797	46,860	288,783	322,456	294,009	28,448	64,071	78%
Services and Other Operating Expenditures	173,296	86,748	189,964	1,193,124	1,112,726	(80,398)	1,312,232	1,379,769	1,411,728	(31,960)	218,605	85%
Depreciation	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Expenses</b>	<b>468,592</b>	<b>355,312</b>	<b>474,653</b>	<b>4,123,158</b>	<b>4,094,265</b>	<b>(28,894)</b>	<b>4,553,299</b>	<b>4,676,476</b>	<b>4,679,988</b>	<b>(3,512)</b>	<b>556,830</b>	<b>88%</b>
<b>Operating Income</b>	<b>114,453</b>	<b>(39,778)</b>	<b>154,777</b>	<b>(268,745)</b>	<b>(365,499)</b>	<b>96,754</b>	<b>6,913</b>	<b>(27,861)</b>	<b>19,184</b>	<b>47,044</b>	<b>287,928</b>	
<b>Fund Balance</b>												
Beginning Balance (Unaudited)	(20,622)	93,832	54,054	477,576	477,576		417,368	477,576	477,576			
Audit Adjustment				(36,940)	(36,940)		-	(36,940)	(36,940)			
Beginning Balance (Audited)				440,636	440,636		417,368	440,636	440,636			
Operating Income	114,453	(39,778)	154,777	(268,745)	(365,499)		6,913	(27,861)	19,184			
<b>Ending Fund Balance</b>	<b>93,832</b>	<b>54,054</b>	<b>208,831</b>	<b>171,891</b>	<b>75,137</b>		<b>424,281</b>	<b>412,775</b>	<b>459,820</b>			
<b>Capital Outlay</b>	-	-	-	-	-		-	-	-			

**East Bay Innovation Academy**

Budget vs. Actuals

As of May close

Detail	Actual			Budget vs. Actual			Budget					
	Mar	Apr	May	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Previous Month's Forecast	Current Forecast	Variance (Previous vs. Current Forecast)	Forecast Remaining	% of Forecast Spent
<b>Enrollment Breakdown</b>		M9										
6		114					115	116	116	-		
7		116					115	118	118	-		
8		123					120	125	125	-		
9		60					100	60	60	-		
<b>Enrollment Summary</b>												
4-6		114					115	116	116	-		
7-8		239					235	243	243	-		
9-12		60					100	60	60	-		
<b>Total Enrolled</b>		413					<b>450</b>	<b>419</b>	<b>419</b>	-		
<b>ADA %</b>												
4-6		96.7%					95%	97%	97%			
7-8		97.7%					95%	97%	97%			
9-12		94.3%					90%	95%	95%			
<b>Average</b>							<b>94%</b>	<b>96%</b>	<b>96%</b>			
<b>ADA</b>												
4-6		110.2					109.3	112.7	112.7			
7-8		233.9					223.3	235.3	235.3			
9-12		56.6					90.0	55.9	55.9			
Total ADA		400.6					422.5	403.9	403.9			
<b>Demographic Information</b>		403.91										
<b>Prior Year</b>												
<b>ADA (P-2)</b>							332	332	332			
CALPADS Enrollment (for unduplicated % calc)							342	344	344			
# Unduplicated Count (CALPADS)							57	57	57			
# Free & Reduced Lunch (FRL) (CALPADS)							48	48	48			
# ELL (CALPADS)							17	17	17			
<b>Current Year</b>							-	-	-			
CALPADS Enrollment (for unduplicated % calc)							450	419	419			
# Unduplicated Count (CALPADS)							68	90	90			
# Free & Reduced Lunch (FRL) (CALPADS)							63	58	58			
# ELL (CALPADS)							22	21	21			
New Students							108	75	75			

**East Bay Innovation Academy**

Budget vs. Actuals  
As of May close

	Actual			Budget vs. Actual			Budget					
	Mar	Apr	May	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Previous Month's Forecast	Current Forecast	Variance (Previous vs. Current Forecast)	Forecast Remaining	% of Forecast Spent
<b>REVENUE</b>												
<b>LCFF Entitlement</b>												
8011 Charter Schools LCFF - State Aid	190,596	192,272	191,434	1,774,137	1,739,342	34,795	2,381,258	2,148,868	2,148,868	-	374,731	83%
8012 Education Protection Account Entitlement	27,902	-	-	61,067	61,079	(12)	84,500	80,782	80,782	-	19,715	76%
8019 State Aid - Prior Years	-	1,602	-	1,602	-	1,602	-	1,602	1,602	-	-	100%
8096 Charter Schools in Lieu of Property Taxes	158,716	79,358	79,358	711,087	765,763	(54,676)	863,396	924,481	924,481	-	213,394	77%
<b>SUBTOTAL - LCFF Entitlement</b>	<b>377,214</b>	<b>273,232</b>	<b>270,792</b>	<b>2,547,893</b>	<b>2,566,183</b>	<b>(18,290)</b>	<b>3,329,153</b>	<b>3,155,733</b>	<b>3,155,733</b>	<b>-</b>	<b>607,840</b>	<b>81%</b>
<b>8100 Federal Revenue</b>												
8181 Special Education - Entitlement	-	-	-	-	25,223	(25,223)	42,750	43,688	43,688	-	43,688	0%
8182 Special Education Reimbursement	63,392	-	-	63,392	134,208	(70,816)	227,471	155,253	155,253	-	91,861	41%
8220 Child Nutrition Programs	-	2,814	-	6,698	20,494	(13,796)	22,771	11,860	13,603	1,744	6,906	49%
8291 Title I	-	-	-	16,753	7,767	8,986	10,356	16,753	16,753	-	-	100%
8292 Title II	-	-	-	135	648	(513)	864	864	864	-	729	16%
8297 PY Federal - Not Accrued	-	-	-	1,505	-	1,505	-	1,505	1,505	-	-	100%
<b>SUBTOTAL - Federal Income</b>	<b>63,392</b>	<b>2,814</b>	<b>-</b>	<b>88,483</b>	<b>188,340</b>	<b>(99,857)</b>	<b>304,213</b>	<b>229,923</b>	<b>231,667</b>	<b>1,744</b>	<b>143,184</b>	<b>38%</b>
<b>8300 Other State Revenues</b>												
8319 Other State Apportionments - Prior Years	101	(37)	-	5,327	-	5,327	-	5,327	5,327	-	-	100%
8381 Special Education - Entitlement (State)	43,275	21,791	21,791	181,030	161,886	19,144	202,694	211,469	211,469	-	30,439	86%
8382 Special Education Reimbursement (State)	36,324	-	-	36,324	12,744	23,580	21,600	65,718	65,718	-	29,394	55%
8520 Child Nutrition - State	-	185	-	443.06	729	(286)	911	685	741	56	297	60%
8550 Mandated Cost Reimbursements	1,568	10,506	-	75,869	4,643	71,226	4,643	75,869	75,869	-	-	100%
8560 State Lottery Revenue	-	-	16,655	33,181	30,014	3,166	68,445	76,339	76,339	-	43,158	43%
8590 All Other State Revenue	-	-	-	190	55,717	(55,527)	76,943	190	190	-	-	100%
8599 Selpa Admin Offset	-	-	-	-	8,812	(8,812)	9,791	-	-	-	-	-
<b>SUBTOTAL - Other State Income</b>	<b>81,268</b>	<b>32,445</b>	<b>38,446</b>	<b>332,364</b>	<b>274,545</b>	<b>57,819</b>	<b>385,027</b>	<b>435,598</b>	<b>435,653</b>	<b>56</b>	<b>103,289</b>	<b>76%</b>
<b>8600 Other Local Revenue</b>												
8634 Food Service Sales	1,012	-	993	6,758	14,400	(7,642)	16,000	11,005	9,762	(1,243)	3,004	69%
8638 Merchandise Sales	-	-	-	342	-	342	-	342	342	-	-	100%
8660 Interest	0	0	0	1	1	1	1	1	1	0	0.12	91%
8690 Other Local Revenue	6,596	4,100	-	15,681	1,931	13,750	2,318	15,681	15,681	-	-	100%
8699 All Other Local Revenue	-	-	-	-	-	-	-	-	-	-	-	-
8701 Oakland Measure N	-	-	-	12,200	-	12,200	20,000	12,200	12,200	-	-	100%
8999 Uncategorized Revenue	-	-	300,000	360,273	-	360,273	-	-	-	-	(360,273)	-
<b>SUBTOTAL - Local Revenues</b>	<b>7,608</b>	<b>4,100</b>	<b>300,993</b>	<b>395,255</b>	<b>16,332</b>	<b>378,923</b>	<b>38,318</b>	<b>39,229</b>	<b>37,986</b>	<b>(1,243)</b>	<b>(357,269)</b>	<b>1041%</b>
<b>8800 Donations/Fundraising</b>												
8801 Donations - Parents	48,195	1,183	11,676	132,262	127,116	5,146	148,500	129,270	129,270	-	(2,992)	102%
8802 Donations - Private	3,591	1,760	2,236	295,858.75	500,000	(204,141)	280,000	591,863	591,863	-	296,004	50%
8803 Fundraising	1,777	-	5,286	62,298	56,250	6,048	75,000	67,000	117,000	50,000	54,702	53%
<b>SUBTOTAL - Fundraising and Grants</b>	<b>53,564</b>	<b>2,943</b>	<b>19,199</b>	<b>490,419</b>	<b>683,366</b>	<b>(192,947)</b>	<b>503,500</b>	<b>788,133</b>	<b>838,133</b>	<b>50,000</b>	<b>347,714</b>	<b>59%</b>
<b>TOTAL REVENUE</b>	<b>583,045</b>	<b>315,534</b>	<b>629,430</b>	<b>3,854,413</b>	<b>3,728,766</b>	<b>125,648</b>	<b>4,560,212</b>	<b>4,648,615</b>	<b>4,699,172</b>	<b>50,556</b>	<b>844,758</b>	<b>82%</b>

**East Bay Innovation Academy**

Budget vs. Actuals

As of May close

		Actual			Budget vs. Actual			Budget					
		Mar	Apr	May	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Previous Month's Forecast	Current Forecast	Variance (Previous vs. Current Forecast)	Forecast Remaining	% of Forecast Spent
<b>EXPENSES</b>													
<b>Compensation &amp; Benefits</b>													
1000	<b>Certificated Salaries</b>	-	-	-									
1100	Teachers Salaries	138,107	126,278	134,908	1,258,253	1,228,165	(30,088)	1,290,755	1,354,290	1,354,290	-	96,037	93%
1103	Teacher - Substitute Pay	1,022	1,369	1,302	22,856	21,315	(1,541)	21,315	28,420	28,420	-	5,564	80%
1111	Teacher - Bonus	-	-	-	-	-	-	41,854	31,854	31,854	-	31,854	0%
1148	Teacher - Special Ed	18,649	18,649	18,649	183,954	164,729	(19,225)	173,112	193,120	193,120	-	9,166	95%
1150	Teacher - Summer School	-	-	-	11,340	12,000	660	12,000	12,000	12,000	-	660	95%
1300	Certificated Supervisor & Administrator Salaries	11,158	11,749	17,214	129,389	120,954	(8,435)	131,950	133,900	133,900	-	4,511	97%
1311	Cert Admin - DESEL, Curr. Instr.	23,833	23,833	16,583	244,174	261,485	17,311	286,000	263,750	263,750	-	19,576	93%
1322	Cert Admin - Bonus	-	-	-	-	-	-	25,131	20,131	20,131	-	20,131	0%
<b>SUBTOTAL - Certificated Employees</b>		<b>192,771</b>	<b>181,879</b>	<b>188,657</b>	<b>1,849,965</b>	<b>1,808,647</b>	<b>(41,317)</b>	<b>1,982,117</b>	<b>2,037,465</b>	<b>2,037,465</b>	<b>-</b>	<b>187,500</b>	<b>91%</b>
2000	<b>Classified Salaries</b>												
2104	Classified - SPED	11,758	8,872	11,968	100,758	106,599	5,841	115,910	120,446	120,446	-	19,688	84%
2105	Classified - Enrichment	5,031	4,019	6,727	48,773	40,379	(8,395)	42,504	51,975	51,975	-	3,202	94%
2300	Classified Supervisor & Administrator Salaries	830	-	-	47,531	66,917	19,386	73,000	55,054	55,054	-	7,523	86%
2311	Classified Admin - Bonus	-	-	-	-	-	-	4,974	-	-	-	-	-
2400	Classified Clerical & Office Salaries	7,925	5,457	8,212	65,427	67,255	1,828	73,797	71,128	71,128	-	5,701	92%
2401	Classified Clerical & Office Salaries - Bonus	-	-	-	-	-	-	4,000	4,000	4,000	-	4,000	0%
2402	Classified Clerical & Office Salaries - Community Eng	5,667	5,667	5,667	63,443	59,583	(3,860)	65,000	69,000	69,000	-	5,557	92%
2905	Other Classified - After School	3,545	2,593	3,897	25,734	31,920	6,186	33,600	27,090	27,090	-	1,356	95%
2928	Other Classified - Food	1,480	1,200	1,840	13,860	27,037	13,177	28,460	14,858	14,858	-	998	93%
<b>SUBTOTAL - Classified Employees</b>		<b>36,235</b>	<b>27,807</b>	<b>38,309</b>	<b>365,526</b>	<b>399,690</b>	<b>34,164</b>	<b>441,244</b>	<b>413,551</b>	<b>413,551</b>	<b>-</b>	<b>48,025</b>	<b>88%</b>
3000	<b>Employee Benefits</b>												
3100	STRS	21,789	20,439	20,246	205,375	233,926	28,551	258,534	232,820	232,820	-	27,445	88%
3300	OASDI-Medicare-Alternative	6,516	5,692	7,252	66,555	50,306	(16,249)	58,334	73,101	73,101	-	6,547	91%
3400	Health & Welfare Benefits	15,860	17,014	15,297	169,842	161,437	(8,405)	161,437	171,242	171,242	-	1,400	99%
3500	Unemployment Insurance	872	279	(565)	18,993	24,768	5,775	24,652	21,345	21,345	-	2,352	89%
3600	Workers Comp Insurance	2,615	-	2,915	23,842	25,968	2,126	25,968	24,726	24,726	-	884	96%
<b>SUBTOTAL - Employee Benefits</b>		<b>47,652</b>	<b>43,423</b>	<b>45,145</b>	<b>484,606</b>	<b>496,404</b>	<b>11,798</b>	<b>528,924</b>	<b>523,234</b>	<b>523,234</b>	<b>-</b>	<b>38,628</b>	<b>93%</b>

**East Bay Innovation Academy**

Budget vs. Actuals

As of May close

	Actual			Budget vs. Actual			Budget					
	Mar	Apr	May	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Previous Month's Forecast	Current Forecast	Variance (Previous vs. Current Forecast)	Forecast Remaining	% of Forecast Spent
<b>4000 Books &amp; Supplies</b>	-	-	-									
4100 Approved Textbooks & Core Curricula Materials	-	1,831	657	12,652	11,880	(772)	12,150	11,995	12,652	(657)	-	100%
4200 Books & Other Reference Materials	1,312	340	34	4,827	2,053	(2,774)	2,053	4,793	4,827	(34)	0.00	100%
4300 Materials & Supplies	1,206	1,587	1,195	15,722	13,905	(1,817)	13,905	14,527	15,722	(1,195)	-	100%
4320 Educational Software	245	185	3,000	61,332	63,360	2,028	64,800	134,192	97,192	37,000	35,860	63%
4330 Office Supplies	1,373	3,498	281	16,735	20,256	3,521	22,097	17,562	17,562	-	827	95%
4352 Quest (After School)	-	-	-	4,811	4,583	(228)	5,000	5,000	4,811	189	-	100%
4400 Noncapitalized Equipment	-	-	-	3,367	13,861	10,495	15,122	11,622	11,622	-	8,255	29%
4410 Classroom Furniture, Equipment & Supplies	974	56	383	11,836.72	10,560	(1,277)	10,800	11,454	11,837	(383)	-	100%
4420 Computers (individual items less than \$5k)	-	97	-	23,553	90,258	66,705	92,100	35,899	35,896	3	12,343	66%
4423 Staff Computers	-	140	761	14,467	4,845	(9,622)	4,944	13,733	14,368	(635)	(99.00)	101%
4430 Non Classroom Related Furniture, Equipment & Sup	261	-	841	5,579	248	(5,332)	270	4,738	5,579	(841)	-	100%
4710 Student Food Services	13,267	7,721	5,425	55,057	40,988	(14,069)	45,542	56,942	61,942	(5,000)	6,885	89%
<b>SUBTOTAL - Books and Supplies</b>	<b>18,638</b>	<b>15,455</b>	<b>12,576</b>	<b>229,937</b>	<b>276,797</b>	<b>46,860</b>	<b>288,783</b>	<b>322,456</b>	<b>294,009</b>	<b>28,448</b>	<b>64,071</b>	<b>78%</b>



**East Bay Innovation Academy**

Budget vs. Actuals  
As of May close

	Actual			Budget vs. Actual			Budget					
	Mar	Apr	May	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Previous Month's Forecast	Current Forecast	Variance (Previous vs. Current Forecast)	Forecast Remaining	% of Forecast Spent
<b>5000 Services &amp; Other Operating Expenses</b>												
5220 Travel and Lodging	-	-	(19)	889	1,620	731	1,800	1,800	1,800	-	911	49%
5300 Dues & Memberships	-	218	260	4,462	6,796	2,334	7,551	6,051	6,051	-	1,589	74%
5450 Insurance - Other	2,284	-	1,984	35,017	29,531	(5,486)	29,531	35,317	35,017	300	0.00	100%
5515 Janitorial, Gardening Services & Supplies	4,922	6,513	63,677	121,397	87,674	(33,723)	97,416	130,416	130,416	-	9,019	93%
5520 Security	-	-	-	-	-	-	-	-	-	-	-	-
5535 Utilities - All Utilities	5,647	3,766	4,762	51,292	72,188	20,895	78,750	60,150	82,150	(22,000)	30,858	62%
5611 Prop 39 Related Costs	37,237	-	26,487	138,197	166,878	28,681	222,504	148,947	148,947	-	10,750	93%
5615 Repairs and Maintenance - Building	-	-	240	1,311	3,728	2,417	4,142	4,142	4,142	-	2,831	32%
5616 Repairs and Maintenance - Computers	1,740	480	-	11,081	13,553	2,471	16,263	14,263	13,263	1,000	2,182	84%
5803 Accounting Fees	-	1,839	39	2,265	4,120	1,855	8,240	8,240	8,240	-	5,975	27%
5809 Banking Fees	45	60	168	903	567	(336)	618	968	818	150	(85)	110%
5810 Intersession	17,825	3,801	11,577	76,635	101,250	24,615	135,000	125,400	125,400	-	48,765	61%
5812 Business Services	42,833	10,833	10,833	119,835	125,125	5,290	136,500	130,000	130,000	-	10,165	92%
5815 Consultants - Instructional	4,270	-	2,441	20,254	10,622	(9,632)	10,622	26,622	26,622	-	6,368	76%
5820 Consultants - Non Instructional - Custom 1	-	1,169	1,144	3,233	-	(3,233)	-	3,500	3,500	-	268	92%
5824 District Oversight Fees	-	-	-	-	24,969	24,969	33,292	31,557	31,557	-	31,557	0%
5833 Fines and Penalties	61	-	-	61	-	(61)	-	61	61	-	-	100%
5836 Fingerprinting	57	57	121	1,295	2,419	1,124	2,474	1,396	1,396	-	101	93%
5839 Fundraising Expenses	785	3,412	239	14,781	10,247	(4,533)	11,386	14,542	14,781	(239)	0.00	100%
5843 Interest - Loans Less than 1 Year	-	62	-	443	-	(443)	8,309	480	480	-	37	92%
5845 Legal Fees	3,827	5,021	6,965	66,089	49,500	(16,589)	55,000	60,000	70,000	(10,000)	3,911	94%
5851 Marketing and Student Recruiting	-	268	-	2,054	1,001	(1,053)	1,112	2,054	2,054	-	-	100%
5857 Payroll Fees	351	358	342	3,749	2,833	(916)	3,090	4,080	4,080	-	331	92%
5860 Printing and Reproduction	-	-	-	-	167	167	185	185	185	-	185	0%
5861 Prior Yr Exp (not accrued)	-	-	-	9,261	-	(9,261)	-	9,261	9,261	-	-	100%
5863 Professional Development	9,828	3,582	2,197	49,622	23,288	(26,334)	25,405	47,425	49,622	(2,197)	-	100%
5866 SPED MH Day/NPS Services	24,904	31,406	35,411	227,157	231,683	4,526	252,745	256,010	256,010	-	28,853	89%
5869 Special Education Contract Instructors	11,295	3,674	13,218	84,556	90,000	5,444	100,000	100,000	100,000	-	15,444	85%
5872 Special Education Encroachment	-	-	-	-	-	-	9,791	10,206	10,206	-	10,206	0%
5875 Staff Recruiting	767	3,303	669	8,533	3,884	(4,648)	4,316	7,864	8,533	(669)	0.00	100%
5878 Student Assessment	-	250	550	1,918	-	(1,918)	-	1,368	1,918	(550)	-	100%
5881 Student Information System	-	-	-	25,000	9,154	(15,846)	12,206	20,103	20,103	-	(4,897)	124%
5884 Substitutes	2,120	-	12,049	40,640	5,834	(34,805)	6,483	36,042	41,042	(5,000)	402	99%
5887 Technology Services	523	4,638	8,993	36,684	13,320	(23,364)	14,800	30,800	36,800	(6,000)	116	100%
5899 Miscellaneous Operating Expenses	438	(1,354)	(16,271)	16,628	-	(16,628)	-	32,900	18,900	14,000	2,272	88%
5900 Communications	1,246	3,420	1,888	16,755	18,866	2,112	20,581	16,000	16,755	(755)	-	100%
5905 Communications - Cell Phones	-	-	-	-	110	110	120	120	120	-	120	0%
5915 Postage and Delivery	112	155	-	1,129	1,800	671	2,000	1,500	1,500	-	371	75%
<b>SUBTOTAL - Services &amp; Other Operating Exp.</b>	<b>173,296</b>	<b>86,748</b>	<b>189,964</b>	<b>1,193,124</b>	<b>1,112,726</b>	<b>(80,398)</b>	<b>1,312,232</b>	<b>1,379,769</b>	<b>1,411,728</b>	<b>(31,960)</b>	<b>218,605</b>	<b>85%</b>

**East Bay Innovation Academy**

Budget vs. Actuals

As of May close

	Actual			Budget vs. Actual			Budget					
	Mar	Apr	May	Actual YTD	Budget YTD	Variance (YTD less Budget)	Approved Budget	Previous Month's Forecast	Current Forecast	Variance (Previous vs. Current Forecast)	Forecast Remaining	% of Forecast Spent
<b>6000 Capital Outlay</b>												
6100 Sites & Improvement of Sites	-	-	-	-	-	-	-	-	-	-	-	-
6200 Buildings & Improvement of Buildings	-	-	-	-	-	-	-	-	-	-	-	-
6300 School Libraries	-	-	-	-	-	-	-	-	-	-	-	-
6400 Equipment	-	-	-	-	-	-	-	-	-	-	-	-
6410 Computers (capitalizable items)	-	-	-	-	-	-	-	-	-	-	-	-
6420 Furniture (capitalizable items)	-	-	-	-	-	-	-	-	-	-	-	-
6430 Other Equipment (capitalizable items)	-	-	-	-	-	-	-	-	-	-	-	-
6500 Equipment Replacement	-	-	-	-	-	-	-	-	-	-	-	-
<b>SUBTOTAL - Capital Outlay</b>	-	-	-	-	-	-	-	-	-	-	-	-
<b>TOTAL EXPENSES</b>	<b>468,592</b>	<b>355,312</b>	<b>474,653</b>	<b>4,123,158</b>	<b>4,094,265</b>	<b>(28,894)</b>	<b>4,553,299</b>	<b>4,676,476</b>	<b>4,679,988</b>	<b>(3,512)</b>	<b>556,830</b>	<b>88%</b>
<b>6900 Total Depreciation (includes Prior Years)</b>	-	-	-	-	-	-	-	-	-	-	-	-
<b>TOTAL EXPENSES including Depreciation</b>	<b>468,592</b>	<b>355,312</b>	<b>474,653</b>	<b>4,123,158</b>	<b>4,094,265</b>	<b>(28,894)</b>	<b>4,553,299</b>	<b>4,676,476</b>	<b>4,679,988</b>	<b>(3,512)</b>	<b>556,830</b>	<b>88%</b>

# Cover Sheet

## Review and Approve 2017-2018 Budget

**Section:** VI. Finance/Business Operations  
**Item:** B. Review and Approve 2017-2018 Budget  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:**  
June 2017 - EBIA 17-18 Budget MYP -Charter Alt Form REVISED\_OUSD.pdf  
June 2017 - EBIA-MYP DRAFT for board approval-2017.06.08-mc.pdf

**CHARTER SCHOOL  
BUDGET REPORT - ALTERNATIVE FORM**

**CHARTER SCHOOL CERTIFICATION**

**Charter School Name:** East Bay Innovation Academy  
 (name continued)  
**CDS #:** 01-61259-0129932  
**Charter Approving Entity:** Oakland Unified School District  
**County:** Alameda  
**Charter #:** 1620  
**Fiscal Year:** 2017-18

To the entity that approved the charter school:  
 (  x ) 2017-18 CHARTER SCHOOL BUDGET FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been approved, and is hereby filed by the charter school pursuant to *Education Code* Section 47604.33.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
 Charter School Official  
 (Original signature required)  
 Print Name: David Hardin Title: Interim Executive Director

To the County Superintendent of Schools:  
 (  x ) 2017-18 CHARTER SCHOOL BUDGET FINANCIAL REPORT -- ALTERNATIVE FORM: This report is hereby filed with the County Superintendent pursuant to *Education Code* Section 47604.33.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
 Authorized Representative of  
 Charter Approving Entity  
 (Original signature required)  
 Print Name: Minh Co Title: Accounting Manager

For additional information on the BUDGET, please contact:

For Approving Entity:

Minh Co  
 Name  
Accounting Manager  
 Title  
(510) 331-0324  
 Telephone  
minh.co@ousd.org  
 E-mail address

For Charter School:

Michelle Cho  
 Name  
Senior Client Manager  
 Title  
510-663-3500  
 Telephone  
michelle.cho@edtec.com  
 E-mail address

(      ) 2017-18 CHARTER SCHOOL BUDGET FINANCIAL REPORT -- ALTERNATIVE FORM: This report verified for mathematical accuracy by the County Superintendent of Schools pursuant to *Education Code* Section 47604.33.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
 ACOE District Advisor

**CHARTER SCHOOL  
BUDGET REPORT - ALTERNATIVE FORM**

**Charter School Name:** East Bay Innovation Academy  
 (name continued) \_\_\_\_\_  
**CDS #:** 01-61259-0129932  
**Charter Approving Entity:** Oakland Unified School District  
**County:** Alameda  
**Charter #:** 1620  
**Budgeting Period:** 2017/18

This charter school uses the following basis of accounting:

- Accrual Basis** (Applicable Capital Assets / Interest on Long-Term Debt / Long-Term Liabilities objects are 6900, 7438, 9400-9499, and 9660-9669)  
 **Modified Accrual Basis** (Applicable Capital Outlay / Debt Service objects are 6100-6170, 6200-6500, 7438, and 7439)

Description	Object Code	Est. Actuals Prior Year	Current Budget Year		Total
			Unrest.	Rest.	
<b>A. REVENUES</b>					
<b>1. LCFF Sources</b>					
State Aid - Current Year	8011	2,148,867.81	2,692,503.49		2,692,503.49
Education Protection Account State Aid - Current Year	8012	80,782.00	95,112.00		95,112.00
State Aid - Prior Years	8019	1,602.00	0.00		0.00
Tax Relief Subventions (for rev. limit funded schools)	8020-8039				0.00
County and District Taxes (for rev. limit funded schools)	8040-8079				0.00
Miscellaneous Funds (for rev. limit funded schools)	8080-8089				0.00
Charter Schools Funding in Lieu of Property Taxes	8096	924,481.33	1,088,475.99		1,088,475.99
Other LCFF/ Revenue Limit Transfers	8091, 8097				0.00
Total, LCFF/Revenue Limit Sources		3,155,733.14	3,876,091.49	0.00	3,876,091.49
<b>2. Federal Revenues</b>					
Every Student Succeeds Act (Titles I - V)	8290	17,617.00		17,400.00	17,400.00
Special Education - Federal	8181, 8182	198,940.80		322,375.00	322,375.00
Child Nutrition - Federal	8220	13,603.48		16,232.40	16,232.40
Other Federal Revenues	8110, 8260-8299	1,505.45			0.00
Total, Federal Revenues		231,666.73	0.00	356,007.40	356,007.40
<b>3. Other State Revenues</b>					
Special Education - State	StateRevSE	277,187.37		310,155.84	310,155.84
All Other State Revenues	StateRevAO	158,465.86	97,099.66	2,029.05	99,128.71
Total, Other State Revenues		435,653.23	97,099.66	312,184.89	409,284.55
<b>4. Other Local Revenues</b>					
All Other Local Revenues	LocalRevAO	879,118.68	644,784.03		644,784.03
Total, Local Revenues		879,118.68	644,784.03	0.00	644,784.03
<b>5. TOTAL REVENUES</b>					
		4,702,171.78	4,617,975.18	668,192.29	5,286,167.47
<b>B. EXPENDITURES</b>					
<b>1. Certificated Salaries</b>					
Certificated Teachers' Salaries	1100	1,619,683.84	1,558,246.29	202,930.00	1,761,176.29
Certificated Pupil Support Salaries	1200	0.00	0.00	0.00	0.00
Certificated Supervisors' and Administrators' Salaries	1300	417,781.40	386,363.30	35,844.00	422,207.30
Other Certificated Salaries	1900	0.00	80,000.00	0.00	80,000.00
Total, Certificated Salaries		2,037,465.24	2,024,609.59	238,774.00	2,263,383.59
<b>2. Non-certificated Salaries</b>					
Non-certificated Instructional Aides' Salaries	2100	172,421.00	78,874.33	122,631.00	201,505.33
Non-certificated Support Salaries	2200	0.00	0.00	0.00	0.00
Non-certificated Supervisors' and Administrators' Sal.	2300	55,054.17	128,750.00	0.00	128,750.00
Clerical and Office Salaries	2400	144,127.95	191,950.00	0.00	191,950.00
Other Non-certificated Salaries	2900	41,948.25	44,510.00	0.00	44,510.00
Total, Non-certificated Salaries		413,551.37	444,084.33	122,631.00	566,715.33

**CHARTER SCHOOL  
BUDGET REPORT - ALTERNATIVE FORM**

Charter School Name: East Bay Innovation Academy  
(name continued) \_\_\_\_\_

Description	Object Code	Est. Actuals Prior Year	Current Budget Year		Total
			Unrest.	Rest.	
<b>3. Employee Benefits</b>					
STRS	3101-3102	232,819.98	259,113.43	37,932.97	297,046.40
PERS	3201-3202	0.00	0.00	0.00	0.00
OASDI / Medicare / Alternative	3301-3302	73,101.42	77,854.03	11,397.46	89,251.48
Health and Welfare Benefits	3401-3402	171,856.05	177,619.34	26,002.62	203,621.97
Unemployment Insurance	3501-3502	21,345.46	20,892.45	3,058.55	23,951.00
Workers' Compensation Insurance	3601-3602	24,725.88	29,624.33	4,336.86	33,961.19
OPEB, Allocated	3701-3702	0.00	0.00	0.00	0.00
OPEB, Active Employees	3751-3752	0.00	0.00	0.00	0.00
Other Employee Benefits	3901-3902	0.00	0.00	0.00	0.00
Total, Employee Benefits		523,848.79	565,103.57	82,728.46	647,832.03
<b>4. Books and Supplies</b>					
Approved Textbooks and Core Curricula Materials	4100	12,651.87	13,797.54	0.00	13,797.54
Books and Other Reference Materials	4200	4,826.52	2,191.29	0.00	2,191.29
Materials and Supplies	4300	135,287.02	75,926.52	0.00	75,926.52
Noncapitalized Equipment	4400	79,300.91	87,036.33	0.00	87,036.33
Food	4700	61,942.40	22,319.55	18,261.45	40,581.00
Total, Books and Supplies		294,008.72	201,271.23	18,261.45	219,532.68
<b>5. Services and Other Operating Expenditures</b>					
Subagreements for Services	5100	0.00	0.00	0.00	0.00
Travel and Conferences	5200	1,800.00	2,282.59	0.00	2,282.59
Dues and Memberships	5300	6,051.00	6,172.02	0.00	6,172.02
Insurance	5400	35,017.01	33,091.61	0.00	33,091.61
Operations and Housekeeping Services	5500	212,565.56	253,409.00	0.00	253,409.00
Rentals, Leases, Repairs, and Noncap. Improvements	5600	166,352.24	221,057.89	0.00	221,057.89
Professional/Consulting Services & Operating Expend.	5800	971,567.95	505,768.68	512,818.82	1,018,587.49
Communications	5900	18,374.65	20,012.40	0.00	20,012.40
Total, Services and Other Operating Expenditures		1,411,728.41	1,041,794.19	512,818.82	1,554,613.01
<b>6. Capital Outlay (Objects 6100-6170, 6200-6500 - modified accrual basis)</b>					
Land and Improvements of Land	6100-6170				0.00
Buildings and Improvements of Buildings	6200				0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300				0.00
Equipment	6400				0.00
Equipment Replacement	6500				0.00
<i>Depreciation Expense (for full accrual basis only)</i>	6900				0.00
Total, Capital Outlay		0.00	0.00	0.00	0.00
<b>7. Other Outgo</b>					
Tuition to Other Schools	7110-7143				0.00
Transfers of Pass-through Revenues to Other LEAs	7211-7213				0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE				0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO				0.00
All Other Transfers	7281-7299				0.00
Debt Service:					
Interest	7438				0.00
Principal	7439				0.00
Total, Other Outgo		0.00	0.00	0.00	0.00
<b>8. TOTAL EXPENDITURES</b>		4,680,602.53	4,276,862.91	975,213.73	5,252,076.64
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>		21,569.25	341,112.27	(307,021.44)	34,090.82

**CHARTER SCHOOL  
BUDGET REPORT - ALTERNATIVE FORM**

Charter School Name: East Bay Innovation Academy  
(name continued) \_\_\_\_\_

Description	Object Code	Est. Actuals Prior Year	Current Budget Year		Total
			Unrest.	Rest.	
<b>D. OTHER FINANCING SOURCES / USES</b>					
1. Other Sources	8930-8979				0.00
2. Less: Other Uses	7630-7699				0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999		(307,021.44)	307,021.44	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		0.00	(307,021.44)	307,021.44	0.00
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)</b>		21,569.25	34,090.83	(0.00)	34,090.82
<b>F. FUND BALANCE, RESERVES</b>					
1. Beginning Fund Balance					
a. As of July 1	9791	477,576.18	462,205.25		462,205.25
b. Adjustments to Beginning Balance	9793, 9795	(36,940.18)			0.00
c. Adjusted Beginning Balance		440,636.00	462,205.25	0.00	462,205.25
2. Ending Fund Balance, June 30 (E + F.1.c.)		462,205.25	496,296.08	(0.00)	496,296.07
Components of Ending Fund Balance					
a. Nonspendable					
Revolving Cash	9711				0.00
Stores	9712				0.00
Prepaid Expenditures	9713				0.00
All Others	9719				0.00
b. Restricted	9740				0.00
c. Committed					
Stabilization Arrangements	9750				0.00
Other Commitments	9760				0.00
d. Assigned					
Other Assignments	9780	50,378.00	50,378.00		50,378.00
e. Unassigned/Unappropriated					
Reserve for Economic Uncertainties	9789	140,418.08	157,562.30		157,562.30
Unassigned / Unappropriated Amount	9790	271,409.18	288,355.78	(0.00)	288,355.78

**CHARTER SCHOOL  
MULTI-YEAR PROJECTION - ALTERNATIVE FORM**

**Charter School Name:** East Bay Innovation Academy  
 (name continued)  
**CDS #:** 01-61259-0129932  
**Charter Approving Entity:** Oakland Unified School District  
**County:** Alameda  
**Charter #:** 1620  
**Fiscal Year:** 2017/18

This charter school uses the following basis of accounting:

- Accrual Basis** (Applicable Capital Assets / Interest on Long-Term Debt / Long-Term Liabilities objects are 6900, 7438, 9400-9499, and 9660-9669)  
 **Modified Accrual Basis** (Applicable Capital Outlay / Debt Service objects are 6100-6170, 6200-6500, 7438, and 7439)

Description	Object Code	FY 2017/18			Totals for 2018/19	Totals for 2019/20
		Unrestricted	Restricted	Total		
<b>A. REVENUES</b>						
<b>1. LCFF Sources</b>						
State Aid - Current Year	8011	2,692,503.49	0.00	2,692,503.49	3,465,409.88	4,348,520.81
Education Protection Account State Aid - Current Year	8012	95,112.00	0.00	95,112.00	114,664.00	135,824.00
State Aid - Prior Years	8019	0.00	0.00	0.00		
Tax Relief Subventions (for rev. limit funded schools)	8020-8039	0.00	0.00	0.00		
County and District Taxes (for rev. limit funded schools)	8040-8079	0.00	0.00	0.00		
Miscellaneous Funds (for rev. limit funded schools)	8080-8089	0.00	0.00	0.00		
Charter Schools Funding in Lieu of Property Taxes	8096	1,088,475.99	0.00	1,088,475.99	1,312,232.02	1,554,390.23
Other LCFF/ Revenue Limit Transfers	8091, 8097	0.00	0.00	0.00		
<b>Total, LCFF/Revenue Limit Sources</b>		<b>3,876,091.49</b>	<b>0.00</b>	<b>3,876,091.49</b>	<b>4,892,305.90</b>	<b>6,038,735.04</b>
<b>2. Federal Revenues</b>						
Every Student Succeeds Act (Titles I - V)	8290	0.00	17,400.00	17,400.00	21,114.00	26,292.00
Special Education - Federal	8181, 8182	0.00	322,375.00	322,375.00	338,025.00	356,783.00
Child Nutrition - Federal	8220	0.00	16,232.40	16,232.40	19,666.80	23,392.80
Other Federal Revenues	8110, 8260-8299	0.00	0.00	0.00		
<b>Total, Federal Revenues</b>		<b>0.00</b>	<b>356,007.40</b>	<b>356,007.40</b>	<b>378,805.80</b>	<b>406,467.80</b>
<b>3. Other State Revenues</b>						
Special Education - State	StateRevSE	0.00	310,155.84	310,155.84	360,404.48	414,785.68
All Other State Revenues	StateRevAO	97,099.66	2,029.05	99,128.71	120,951.27	145,357.86
<b>Total, Other State Revenues</b>		<b>97,099.66</b>	<b>312,184.89</b>	<b>409,284.55</b>	<b>481,355.75</b>	<b>560,143.54</b>
<b>4. Other Local Revenues</b>						
All Other Local Revenues	LocalRevAO	644,784.03	0.00	644,784.03	483,618.45	447,873.84
<b>Total, Local Revenues</b>		<b>644,784.03</b>	<b>0.00</b>	<b>644,784.03</b>	<b>483,618.45</b>	<b>447,873.84</b>
<b>5. TOTAL REVENUES</b>		<b>4,617,975.18</b>	<b>668,192.29</b>	<b>5,286,167.47</b>	<b>6,236,085.90</b>	<b>7,453,220.22</b>
<b>B. EXPENDITURES</b>						
<b>1. Certificated Salaries</b>						
Certificated Teachers' Salaries	1100	1,558,246.29	202,930.00	1,761,176.29	2,144,536.54	2,626,720.67
Certificated Pupil Support Salaries	1200	0.00	0.00	0.00	0.00	0.00
Certificated Supervisors' and Administrators' Salaries	1300	386,363.30	35,844.00	422,207.30	443,317.67	456,617.19
Other Certificated Salaries	1900	80,000.00	0.00	80,000.00	82,400.00	84,872.00
<b>Total, Certificated Salaries</b>		<b>2,024,609.59</b>	<b>238,774.00</b>	<b>2,263,383.59</b>	<b>2,670,254.20</b>	<b>3,168,209.87</b>
<b>2. Non-certificated Salaries</b>						
Non-certificated Instructional Aides' Salaries	2100	78,874.33	122,631.00	201,505.33	219,567.16	226,154.17
Non-certificated Support Salaries	2200	0.00	0.00	0.00	0.00	0.00
Non-certificated Supervisors' and Administrators' Sal.	2300	128,750.00	0.00	128,750.00	132,687.50	136,746.88
Clerical and Office Salaries	2400	191,950.00	0.00	191,950.00	197,830.90	203,894.35
Other Non-certificated Salaries	2900	44,510.00	0.00	44,510.00	45,845.30	47,220.66
<b>Total, Non-certificated Salaries</b>		<b>444,084.33</b>	<b>122,631.00</b>	<b>566,715.33</b>	<b>595,930.86</b>	<b>614,016.06</b>



**CHARTER SCHOOL  
MULTI-YEAR PROJECTION - ALTERNATIVE FORM**

**Charter School Name:** East Bay Innovation Academy  
(name continued)

Description	Object Code	FY 2017/18			Totals for 2018/19	Totals for 2019/20
		Unrestricted	Restricted	Total		
<b>3. Employee Benefits</b>						
STRS	3101-3102	259,113.43	37,932.97	297,046.40	400,535.00	535,187.70
PERS	3201-3202	0.00	0.00	0.00	0.00	0.00
OASDI / Medicare / Alternative	3301-3302	77,854.03	11,397.46	89,251.48	97,731.26	106,767.67
Health and Welfare Benefits	3401-3402	177,619.34	26,002.62	203,621.97	246,608.83	302,404.07
Unemployment Insurance	3501-3502	20,892.45	3,058.55	23,951.00	26,331.63	29,965.91
Workers' Compensation Insurance	3601-3602	29,624.33	4,336.86	33,961.19	39,194.22	45,386.71
OPEB, Allocated	3701-3702	0.00	0.00	0.00	0.00	0.00
OPEB, Active Employees	3751-3752	0.00	0.00	0.00	0.00	0.00
Other Employee Benefits	3901-3902	0.00	0.00	0.00	0.00	0.00
<b>Total, Employee Benefits</b>		<b>565,103.57</b>	<b>82,728.46</b>	<b>647,832.03</b>	<b>810,400.93</b>	<b>1,019,712.06</b>
<b>4. Books and Supplies</b>						
Approved Textbooks and Core Curricula Materials	4100	13,797.54	0.00	13,797.54	17,051.12	20,687.19
Books and Other Reference Materials	4200	2,191.29	0.00	2,191.29	2,632.47	3,191.74
Materials and Supplies	4300	75,926.52	0.00	75,926.52	137,944.38	166,355.13
Noncapitalized Equipment	4400	87,036.33	0.00	87,036.33	110,076.93	214,581.14
Food	4700	22,319.55	18,261.45	40,581.00	49,167.00	58,482.00
<b>Total, Books and Supplies</b>		<b>201,271.23</b>	<b>18,261.45</b>	<b>219,532.68</b>	<b>316,871.89</b>	<b>463,297.20</b>
<b>5. Services and Other Operating Expenditures</b>						
Subagreements for Services	5100	0.00	0.00	0.00	0.00	0.00
Travel and Conferences	5200	2,282.59	0.00	2,282.59	2,742.15	3,324.73
Dues and Memberships	5300	6,172.02	0.00	6,172.02	6,295.46	6,421.37
Insurance	5400	33,091.61	0.00	33,091.61	40,894.88	49,615.53
Operations and Housekeeping Services	5500	253,409.00	0.00	253,409.00	288,477.18	294,246.72
Rentals, Leases, Repairs, and Noncap. Improvements	5600	221,057.89	0.00	221,057.89	267,525.64	319,405.06
Professional/Consulting Services and Operating Expend.	5800	505,768.68	512,818.82	1,018,587.49	1,156,842.91	1,205,156.66
Communications	5900	20,012.40	0.00	20,012.40	20,412.65	20,820.90
<b>Total, Services and Other Operating Expenditures</b>		<b>1,041,794.19</b>	<b>512,818.82</b>	<b>1,554,613.01</b>	<b>1,783,190.88</b>	<b>1,898,990.99</b>
<b>6. Capital Outlay (Objects 6100-6170, 6200-6500 for mod. accrual basis)</b>						
Land and Improvements of Land	6100-6170	0.00	0.00	0.00		
Buildings and Improvements of Buildings	6200	0.00	0.00	0.00		
Books and Media for New School Libraries or Major Expansion of School Libraries	6300	0.00	0.00	0.00		
Equipment	6400	0.00	0.00	0.00		
Equipment Replacement	6500	0.00	0.00	0.00		
Depreciation Expense (for full accrual only)	6900	0.00	0.00	0.00		
<b>Total, Capital Outlay</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>7. Other Outgo</b>						
Tuition to Other Schools	7110-7143	0.00	0.00	0.00		
Transfers of Pass-through Revenues to Other LEAs	7211-7213	0.00	0.00	0.00		
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE	0.00	0.00	0.00		
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0.00	0.00	0.00		
All Other Transfers	7281-7299	0.00	0.00	0.00		
Debt Service:						
Interest	7438	0.00	0.00	0.00		
Principal	7439	0.00	0.00	0.00		
<b>Total, Other Outgo</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>8. TOTAL EXPENDITURES</b>		<b>4,276,862.91</b>	<b>975,213.73</b>	<b>5,252,076.64</b>	<b>6,176,648.76</b>	<b>7,164,226.17</b>
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>		<b>341,112.27</b>	<b>(307,021.44)</b>	<b>34,090.82</b>	<b>59,437.14</b>	<b>288,994.05</b>

**CHARTER SCHOOL  
MULTI-YEAR PROJECTION - ALTERNATIVE FORM**

Charter School Name: East Bay Innovation Academy  
(name continued) \_\_\_\_\_

Description	Object Code	FY 2017/18			Totals for 2018/19	Totals for 2019/20
		Unrestricted	Restricted	Total		
<b>D. OTHER FINANCING SOURCES / USES</b>						
1. Other Sources	8930-8979	0.00	0.00	0.00		
2. Less: Other Uses	7630-7699	0.00	0.00	0.00		
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(307,021.44)	307,021.44	0.00		
4. TOTAL OTHER FINANCING SOURCES / USES		(307,021.44)	307,021.44	0.00	0.00	0.00
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)</b>						
		34,090.83	(0.00)	34,090.82	59,437.14	288,994.05
<b>F. FUND BALANCE, RESERVES</b>						
1. Beginning Fund Balance						
a. As of July 1	9791	462,205.25	0.00	462,205.25	496,296.07	555,733.21
b. Adjustments to Beginning Balance	9793, 9795	0.00	0.00	0.00		
c. Adjusted Beginning Balance		462,205.25	0.00	462,205.25	496,296.07	555,733.21
2. Ending Fund Balance, June 30 (E + F.1.c.)		496,296.08	(0.00)	496,296.07	555,733.21	844,727.27
Components of Ending Fund Balance						
a. Nonspendable						
Revolving Cash	9711	0.00		0.00		
Stores	9712	0.00	0.00	0.00		
Prepaid Expenditures	9713	0.00	0.00	0.00		
All Others	9719	0.00	0.00	0.00		
b. Restricted						
	9740		0.00	0.00		
c. Committed						
Stabilization Arrangements	9750	0.00		0.00		
Other Commitments	9760	0.00		0.00		
d. Assigned						
Other Assignments	9780	50,378.00		50,378.00	50,378.00	50,378.00
e. Unassigned/Unappropriated						
Reserve for Economic Uncertainties	9789	157,562.30	0.00	157,562.30	185,299.46	214,926.79
Undesignated / Unappropriated Amount	9790	288,355.78	(0.00)	288,355.78	320,055.75	579,422.48

LCFF Calculator Universal Assumptions								
East Bay Innovation Academy (129932)								
Summary of Funding								
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	
Target	\$ -	\$ 1,526,202	\$ 2,506,008	\$ 3,154,223	\$ 3,876,219	\$ 4,892,305	\$ 6,038,886	
Floor	-	1,565,963	2,516,979	3,063,470	3,606,866	4,348,323	5,150,758	
Applied Formula: Target or Floor	FLOOR	TARGET	TARGET	TARGET	TARGET	TARGET	TARGET	
Remaining Need after Gap (informational only)	-	-	-	-	-	-	-	
Current Year Gap Funding	-	-	-	-	-	-	-	
Miscellaneous Adjustments	-	-	-	-	-	-	-	
Economic Recovery Target	-	-	-	-	-	-	-	
Additional State Aid	-	-	-	-	-	-	-	
<b>Total Phase-In Entitlement</b>	\$ -	\$ 1,526,202	\$ 2,506,008	\$ 3,154,223	\$ 3,876,219	\$ 4,892,305	\$ 6,038,886	
Components of LCFF By Object Code								
	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
8011 - State Aid	\$ -	\$ -	\$ 1,123,144	\$ 1,750,479	\$ 2,148,960	\$ 2,692,643	\$ 3,465,424	\$ 4,348,689
8011 - Fair Share	-	-	-	-	-	-	-	-
8311 & 8590 - Categoricals	-	-	-	-	-	-	-	-
EPA (for LCFF Calculation purposes)	-	-	41,294	66,372	80,783	95,112	114,664	135,824
Local Revenue Sources:								
8021 to 8089 - Property Taxes	-	-	-	-	-	-	-	-
8096 - In-Lieu of Property Taxes	-	-	361,764	689,157	924,480	1,088,464	1,312,217	1,554,373
Property Taxes net of in-lieu	-	-	-	-	-	-	-	-
<b>TOTAL FUNDING</b>	\$ -	\$ -	\$ 1,526,202	\$ 2,506,008	\$ 3,154,223	\$ 3,876,219	\$ 4,892,305	\$ 6,038,886
Basid Aid Status		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Less: Excess Taxes	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Less: EPA in Excess to LCFF Funding	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Phase-In Entitlement</b>	\$ -	\$ -	\$ 1,526,202	\$ 2,506,008	\$ 3,154,223	\$ 3,876,219	\$ 4,892,305	\$ 6,038,886
8012 - EPA Receipts (for budget & cashflow)	\$ -	\$ -	\$ 41,334	\$ 66,290	\$ 80,825	\$ 95,112	\$ 114,664	\$ 135,824
Summary of Student Population								
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	
<b>Unduplicated Pupil Population</b>								
Agency Unduplicated Pupil Count	-	30.00	57.00	90.00	108.00	131.00	156.00	
COE Unduplicated Pupil Count	-	-	-	-	-	-	-	
Total Unduplicated pupil Count	-	30.00	57.00	90.00	108.00	131.00	156.00	
Rolling %, Supplemental Grant	0.0000%	13.8900%	15.0800%	18.0800%	20.1700%	21.5500%	21.5800%	
Rolling %, Concentration Grant	0.0000%	13.8900%	15.0800%	18.0800%	20.1700%	21.5500%	21.5800%	
<b>FUNDED ADA</b>								
<b>Adjusted Base Grant ADA</b>	Current Year	Current Year	Current Year	Current Year	Current Year	Current Year	Current Year	
Grades TK-3	-	-	-	-	-	-	-	
Grades 4-6	-	132.37	112.71	112.73	119.04	119.04	119.04	
Grades 7-8	-	74.10	219.15	235.32	232.32	238.08	238.08	
Grades 9-12	-	-	-	55.86	124.20	216.20	322.00	
<b>Total Adjusted Base Grant ADA</b>	-	<b>206.47</b>	<b>331.86</b>	<b>403.91</b>	<b>475.56</b>	<b>573.32</b>	<b>679.12</b>	
<b>Necessary Small School ADA</b>	Current year	Current year	Current year	Current year	Current year	Current year	Current year	
Grades TK-3	-	-	-	-	-	-	-	
Grades 4-6	-	-	-	-	-	-	-	
Grades 7-8	-	-	-	-	-	-	-	
Grades 9-12	-	-	-	-	-	-	-	
<b>Total Necessary Small School ADA</b>	-	-	-	-	-	-	-	
<b>Total Funded ADA</b>	<b>0.00</b>	<b>206.47</b>	<b>331.86</b>	<b>403.91</b>	<b>475.56</b>	<b>573.32</b>	<b>679.12</b>	
<b>ACTUAL ADA (Current Year Only)</b>								
Grades TK-3	-	-	-	-	-	-	-	
Grades 4-6	-	132.37	112.71	112.73	119.04	119.04	119.04	
Grades 7-8	-	74.10	219.15	235.32	232.32	238.08	238.08	
Grades 9-12	-	-	-	55.86	124.20	216.20	322.00	
<b>Total Actual ADA</b>	-	<b>206.47</b>	<b>331.86</b>	<b>403.91</b>	<b>475.56</b>	<b>573.32</b>	<b>679.12</b>	
Funded Difference (Funded ADA less Actual ADA)	-	-	-	-	-	-	-	
Minimum Proportionality Percentage (MPP)								
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	
Current year estimated supplemental and concentration grant funding in the LCAP year	\$	41,252	\$ 73,369	\$ 93,569	\$ 118,515	\$ 178,336	\$ 230,910	
Current year Minimum Proportionality Percentage (MPP)		2.78%	3.02%	3.06%	3.15%	3.78%	3.98%	

**East Bay Innovation Academy**

Multiyear Budget Summary DRAFT

	2016/17	2017/18	2017/18	2018/19	2019/20
	Current Forecast	Preliminary Budget	Notes	Preliminary Budget	Preliminary Budget
<b>SUMMARY</b>					
<b>Revenue</b>					
LCFF Entitlement	3,155,733	3,876,091		4,892,306	6,038,735
Federal Revenue	231,667	356,007		378,806	406,468
Other State Revenues	435,653	409,285		481,356	560,144
Local Revenues	40,986	179,434		271,168	375,674
Fundraising and Grants	838,133	465,350		212,450	72,200
<b>Total Revenue</b>	<b>4,702,172</b>	<b>5,286,167</b>		<b>6,236,086</b>	<b>7,453,220</b>
<b>Expenses</b>					
Compensation and Benefits	2,974,865	3,477,931		4,076,586	4,801,938
Books and Supplies	294,009	219,533		316,872	463,297
Services and Other Operating Expenditures	1,411,728	1,554,613		1,783,191	1,898,991
Depreciation	-	-		-	-
<b>Total Expenses</b>	<b>4,680,603</b>	<b>5,252,077</b>		<b>6,176,649</b>	<b>7,164,226</b>
<b>Operating Income</b>	<b>21,569</b>	<b>34,091</b>		<b>59,437</b>	<b>288,994</b>
<b>Fund Balance</b>					
Beginning Balance (Unaudited)	477,576	462,205		496,296	555,733
Audit Adjustment	(36,940)	-		-	-
Beginning Balance (Audited)	440,636	462,205		496,296	555,733
Operating Income	21,569	34,091		59,437	288,994
<b>Ending Fund Balance (including Depreciation)</b>	<b>462,205</b>	<b>496,296</b>		<b>555,733</b>	<b>844,727</b>
<b>Ending Fund Balance as a % of Expenses</b>	<b>10%</b>	<b>9%</b>		<b>9%</b>	<b>12%</b>
<b>Capital Outlay</b>	<b>-</b>	<b>-</b>		<b>-</b>	<b>-</b>

**East Bay Innovation Academy**  
Multiyear Budget Summary DRAFT

	2016/17	2017/18	2017/18	2018/19	2019/20
Detail	Current Forecast	Preliminary Budget	Notes	Preliminary Budget	Preliminary Budget
<b>Enrollment Breakdown</b>					
6	116	124	-	124	124
7	118	124	-	124	124
8	125	118	-	124	124
9	60	70	-	110	110
10	-	65	-	65	105
11	-	-	-	60	75
12	-	-	-	-	60
<b>Enrollment Summary</b>					
4-6	116	124	-	124	124
7-8	243	242	-	248	248
9-12	60	135	-	235	350
<b>Total Enrolled</b>	<b>419</b>	<b>501</b>	-	<b>607</b>	<b>722</b>
<b>ADA %</b>					
4-6	97%	96%	-	96%	96%
7-8	97%	96%	-	96%	96%
9-12	95%	92%	-	92%	92%
<b>Average</b>	<b>96%</b>	<b>95%</b>	-	<b>94%</b>	<b>94%</b>
<b>ADA</b>					
4-6	112.7	119.0	-	119.0	119.0
7-8	235.3	232.3	-	238.1	238.1
9-12	55.9	124.2	-	216.2	322.0
<b>Total ADA</b>	<b>403.9</b>	<b>475.6</b>	-	<b>573.3</b>	<b>679.1</b>
<b>Demographic Information</b>					
<b>Prior Year</b>					
ADA (P-2)	331.65	404	-	476	573
CALPADS Enrollment (for unduplicated % calc)	344	419	-	501	607
# Unduplicated Count (CALPADS)	57	90	-	108	131
# Free & Reduced Lunch (FRL) (CALPADS)	48	58	-	69	84
# ELL (CALPADS)	17	21	-	25	30
<b>Current Year</b>					
CALPADS Enrollment (for unduplicated % calc)	419	501	-	607	722
# Unduplicated Count (CALPADS)	90	108	-	131	156
# Free & Reduced Lunch (FRL) (CALPADS)	58	69	-	84	100
# ELL (CALPADS)	21	25	-	30	36
New Students	75	82	-	106	115

**East Bay Innovation Academy**  
Multiyear Budget Summary DRAFT

		2016/17	2017/18	2017/18	2018/19	2019/20
		Current Forecast	Preliminary Budget	Notes	Preliminary Budget	Preliminary Budget
<b>LCFF Entitlement</b>						
8011	Charter Schools LCFF - State Aid	2,148,868	2,692,503	Backfills State Aid	3,465,410	4,348,521
8012	Education Protection Account Entitlement	80,782	95,112	Greater of: \$200 per ADA or 23.7% of State Aid	114,664	135,824
8019	State Aid - Prior Years	1,602	-	-	-	-
8096	Charter Schools in Lieu of Property Taxes	924,481	1,088,476	In accordance with Local Property Tax of \$2288.83 per ADA	1,312,232	1,554,390
<b>SUBTOTAL - LCFF Entitlement</b>		<b>3,155,733</b>	<b>3,876,091</b>		<b>4,892,306</b>	<b>6,038,735</b>
<b>8100 Federal Revenue</b>						
8181	Special Education - Entitlement	43,688	52,375	\$125 per PY CBEDS Enrollment	62,625	75,875
8182	Special Education Reimbursement	155,253	270,000	Level 3 NPS reimbursed at 90% of cost for out of state, Seneca	275,400	280,908
8220	Child Nutrition Programs	13,603	16,232	Estimated reimbursement at 40% of total Food Service Cost.	19,667	23,393
8291	Title I	16,753	16,530	\$285 per Title I eligible student	20,079	25,032
8292	Title II	864	870	\$15 per Title I eligible student	1,035	1,260
8297	PY Federal - Not Accrued	1,505	-	-	-	-
<b>SUBTOTAL - Federal Income</b>		<b>231,667</b>	<b>356,007</b>		<b>378,806</b>	<b>406,468</b>
<b>8300 Other State Revenues</b>						
8319	Other State Apportionments - Prior Years	5,327	-	-	-	-
8381	Special Education - Entitlement (State)	211,469	244,438	\$514 per CY ADA	294,686	349,068
8382	Special Education Reimbursement (State)	65,718	65,718	80% of \$3K per service count. Ultimately it will be lesser of this estimate or the actual MH budget.	65,718	65,718
8520	Child Nutrition - State	741	2,029	Estimated reimbursement at 5% of total Food Service Cost.	2,458	2,924
8545	School Facilities Apportionments	-	-	-	-	-
8550	Mandated Cost Reimbursements	75,869	7,219	\$14 per PY 6-8 ADA, \$42 per 9-12 ADA	10,135	14,080
8560	State Lottery Revenue	76,339	89,881	\$189 per ADA per SSC	108,357	128,354
8590	All Other State Revenue	190	-	One time funds \$165/PY ADA	-	-
<b>SUBTOTAL - Other State Income</b>		<b>435,653</b>	<b>409,285</b>		<b>481,356</b>	<b>560,144</b>
<b>8600 Other Local Revenue</b>						
8634	Food Service Sales	12,762	12,174	Estimated reimbursement at 30% of total Food Service Cost.	14,750	17,545
8638	Merchandise Sales	342	-	-	-	-
8660	Interest	1	1	-	1	1
8690	Other Local Revenue	15,681	15,030	\$30 per Students Total	18,574	22,535
8701	Oakland Measure N	12,200	114,750	\$850 per grades 9-12 student	199,750	297,500
8702	Oakland Measure G	-	-	\$1M for charters, allocated by ADA% among OUSD charters	-	-
8703	Oakland Measure G1	-	37,478	Grades 6-8 enrollment, multiplied by 80% oakland resident, 20% LCFF %. Per pupil allocation (\$190 for staff, \$450 for art)	38,093	38,093
<b>SUBTOTAL - Local Revenues</b>		<b>40,986</b>	<b>179,434</b>		<b>271,168</b>	<b>375,674</b>
<b>8800 Donations/Fundraising</b>						
8801	Donations - Parents	129,270	175,350	\$350 per Students Total	212,450	72,200
8802	Donations - Private	591,863	240,000	Silicon Valley Schools, other	-	-
8803	Fundraising	117,000	50,000	NGLC	-	-
<b>SUBTOTAL - Fundraising and Grants</b>		<b>838,133</b>	<b>465,350</b>		<b>212,450</b>	<b>72,200</b>
<b>TOTAL REVENUE</b>		<b>4,702,172</b>	<b>5,286,167</b>		<b>6,236,086</b>	<b>7,453,220</b>

**East Bay Innovation Academy**  
Multiyear Budget Summary DRAFT

		2016/17	2017/18	2017/18	2018/19	2019/20
		Current Forecast	Preliminary Budget	Notes	Preliminary Budget	Preliminary Budget
<b>EXPENSES</b>						
<b>Compensation &amp; Benefits</b>						
<b>1000</b>	<b>Certificated Salaries</b>					
1100	Teachers Salaries	1,354,290	1,454,878	22.5 FTE (4 each ELA, math, history; science; 2 coding, 1.5 Spanish, 2 art, 1 PE)	1,764,058	2,172,116
1103	Teacher - Substitute Pay	28,420	36,591	0.56 FTE	45,226	62,111
1111	Teacher - Bonus	31,854	28,998	0 FTE	52,922	65,163
1148	Teacher - Special Ed	193,120	227,510	3.5 FTE, RSP	267,810	311,358
1150	Teacher - Summer School	12,000	13,200	0.1 FTE	14,520	15,972
1300	Certificated Supervisor & Administrator Salaries	133,900	133,900	1 FTE, Head of School	137,917	142,055
1311	Cert Admin - DESEL, Curr. Instr.	263,750	276,010	3 FTE, DESEL, 2 Curr. Instr.	284,290	292,819
1322	Cert Admin - Bonus	20,131	12,297	0 FTE	21,110	21,744
1940	Other Cert - UL Dean of Students	-	80,000	1 FTE	82,400	84,872
<b>SUBTOTAL - Certificated Employees</b>		<b>2,037,465</b>	<b>2,263,384</b>	-	<b>2,670,254</b>	<b>3,168,210</b>
<b>2000</b>	<b>Classified Salaries</b>					
2104	Classified - SPED	120,446	143,172	4.375 FTE	147,467	151,891
2105	Classified - Enrichment	51,975	58,333	1 FTE	72,100	74,263
2300	Classified Supervisor & Administrator Salaries	55,054	125,000	1 FTE	128,750	132,613
2311	Classified Admin - Bonus	-	3,750	0 FTE	3,938	4,134
2400	Classified Clerical & Office Salaries	71,128	94,080	2.5 FTE (1 Office Manager, 2 Supports)	96,902	99,809
2401	Classified Clerical & Office Salaries - Bonus	4,000	6,120	0 FTE	6,426	6,747
2402	Classified Clerical & Office Salaries - Community E	69,000	70,750	1 FTE	72,873	75,059
2403	Classified Clerical & Office Salaries - Tech Coordin.	-	21,000	0.5 FTE	21,630	22,279
2905	Other Classified - After School	27,090	28,350	0.75 FTE	29,201	30,077
2928	Other Classified - Food	14,858	16,160	0.755 FTE	16,645	17,144
<b>SUBTOTAL - Classified Employees</b>		<b>413,551</b>	<b>566,715</b>	-	<b>595,931</b>	<b>614,016</b>
<b>3000</b>	<b>Employee Benefits</b>					
3100	STRS	232,820	297,046	-	400,535	535,188
3300	OASDI-Medicare-Alternative	73,101	89,251	-	97,731	106,768
3400	Health & Welfare Benefits	171,856	203,622	-	246,609	302,404
3500	Unemployment Insurance	21,345	23,951	-	26,332	29,966
3600	Workers Comp Insurance	24,726	33,961	-	39,194	45,387
<b>SUBTOTAL - Employee Benefits</b>		<b>523,849</b>	<b>647,832</b>	-	<b>810,401</b>	<b>1,019,712</b>

**East Bay Innovation Academy**

Multiyear Budget Summary DRAFT

		2016/17	2017/18	2017/18	2018/19	2019/20
		Current Forecast	Preliminary Budget	Notes	Preliminary Budget	Preliminary Budget
<b>4000</b>	<b>Books &amp; Supplies</b>					
4100	Approved Textbooks & Core Curricula Materials	12,652	13,798	\$28 per Student	17,051	20,687
4200	Books & Other Reference Materials	4,827	2,191	\$97 per Teacher	2,632	3,192
4300	Materials & Supplies	15,722	15,791	\$32 per Student	19,514	23,675
4320	Educational Software	97,192	37,000	\$147 per Student	90,939	110,332
4330	Office Supplies	17,562	18,036	\$36 per Student	22,289	27,042
4352	Quest (After School)	4,811	5,100		5,202	5,306
4400	Noncapitalized Equipment	11,622	11,854		12,091	12,333
4410	Classroom Furniture, Equipment & Supplies	11,837	8,364		11,028	100,000
4420	Computers (individual items less than \$5k)	35,896	58,000	\$116 per Student	71,677	86,962
4423	Staff Computers	14,368	8,543		15,000	15,000
4430	Non Classroom Related Furniture, Equipment & Su	5,579	275		281	287
4710	Student Food Services	61,942	40,581	Assumes that 75% of total Food Service Cost is reimbursed	49,167	58,482
<b>SUBTOTAL - Books and Supplies</b>		<b>294,009</b>	<b>219,533</b>	-	<b>316,872</b>	<b>463,297</b>



**East Bay Innovation Academy**

Multiyear Budget Summary DRAFT

		2016/17	2017/18	2017/18	2018/19	2019/20
		Current Forecast	Preliminary Budget	Notes	Preliminary Budget	Preliminary Budget
<b>5000</b>	<b>Services &amp; Other Operating Expenses</b>					
5220	Travel and Lodging	1,800	2,283	\$101 per Teacher	2,742	3,325
5300	Dues & Memberships	6,051	6,172		6,295	6,421
5450	Insurance - Other	35,017	33,092	\$66 per Student	40,895	49,616
5515	Janitorial, Gardening Services & Supplies	130,416	149,616	Sergio at \$6.2k/mo + Roosevelt \$75K	152,608	155,660
5535	Utilities - All Utilities	82,150	103,793	Including \$42K for Roosevelt	135,869	138,586
5611	Prop 39 Related Costs	148,947	194,833	\$126K for Marshall, \$69K for Roosevelt	240,776	292,121
5615	Repairs and Maintenance - Building	4,142	4,225	\$352 per Monthly Rate	4,309	4,396
5616	Repairs and Maintenance - Computers	13,263	22,000		22,440	22,889
5803	Accounting Fees	8,240	8,405		8,573	8,744
5809	Banking Fees	818	834		851	868
5810	Intersession	125,400	137,775	\$275 per Student	166,925	202,521
5812	Business Services	130,000	84,000	Flat Fee \$84K	86,520	89,116
5815	Consultants - Instructional	26,622	45,000	Oakland Parks and Rec for both LL (\$26K) and UL (\$18K)	45,900	46,818
5820	Consultants - Non Instructional - Custom 1	3,500	-		-	-
5824	District Oversight Fees	31,557	38,761	1.0% of LCFF General Purpose Grant	48,923	60,387
5833	Fines and Penalties	61	-		-	-
5836	Fingerprinting	1,396	2,665	\$61 per FTE	3,054	3,482
5839	Fundraising Expenses	14,781	15,076		15,378	15,685
5843	Interest - Loans Less than 1 Year	480	-		-	-
5845	Legal Fees	70,000	52,800	\$4400 per Monthly Rate	53,856	54,933
5851	Marketing and Student Recruiting	2,054	2,091	\$26 per New Student	2,757	3,051
5857	Payroll Fees	4,080	4,162	\$347 per Monthly Rate	4,245	4,330
5860	Printing and Reproduction	185	189		193	196
5861	Prior Yr Exp (not accrued)	9,261	-		-	-
5863	Professional Development	49,622	25,913		26,431	26,960
5866	SPED MH Day/NPS Services	256,010	380,000	1 out of state NPS, 1 in-state NPS, Seneca	387,600	395,352
5869	Special Education Contract Instructors	100,000	121,962		150,721	182,862
5872	Special Education Encroachment	10,206	9,987		10,187	10,390
5875	Staff Recruiting	8,533	4,402		4,490	4,580
5878	Student Assessment	1,918	2,000	AP, CELDT	2,040	2,081
5881	Student Information System	20,103	30,000	PowerSchool/Alma?	30,600	31,212
5884	Substitutes	41,042	15,030	\$30 per Student	18,574	22,535
5887	Technology Services	36,800	37,536		38,287	39,052
5899	Miscellaneous Operating Expenses	18,900	-		50,738	-
5900	Communications	16,755	18,360	\$1530 per Monthly Rate	18,727	19,102
5905	Communications - Cell Phones	120	122		125	127
5915	Postage and Delivery	1,500	1,530		1,561	1,592
	<b>SUBTOTAL - Services &amp; Other Operating Exp.</b>	<b>1,411,728</b>	<b>1,554,613</b>		<b>1,783,191</b>	<b>1,898,991</b>

**East Bay Innovation Academy**

Multiyear Budget Summary DRAFT

		2016/17	2017/18	2017/18	2018/19	2019/20
		Current Forecast	Preliminary Budget	Notes	Preliminary Budget	Preliminary Budget
<b>6000</b>	<b>Capital Outlay</b>					
6100	Sites & Improvement of Sites	-	-	-	-	-
6200	Buildings & Improvement of Buildings	-	-	-	-	-
6300	School Libraries	-	-	-	-	-
6400	Equipment	-	-	-	-	-
6410	Computers (capitalizable items)	-	-	-	-	-
6420	Furniture (capitalizable items)	-	-	-	-	-
6430	Other Equipment (capitalizable items)	-	-	-	-	-
6500	Equipment Replacement	-	-	-	-	-
0000	(School Defined)	-	-	-	-	-
0000	(School Defined)	-	-	-	-	-
	<b>SUBTOTAL - Capital Outlay</b>	-	-	-	-	-
	<b>TOTAL EXPENSES</b>	<b>4,680,603</b>	<b>5,252,077</b>	-	<b>6,176,649</b>	<b>7,164,226</b>
<b>6900</b>	<b>Total Depreciation (includes Prior Years)</b>	-	-	-	-	-
	<b>TOTAL EXPENSES including Depreciation</b>	<b>4,680,603</b>	<b>5,252,077</b>	-	<b>6,176,649</b>	<b>7,164,226</b>

# Cover Sheet

## Review and vote on Consent Agenda

**Section:** VII. Governance  
**Item:** A. Review and vote on Consent Agenda  
**Purpose:** Vote

**Submitted by:**

**Related Material:**

June 2017 - 2017-2018 CharterSAFE Renewal Letter to the Membership (1).pdf  
June 2017 - 2017-2018 CharterSAFE Renewal Letter to the Membership.pdf  
June 2017 - April EBIA - 2016-17 YTD Check Register AND Credit Card Register - pr 060817.pdf  
June 2017 - EBIA 17-18 Education Protection Account spending determination.pdf  
June 2017 - EBIA EPA 17-18 resolution.doc  
June 2017 - EBIA Expansion Project TIA Contract Signed (Traffic Study).pdf  
June 2017 - EBIA-SOW#4-Limited Back Office Service-sc-06.06.pdf  
June 2017 - EBIA\_CARS spring 2017 submission 2017.06.07.pdf  
June 2017 - East Bay Innovation Academy-Homeless Education Policy-06.12.2017.pdf  
June 2017 - East Bay Innovation Academy.10867.CharterSAFEProposal1718.05-30-2017.pdf  
June 2017 - May EBIA - 2016-17 YTD Check AND credit card Register - pr 060817 (1).pdf

# charterSAFE

May 30, 2017

Dear CharterSAFE Member:

Thank you for your continued membership in the CharterSAFE insurance and risk management program. As we are closing the 2016-2017 policy year and beginning to enroll members for the 2017-2018 policy year, we have enclosed your renewal proposal. Material changes to the program are summarized below. In conjunction with the proposal, we have also attached a separate organization status report for your review.

Within the national scholastic sector, the insurance industry has suffered adverse losses in many capacities including workers' compensation, sexual abuse liability, concussion injuries, and employment practices (wrongful hiring/firing). This downturn has been more acute in California, and insurance companies are passing these increases onto to their school clients. Historically, CharterSAFE's risk management team's efforts to be proactive in risk management and loss control has enabled CharterSAFE to maintain stable rates in spite of market fluctuations. Unfortunately, this is not to say that our charter school members are immune from these hazards; in fact, there has been exponential increase to claims for the charter schools in the past few years, and it has further deteriorated this year.

Our response to this increasingly difficult insurance market condition is to creatively meet this challenge with innovation in all components of the program to mitigate some financial burden for our members.

For the 2017-2018 policy year, we have increased two deductibles to reduce premiums. Deductibles serve as an incentive for all of our members to be proactive in managing school risks. Our goal is to reduce the impact of losses on the program as a whole, and in turn, to each individual member. The increased deductibles are as follows:

- Directors & Officers Liability deductible will increase from \$2,500 to \$5,000 per claim.
- IEP Defense Cost deductible, which has varied this year between \$5,000 and \$7,500 depending on school size will be \$7,500 per occurrence for all members.

Using member feedback and additional risks and exposures we have seen in the past year, CharterSAFE has improved on our insurance program coverages as follows:

- Added Volunteer Accident to the Student Accident Policy – limits of \$25,000 per volunteer accident. The \$500 deductible per accident applies for school sponsored high-risk activities (the same as it currently applies to student accidents).
- Added Terrorism Property coverage – limits of \$20,000,000 per occurrence and aggregate for all CharterSAFE members combined. The deductible is \$1,000 per occurrence.

# charterSAFE

- Added Pollution/Environmental coverage – limits of \$1,000,000 per occurrence and \$5,000,000 aggregate for all CharterSAFE members combined. The deductible is \$10,000 per occurrence.

After revising the above deductibles and adding improvements to the program, we were able to successfully cap rate increases for the 2017-2018 pool-wide property and liability rates to an average of 7% and 4% for workers' compensation rates (before adjusting for individual member loss experience).

This upcoming year, in an effort to maintain stable rates, you will see more risk management incentives from CharterSAFE as we work to keep our member schools safe and reduce losses. We will be introducing an inaugural risk management and loss control grant program. This program will aim to incentivize our members to proactively manage risks. Examples of the goals of the grant program include sexual abuse prevention training, increasing risk management and human resources knowledge, implementing a return-to-work program, and improving cyber safety.

We look forward to working with you through the 2017-2018 policy period, and as always, we welcome your feedback on any of our services and/or our insurance program. If you have any questions or concerns, please do not hesitate to contact us.

Best regards,

The CharterSAFE Team

# charterSAFE

May 30, 2017

Dear CharterSAFE Member:

Thank you for your continued membership in the CharterSAFE insurance and risk management program. As we are closing the 2016-2017 policy year and beginning to enroll members for the 2017-2018 policy year, we have enclosed your renewal proposal. Material changes to the program are summarized below. In conjunction with the proposal, we have also attached a separate organization status report for your review.

Within the national scholastic sector, the insurance industry has suffered adverse losses in many capacities including workers' compensation, sexual abuse liability, concussion injuries, and employment practices (wrongful hiring/firing). This downturn has been more acute in California, and insurance companies are passing these increases onto to their school clients. Historically, CharterSAFE's risk management team's efforts to be proactive in risk management and loss control has enabled CharterSAFE to maintain stable rates in spite of market fluctuations. Unfortunately, this is not to say that our charter school members are immune from these hazards; in fact, there has been exponential increase to claims for the charter schools in the past few years, and it has further deteriorated this year.

Our response to this increasingly difficult insurance market condition is to creatively meet this challenge with innovation in all components of the program to mitigate some financial burden for our members.

For the 2017-2018 policy year, we have increased two deductibles to reduce premiums. Deductibles serve as an incentive for all of our members to be proactive in managing school risks. Our goal is to reduce the impact of losses on the program as a whole, and in turn, to each individual member. The increased deductibles are as follows:

- Directors & Officers Liability deductible will increase from \$2,500 to \$5,000 per claim.
- IEP Defense Cost deductible, which has varied this year between \$5,000 and \$7,500 depending on school size will be \$7,500 per occurrence for all members.

Using member feedback and additional risks and exposures we have seen in the past year, CharterSAFE has improved on our insurance program coverages as follows:

- Added Volunteer Accident to the Student Accident Policy – limits of \$25,000 per volunteer accident. The \$500 deductible per accident applies for school sponsored high-risk activities (the same as it currently applies to student accidents).
- Added Terrorism Property coverage – limits of \$20,000,000 per occurrence and aggregate for all CharterSAFE members combined. The deductible is \$10,000 per occurrence.

# charterSAFE

- Added Pollution/Environmental coverage – limits of \$1,000,000 per occurrence and \$5,000,000 aggregate for all CharterSAFE members combined. The deductible is \$1,000 per occurrence.

After revising the above deductibles and adding improvements to the program, we were able to successfully cap rate increases for the 2017-2018 pool-wide property and liability rates to an average of 7% and 4% for workers' compensation rates (before adjusting for individual member loss experience).

This upcoming year, in an effort to maintain stable rates, you will see more risk management incentives from CharterSAFE as we work to keep our member schools safe and reduce losses. We will be introducing an inaugural risk management and loss control grant program. This program will aim to incentivize our members to proactively manage risks. Examples of the goals of the grant program include sexual abuse prevention training, increasing risk management and human resources knowledge, implementing a return-to-work program, and improving cyber safety.

We look forward to working with you through the 2017-2018 policy period, and as always, we welcome your feedback on any of our services and/or our insurance program. If you have any questions or concerns, please do not hesitate to contact us.

Best regards,

The CharterSAFE Team

## EBIA, Check Register

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## Check Register



EBIA  
April 2017

Grand Total 116,363.46

Vendor	Check Number	Voided	Date	Description	Check Amount
Wells Fargo	DB040317		4/3/2017	DB040317; Online Transfer- CC Acct: 9609	4,200.00
Acer	4580		4/4/2017	PO# PO# 0324173; NX.SHEAA.004 - Repair	479.96
Alhambra	4581		4/4/2017	Acct#631790914021372; Water Svc: 03/01, 03/15 & 03/20/17	194.96
Alhambra	4582		4/4/2017	Acct: 631790916125678; Water Srvc: March 2017	20.95
Alliance Redwoods Conference Grounds	4583		4/4/2017	Contract# 11683; Deposit For June Intersession	2,000.00
Kelly Atkinson	4584		4/4/2017	Reimb: Posters, Paper & Glue Sticks	110.46
Grace M. Bassel	4585		4/4/2017	Reimb: Live Scan	57.00
Christy White Associates	4586		4/4/2017	2015-16 Tax Services	1,150.00
Laura Lira	4587		4/4/2017	Reimb: Mileage	355.78
Seneca Family of Agencies	4588		4/4/2017	Svc: Mental Health - 01/01 - 01/31/17	6,975.00
Tuolumne Trails	4589		4/4/2017	Deposit for Reservation - June Intersession	1,801.31
Vision Service Plan - (CA)	4590		4/4/2017	Acct# 30 050552 0001; Insurance Premium: April 2017	376.18
WeVideo Inc.	4591		4/4/2017	EDU K12 - 6 MO Subscription Through 06/30/17	499.00
Michael Zacharia	4592		4/4/2017	Bookkeeping Svc: 03/01 - 03/31/17	1,168.75
Ca Charter School JPA	DB040417		4/4/2017	DB040417; Ca Charter School JPA	4,899.00
Alameda County Office of Education	4593		4/11/2017	Cust# 000210; STRS Processing Fee: 3rd Qtr (Jan - Mar) FY 2016-17	354.00
American Logistics Company, LLC	4594		4/11/2017	Client# 1551; Special Ed Transportation: March 2017	2,795.00
AT&T	4595		4/11/2017	Acct# 072 085 5436 436; Internet Server	485.73
Change Academy Lake of the Ozarks	4596		4/11/2017	Academic/Therapeutic/Room & Board/Medication Mgmt	15,998.62
Christy White Associates	4597		4/11/2017	2015-16 Charter School Audit	688.50
Comcast	4598		4/11/2017	Acct: 8155 40 039 4380214; High-Speed Internet Svc	115.73
Kaiser Foundation Health Plan	4599		4/11/2017	CustID: 000709549-0000; Billing# 681343504; Insurance Premium: May 2017	18,265.05
Law Offices of Young, Minney & Corr, LLP	4600		4/11/2017	Professional Svcs through 03/31/17	5,021.35
Marlin Business Bank	4601		4/11/2017	Acct# 1480401; Contract# 401-1480401-001/002; Contract Payment: Cres Cor Cook n Hold Oven & Insurance Fee	543.17
Replica Digital Ink	4602		4/11/2017	Upper & Lower School Overview	155.18
Afifa Sayeed	4603		4/11/2017	Reimb: Beverages for auction party	2,058.12

Note: Multiple expenses or "Itemized/Invoice Amounts" may be paid by one check. The total "Check Amount" will appear for each "Itemized/Invoice Amount" paid by the check.

Payroll checks are not included on this register.

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**EBIA, Check Register**

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Vendor	Check Number	Voided	Date	Description	Check Amount
Sergio's Janitorial & Yard Services	4604		4/11/2017	School Cleaning: 03/06 - 03/31/17	4,800.00
The Phillips Academy	4605		4/11/2017	Tution, Counselling & Guidance Therapy: March 2017	5,282.00
Total Registration	4606		4/11/2017	AP Exam Service	250.00
BambooHR	DB041817		4/18/2017	DB041817; HR Tracking Software - Monthly Subscription	193.50
Teach Speech	4607		4/20/2017	Teach Speech Hours: March 2017	3,483.38
Comcast	4608		4/20/2017	Account: 930911022; Ethernet Srvc	4,027.41
Copower	4609		4/20/2017	ID#902360; Premium: May 2017	2,078.92
Edtec	4610		4/20/2017	Monthly Services: April 2017	10,864.46
Great American Insurance Goup	4611		4/20/2017	403b Insurance: Employee Annuities	150.00
Infinisource Benefit Services	4612		4/20/2017	COBRA Notices Service: 04/01/17 - 03/31/18	500.00
Maxim Staffing Solutions	4613		4/20/2017	Acct: 46627-0132; Hearing & Vision Screening: 03/24/17	190.76
Office Depot	4614		4/20/2017	Acct# 16610744; Office Supplies	820.97
Revolution Foods, Inc.	4615		4/20/2017	Cust# C001339; Food Service: March 2017	7,177.64
Starline Supply Company	4616		4/20/2017	Cust# 0001249; Janitorial Supplies	1,712.77
Waste Management Of Alameda County	4617		4/20/2017	Cust# 00513-38904; Waste Svc: March 2017	302.02
Waste Management Of Alamaeda County	4618		4/20/2017	Cust# 14897-08907; Waste Svc: March 2017	561.67
Bloomerang	DB042517		4/25/2017	DB042517; Bloomerang	297.00
PG&E	DB042617		4/26/2017	DB042617; PG&E	2,902.16

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Credit Card

EBIA  
April 2017



Grand Total 6,200.42

Credit Card	Vendor	Date	Description	Transaction Amount
9515-2030	Fiverr	5/23/2017	04/26 - Fiverr	6.00
9515-2030	Amazon Mktplace Pmts	5/23/2017	04/26 - Amazon Mktplace Pmts	244.37
9515-2030	Amazon Mktplace Pmts	5/23/2017	04/26 - Amazon Mktplace Pmts	168.25
9515-2030	Amazon Mktplace Pmts	5/23/2017	04/26 - Amazon Mktplace Pmts	390.72
9515-2030	Amazon.com	5/23/2017	04/27 - Amazon.com	10.91
9515-2030	Fiverr	5/23/2017	04/30 - Fiverr	6.00
9515-2030	Amazon Mktplace Pmts	5/23/2017	04/30 - Amazon Mktplace Pmts	124.75
9515-2030	Indeed	5/23/2017	05/01 - Indeed	37.16
9515-2030	paypal *Escape Kits	5/23/2017	05/03 - paypal *Escape Kits	19.99
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/04 - AMAZON MKTPLACE PMTS	151.60
9515-2030	Amazon.com	5/23/2017	05/04 - Amazon.com	34.81
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/04 - AMAZON MKTPLACE PMTS	35.53
9515-2030	Amazon.com	5/23/2017	05/04 - Amazon.com	17.47
9515-2030	Girl Scouts of San	5/23/2017	05/05 - Girl Scouts of San	1,016.00
9515-2030	Adobe *Creative Cloud	5/23/2017	05/05 - Adobe *Creative Cloud	19.99
9515-2030	RingCentral, Inc	5/23/2017	05/06 - RingCentral, Inc	610.36
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/06 - Amazon Mktplace Pmts	32.99
9515-2030	Catsone.com	5/23/2017	05/08 - Catsone.com	247.50
9515-2030	Fiverr	5/23/2017	05/08 - Fiverr	6.00
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/08 - AMAZON MKTPLACE PMTS	20.23
9515-2030	Dropbox	5/23/2017	05/08 - Dropbox	9.99
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/09 - Amazon Mktplace Pmts	65.59
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/09 - Amazon Mktplace Pmts	94.68
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/10 - AMAZON MKTPLACE PMTS	118.01
9515-2030	Amazon.com	5/23/2017	05/11 - Amazon.com	471.60
9515-2030	Amazon.com	5/23/2017	05/11 - Amazon.com	17.47
9515-2030	Amazon.com	5/23/2017	05/11 - Amazon.com	207.39
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/11 - Amazon Mktplace Pmts	71.35
9515-2030	Codebender INC	5/23/2017	05/14 - Codebender INC	20.00
9515-2030	APL*Apple Online Store	5/23/2017	05/16 - APL*Apple Online Store	10.00
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/16 - Amazon Mktplace Pmts	88.88
9515-2030	San Joaquin County Office of Education	5/23/2017	05/19 - San Joaquin County Office of Education	750.00

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## EBIA

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Credit Card	Vendor	Date	Description	Transaction Amount
9515-2030	Dropbox	5/23/2017	05/19 - Dropbox	99.00
9515-2030	Amazon.com	5/23/2017	05/21 - Amazon.com	8.73
9515-2030	Fiverr	5/23/2017	05/22 - Fiverr	6.00
9515-2022	Sq*Red Tomatoes	5/23/2017	04/29 - Livescan Vendor - Location fee	287.00
9515-2022	Bay Area Jump	5/23/2017	04/29 - Springfest	239.00
9515-2022	Adobe *Acrobat Std	5/23/2017	05/15 - Adobe *Acrobat Std	155.88
9515-2022	American Refrigeration	5/23/2017	05/19 - Fridge repair at Roosevelt	240.00
9515-2022	Wells Fargo VISA CC (2022)	5/23/2017	05/23 - Wells Fargo VISA CC (2022) - Late Charge	25.00
9515-2022	Wells Fargo VISA CC (2022)	5/23/2017	05/23 - Wells Fargo VISA CC (2022) - Finance Charge	14.22

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Payroll checks are not included on this register.

**East Bay Innovation Academy**  
**Education Protection Account Expenditure Summary**  
**Fiscal Year 2017-18**  
**General Fund, Resource 1400**

Description	Function	Amount
<b>EXPENDITURES AND OTHER FINANCING USES</b>		
(Objects 1000-7999)		
Instruction	1000-1999	95,112.00
Instruction-Related Services		
Instructional Library, Media, and Technology	2420	0.00
Other Instructional Resources	2490-2495	0.00
Pupil Services		
Guidance and Counseling Services	3110	0.00
Psychological Services	3120	0.00
Attendance and Social Work Services	3130	0.00
Health Services	3140	0.00
Speech Pathology and Audiology Services	3150	0.00
Pupil Testing Services	3160	0.00
Pupil Transportation	3600	0.00
Food Services	3700	0.00
Other Pupil Services	3900	0.00
Ancillary Services	4000-4999	0.00
Community Services	5000-5999	0.00
Enterprise	6000-6999	0.00
Plant Services	8000-8999	0.00
Other Outgo	9000-9999	0.00
County Office of Education Only		
County Services to Districts (without regard to Function) (Goal 8600)	various	0.00
<b>TOTAL EXPENDITURES AND OTHER FINANCING USES</b>		<b>95,112.00</b>
<b>AMOUNT AVAILABLE FOR THIS FISCAL YEAR</b>		
Adjusted Beginning Fund Balance (Objects 9791-9795)		0.00
Revenue Limit Sources (Object 8012)		95,112.00
<b>TOTAL AVAILABLE</b>		<b>95,112.00</b>
<b>BALANCE (Total Available minus Expenditures &amp; Other Financing Uses)</b>		<b>0.00</b>

\*Estimated EPA Spending based on estimated 17-18 ADA.  
 Actual amount and expenses may be different than stated. Per Proposition 30,  
 EPA funds may not be used for salaries or benefits of administrators or any  
 other administrative costs.

**RESOLUTION REGARDING THE EDUCATION PROTECTION ACCOUNT**

WHEREAS, the voters approved Proposition 30 on November 6, 2012;

WHEREAS, Proposition 30 added Article XIII, Section 36 to the California Constitution effective November 7, 2012;

WHEREAS, the provisions of Article XIII, Section 36(e) create in the state General Fund an Education Protection Account to receive and disburse the revenues derived from the incremental increases in taxes imposed by Article XIII, Section 36(f);

WHEREAS, before June 30<sup>th</sup> of each year, the Director of Finance shall estimate the total amount of additional revenues, less refunds that will be derived from the incremental increases in tax rates made pursuant to Article XIII, Section 36(f) that will be available for transfer into the Education Protection Account during the next fiscal year;

WHEREAS, if the sum determined by the State Controller is positive, the State Controller shall transfer the amount calculated into the Education Protection Account within ten days preceding the end of the fiscal year;

WHEREAS, all monies in the Education Protection Account are hereby continuously appropriated for the support of school districts, county offices of education, charter schools and community college districts;

WHEREAS, monies deposited in the Education Protection Account shall not be used to pay any costs incurred by the Legislature, the Governor or any agency of state government;

WHEREAS, a community college district, county office of education, school district, or charter school shall have the sole authority to determine how the monies received from the Education Protection Account are spent in the school or schools within its jurisdiction;

WHEREAS, the governing board of the district or charter school shall make the spending determinations with respect to monies received from the Education Protection Account in open session of a public meeting of the governing board;

WHEREAS, the monies received from the Education Protection Account shall not be used for salaries or benefits for administrators or any other administrative cost;

WHEREAS, each community college district, county office of education, school district and charter school shall annually publish on its Internet website an accounting of how much money was received from the Education Protection Account and how that money was spent;

WHEREAS, the annual independent financial and compliance audit required of community college districts, county offices of education, school districts and charter schools shall

ascertain and verify whether the funds provided from the Education Protection Account have been properly disbursed and expended as required by Article XIII, Section 36 of the California Constitution;

WHEREAS, expenses incurred by community college districts, county offices of education, school districts and charter schools to comply with the additional audit requirements of Article XIII, Section 36 may be paid with funding from the Education Protection Act and shall not be considered administrative costs for purposes of Article XIII, Section 36.

NOW, THEREFORE, IT IS HEREBY RESOLVED:

1. The monies received from the Education Protection Account shall be spent as required by Article XIII, Section 36 and the spending determinations on how the money will be spent shall be made in open session of a public meeting of the governing board of East Bay Innovation Academy;

2. In compliance with Article XIII, Section 36(e), with the California Constitution, the governing board of East Bay Innovation Academy has determined to spend the monies received from the Education Protection Act as attached.

DATED: June 12, 2017.

	Aye	Nay	Abstain	Absent
Rochelle Benning				
Ken Berrick				
Gary Borden				
Kate Doyle				
Kelly Garcia				
Julia Gitis				
Laurie Jacobson Jones				
Tom Pryor				
Totals:				

\_\_\_\_\_  
Rochelle Benning, Board Chair

ATTEST:

\_\_\_\_\_  
[[ ]], Board Secretary

**Scope of Work for a**  
Transportation Impact Analysis  
**for the proposed**  
**Proposed Expansion of the**  
**East Bay Innovation Academy**  
in  
**The City of Oakland**

**June 9, 2017**

**Scope of Work**

The following is the proposed scope of work for traffic engineering consulting services for the proposed expansion of the East Bay Innovation Academy which is currently operating at the site of the previous Marshall Elementary School. This project would involve an increase in the population at the existing K-8 charter school from approximately 450 students to 850 students. The school is located at 3400 Malcolm Avenue (at Hellman Street) in the City of Oakland.

**Task #1 - Preparation of the Draft Trip Generation, Project Trip Distribution Estimates, and the Preliminary Scope of Work for the TIA** – Abrams Associates would develop preliminary trip generation estimates for the project and also finalize the assumptions for the distribution of project traffic. Once we have your approval for these calculations they would be forwarded to District staff with our proposed list of study intersections along with the data supporting the assumptions and also graphics showing the potential increase in traffic at intersections in the area. With this information the District would have what they need to formally approve the underlying assumptions before we proceed with preparation of the draft report. Please note the proposal for the remainder of the traffic analysis included below provides our best estimate of what will be needed, but we won't know for sure until the District formally signs off on the trip generation assumptions and the proposed scope of work.

***Task #1 Estimated Budget - \$1,500***

**Task #2 - Transportation Impact Analysis** – Abrams Associates will provide a transportation impact analysis for the proposed project and will assist in the preparation of the environmental documentation in the area of transportation. Once the various analyses are completed a detailed report would be prepared and submitted to you in an

administrative draft form for internal review.

The report will follow all applicable requirements and procedures set forth by CEQA, Alameda County, Caltrans, and the City of Oakland. The following is a list of the specific tasks that are proposed:

- 1) The report will clearly define all assumptions for trip generation, trip distribution, timing of transportation improvements and street network changes. This task would include detailed analysis of the proposed project access points during AM and PM peak hours.
- 2) Based on our preliminary estimates of the project trip generation and distribution approximately four key intersections will need to be included in this analysis. This would also include a review of internal intersections and any other minor driveways or unsignalized intersections that might be impacted by the project.

Below is a preliminary list of study intersections that were developed based on our initial estimates of the project's trip distribution. Please note we will conduct a field visit to each study intersection to observe intersection lane configurations, vehicle storage lengths, existing traffic control, speed limits, lane utilization, adjacent land uses, and any other necessary features.

The preliminary list of study intersections is as follows:

1. Foothill Boulevard at Talbot Avenue/Stanley Avenue
  2. Foothill Boulevard at 106<sup>th</sup> Avenue
  3. 106<sup>th</sup> Avenue at Peralta Oaks Drive /I-580 On-Ramp
  4. Malcolm Avenue at the EBIA Entrance/Hellman Street
- 3) The study will include evaluation of the operations at each of the study intersections and segments for four different scenarios:
    1. Existing Conditions
    2. Existing Plus Project Conditions
    3. Cumulative Conditions (Based on the Countywide Traffic Model)
    4. Cumulative Plus Project Conditions
  - 4) The physical characteristics of the area and the surrounding roadway network will be reviewed to identify existing roadway cross-sections, intersection lane configurations, traffic control devices, and surrounding land uses. All planned or programmed roadway changes will be documented.
  - 5) The traffic study will include detailed calculations of the project trip generation, traffic distribution and assignment for the project.
  - 6) The analysis will include a review of transit access and potential impacts to bus service in the area.



- 7) The analysis will include a review of access and internal circulation, the need for traffic signals, parking requirements, and bicycle/pedestrian safety.
- 8) Appropriate mitigation measures will be presented for any significant impacts identified. In addition, a list of any other potential transportation improvement measures will be prepared to further improve traffic operations and access to the area wherever possible.
- 9) Summary figures will be prepared illustrating the existing roadway network, project study intersections and all traffic volumes used in the analysis. All appropriate field data, traffic calculations and reference tables will be provided in the report appendices as required.
- 10) An administrative draft of the traffic impact study would be submitted for internal review. The draft report would be finalized following the response to all comments that are received from the District staff and their consultants.

**Task #2 Estimated Budget - \$11,000**

**Project Schedule and Budget** - Abrams Associates can begin work on this project immediately, and would work with you to meet the proposed schedule for the project. The budget for this work will be based on the actual hours and costs involved, using the billing rates for Abrams Associates staff shown on the attached fee schedule. Based on this preliminary scope we would request a budget not to exceed \$12,500. This budget includes \$1,500 for preparation of the trip generation/trip distribution forecasts, the scoping memorandum, and finalizing the scope of work. It also includes \$11,000 for data collection and preparation of the transportation impact analysis itself as well as additional coordination with your team and the District.

It should be noted that it is possible this project could require additional time beyond what has been assumed for the purposes of this proposal, which only includes a 10% contingency. If the project ends up receiving substantial additional requests for analysis, requires response to an unusually large amount of comments, or attendance/presentations at meetings is required then a contract extension may be required if there is not sufficient budget remaining at that point. However, unless an extension is formally authorized the total amount of this agreement (\$12,500) would not be exceeded without your consent and approval.

ABRAMS ASSOCIATES

By Stephen Abrams

Its President

Date 6/9/2017

EAST BAY INNOVATION ACADEMY

By Laure Jones  
Its Co-Founder + Board Treasurer

Date 6/12/17

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***Effective July 1, 2016***

This fee schedule indicates the billing rates for Abrams staff services for project related expenses. All invoices are due and payable within 30 days of the date of invoice.

**Billing Rates**

<u>Category</u>	<u>Hourly Billing Rate</u>
Principal	\$230.00
Senior Traffic Engineer	\$170.00
Traffic Engineer	\$155.00
Transportation Planner	\$135.00
Graphics/Drafting	\$88.00
Technical/Clerical	\$54.00

The above hourly rates include all salary, fringe benefits, overhead and profit.

**Project Expenses**

Project expenses include out-of-pocket, project-related costs such as transportation, subsistence, reproduction, postage, telephone, computer charges and subcontractor services. Project expenses will be billed at cost plus 10% service and handling charges.

**Effective Dates**

These billing rates supersede all prior billing rates. Billing rates will be subject to revision July 1, 2017.

**Service Charges**

Invoices outstanding over 30 days will be assessed a 2% service charge for each 30 days beyond the initial payment period.

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Abrams Associates Traffic Engineering  
Employer ID # 94-3388442

STATEMENT OF WORK #4  
by and between  
EdTec Inc. and East Bay Innovation Academy

<b>Reference:</b>	Master Services Agreement dated April 22, 2013, by and between EdTec Inc. ("EdTec") and East Bay Innovation Academy ("Client").
<b>Term:</b>	July 1, 2017 through June 30, 2018 (the "Term"). This Statement of Work shall automatically renew for consecutive additional one (1) year terms unless either party provides written notice of non-renewal to the other at least one hundred twenty (120) days prior to the expiration of the then-current term (each, a "Renewal Term"). The Term and any Renewal Term(s) are referred to as the Term.
<b>Scope of Services:</b>	<p><b>1. ACCOUNTING</b></p> <p>Financial Statements and Accounting:</p> <ul style="list-style-type: none"> <li>• <b>Monthly financial statements</b> – EdTec will close the books and reconcile accounts the accounts monthly, on or before the 15<sup>th</sup> of the succeeding month.</li> <li>• <b>Setup of school's chart of accounts and general ledger</b> – EdTec sets up and maintains the school's chart of accounts, based on EdTec's standard structure which is designed to be compliant with SACS.</li> <li>• <b>Customized account codes</b> – EdTec maintains limited customized account codes for unique features of the school program. These must be established at the beginning of the fiscal year to avoid re-coding of historic transactions.</li> <li>• <b>Fund accounting</b> – EdTec can track revenue and expenditures by fund, e.g. implementation grant funds and expenses or Title I expenditures.</li> <li>• <b>Training</b> – EdTec trains appropriate personnel on accounting procedures and practices designed to ensure accurate record keeping.</li> <li>• <b>Transaction recording</b> – EdTec records in detail all transactions in a computerized accounting system.</li> <li>• <b>Journal entries and account maintenance</b> – EdTec prepares and records journal entries and maintains the general ledger according to accepted accounting standards.</li> <li>• <b>Bank reconciliation</b> – EdTec reconciles primary bank and investment accounts to general ledger monthly or upon receipt of statements. Revolving and petty cash accounts are reconciled quarterly or as required.</li> <li>• <b>Account for Capital Outlay Expenses</b> – EdTec records capitalized assets as provided by the school. On an annual basis, EdTec records related depreciation and amortization in the general ledger and reconciles expenditures to fixed asset listing.</li> </ul>

	<p><b>Accounts Payable:</b></p> <ul style="list-style-type: none"> <li>• EdTec processes all invoices and, pending approval from the school leader or surrogate, pays the bills and codes them, based on school input, in the financial software, typically on a two-week schedule with limited rush payments as needed. EdTec checks to make sure there are no double payments or double billings on multiple invoices. EdTec troubleshoots payment issues with vendors. EdTec also verifies that funds are available to pay the bill.</li> </ul> <p><b>Audit:</b></p> <ul style="list-style-type: none"> <li>• <b>Audit support</b> – EdTec prepares financial documents for the auditors to help ensure a smooth and timely audit process. For clarification, the school is responsible to pay auditor fees. The school shall also provide all non-financial records required by the audit – e.g. attendance records, employee records, teacher certifications.</li> <li>• <b>Single Audit Act of 1984</b> – EdTec provides support in school compliance with accounting related audit requirements, including the Single Audit Act of 1984.</li> <li>• <b>Auditor group purchasing</b> – EdTec receives a volume discount on audits that it passes on to its clients who choose to work with this auditor.</li> <li>• <b>IRS Form 990 Support (and the corresponding State form, if applicable)</b> – EdTec supports the school and auditor in preparing Form 990 tax-exempt organization annual filing. (For clarification, fees for audit and 990 are paid by school and it is the school’s and auditor’s sole responsibility to ensure these forms are filed).</li> <li>• The school is responsible for attendance and audit of employee work.</li> </ul> <p><b>2. PAYROLL</b></p> <p>EdTec uses an external payroll processor to accomplish the following tasks. EdTec interfaces between the school and payroll processor, and performs quality checking so that the school does not need to interact with the payroll processor. The school pays payroll processing fees.</p> <ul style="list-style-type: none"> <li>• <b>Payroll Processing</b> – EdTec calculates and processes payroll and payroll-related payments/deductions for salaried and hourly employees based on information submitted by authorized Client representatives (excluding vacation and/or sick time tracking). EdTec generates checks for signature by authorized Client representatives (or through electronic signature) or facilitates Direct Deposit at the Client’s request. The fees set forth below include semi-monthly payroll processing.</li> <li>• <b>Payroll reporting</b> – EdTec prepares and files all required payroll reports for submission to federal and state agencies and submits electronic payroll, payroll tax reports and payroll tax deposits to the appropriate authorities for a single EDD/tax ID number. For multiple reporting numbers, an additional fee will apply.</li> <li>• <b>Payroll record maintenance</b> – EdTec keeps track of employee payroll information. Client maintains employee files (based on EdTec-provided template files).</li> </ul>
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	<ul style="list-style-type: none"> <li>• <b>W-2 and 1099 processing</b> – EdTec prepares and sends Forms W-2 and 1099 to employees and government, provided that this SOW remains in effect at the end of the applicable calendar year, and subject to the timely receipt of accurate and complete information and data from Client, in accordance with EdTec policies, throughout the Term and including for any portion of the applicable calendar year that preceded the provision of Services under this SOW.</li> <li>• <b>IRS, SDI, WC support</b> – EdTec assists in resolving payroll tax issues before the IRS and other federal and state reporting agencies. EdTec also assists school with any State Disability, Workers Comp, or Unemployment Insurance claims by providing supporting payroll reports.</li> <li>• <b>STRS/PERS and other retirement plan administration</b> – EdTec will help the school set up STRS/PERS accounts, and makes appropriate deductions and payments to the county for STRS and/or PERS based on information provided by the school. Note that in some cases it can take approximately 12 months to set up such contributions because of district/county delays. Also, some counties charge separately for this mandated service. The school is responsible for STRS/PERS account set-up, administration and enrollments and any fees from outside parties including late fees and interest levied by STRS/PERS.</li> </ul> <p><b>3. COMPLIANCE and ACCOUNTABILITY</b></p> <ul style="list-style-type: none"> <li>• Note that compliance and accountability are the responsibility of the school. EdTec will provide advice on some matters directly related to the scope of services under this SOW, but this information is not comprehensive. In addition, since rules, regulations and interpretations regularly change, schools should seek independent verification from their attorneys or other sources.</li> <li>• On an hourly basis, EdTec can provide assistance on LEA Plans and School Wide Plans.</li> </ul> <p><b>4. ATTENDANCE and STUDENT INFORMATION SYSTEMS</b></p> <ul style="list-style-type: none"> <li>• <b>Internal attendance reporting</b> – EdTec will assist with monthly attendance reports based on school-provided data as outlined in the addendum to this Statement of Work. Resolution of data discrepancies is charged at the hourly rate.</li> <li>• <b>Government attendance reporting</b> – Using school-provided data, and at the school’s request, EdTec prepares and/or performs a quality assurance check of government attendance reports, including the 20-day report, P-1, P-2, and P-Annual. (Note: Does not include SARC, CBEDS, CALPADS or other demographic reports). EdTec will provide up to 4 hours to train Client on CALPADS procedures and report generation. CALPADS support beyond the initial 4 hours is available on an hourly billable or project billable basis.</li> <li>• <b>Attendance procedures assistance</b> – EdTec will provide up to 4 hours of assistance reviewing schools’ attendance accounting procedures and</li> </ul>
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	<p>advising on areas for improvement, although the school is ultimately responsible for keeping accurate attendance and ADA compliance.</p> <ul style="list-style-type: none"> <li>• <b>Student Information System (SIS) procurement and support</b> – EdTec will provide up to 3 hours of assistance to the school leader in evaluating the school’s need for an SIS. If the school asks EdTec to access, use or troubleshoot an SIS not supported by EdTec, hourly charges will apply for EdTec to learn and use the SIS. (Note the school is responsible for taking accurate attendance, on a system provided by the school, at the school’s expense.)</li> <li>• School requests for EdTec assistance on items not listed in this section shall be billed hourly.</li> </ul> <p><b>5. CHARTER DEVELOPMENT and GRANTS</b></p> <ul style="list-style-type: none"> <li>• <b>Fund accounting</b> – EdTec sets up fund accounting to allow the school to track direct and allocated costs to grants.</li> <li>• <b>Grant writing</b> – On a separate fee basis, EdTec can do grant prospect analysis and write grants.</li> <li>• <b>Charter renewal</b> – On a separate fee basis, EdTec will prepare and advocate a charter petition for school renewal.</li> </ul>
<p><b>Excluded Services:</b></p>	<p>Other than the services outlined above, EdTec is not responsible for any other activities, unless mutually agreed to in writing. Examples of Excluded Services include, but are not limited to, outside legal costs, computer installation and support, purchasing of small items or of curriculum materials, printing and graphic arts, grant-writing or fundraising, hiring and associated legal requirements (e.g., background checks, credential reviews) and recordkeeping, meetings with outside parties (e.g., the Board or District), Special Ed administration, testing, assessment, compliance with NCLB, compliance with government grant requirements, audits, attendance accounting, and other outside professional services costs.</p>
<p><b>Compensation:</b></p>	<ul style="list-style-type: none"> <li>• <b>Back Office Services:</b> EdTec will provide these services at a fixed fee per school fiscal year as follows:             <ul style="list-style-type: none"> <li>○ \$84,000 for the Term</li> </ul> <p>These fixed fees <u>include</u> all normal postage, telephone, copying, faxing, etc., <u>except</u> for bank and payroll fees that will be passed through. The annual fees are payable monthly commencing on July 1, 2017.</p> <ul style="list-style-type: none"> <li>○ The fees above are for the scope of services contained herein solely for those school(s) for which Client holds a granted charter or that have been in operation prior to the date of this SOW.</li> <li>○ In addition to the fees as provided above, there will be an incremental fee for the following, if applicable:                 <ul style="list-style-type: none"> <li>▪ Benefit accrual tracking such as vacation and sick time.</li> </ul> </li> </ul> </li> <li>• <b>Consulting:</b> Should you desire additional services not in the above scope, we would be pleased to provide these, subject to staff availability, at the then-current discounted hourly fee schedule for back-office clients (travel time is billed at ½ of the applicable hourly rate). Typical additional services that are not in the above scope are business, budgeting and reporting</li> </ul>

	<p>consulting, grant writing, charter writing and the implementation of computer systems or computerized Student Information Systems. Again, this rate includes normal phone, copying and incidental costs. Additional costs would include mileage reimbursement for travel, overnight delivery charges, and pre-approved out-of-pocket expenses.</p> <ul style="list-style-type: none"> <li>• <b>Fee Increases:</b> EdTec reserves the right to increase the fees payable under this Statement of Work by up to 5% upon the conclusion of the Term and each Renewal Term. EdTec will provide written notice of a fee increase at least thirty (30) days prior to the expiration of the Term or then-current Renewal Term, as applicable.</li> <li>• <b>Payment Terms:</b> All fees payable to EdTec must be received by EdTec within thirty (30) days of the date of invoice. EdTec reserves the right to suspend the provision of Services in the event an invoice is thirty days past due.</li> </ul>
<p><b>School Obligations:</b></p>	<p>EdTec’s services will assist with the operations of Client’s back-office operations, but do not include auditing Client’s provided information and operations for completeness and compliance. It is Client’s responsibility to adopt and adhere to reasonable policies and procedures, and to ensure the school remains in compliance with all applicable rules and regulations and maintains sound fiscal operations. In order to fulfill the scope of services described herein, EdTec relies on Client to provide timely, accurate and complete information, and to cooperate reasonably with EdTec. Furthermore, Client must immediately inform EdTec of any material change that could affect EdTec’s ability to complete its responsibilities and to assist Client in complying with all applicable laws and regulations.</p> <p>Client will comply with the attached Roles and Responsibilities document (Attachment 1).</p>
<p><b>Termination:</b></p>	<p>Either party may, upon giving thirty (30) days’ written notice identifying specifically the basis for such notice, terminate this Statement of Work for breach of a material term or condition of this Statement of Work, unless the party receiving the notice cures such breach within the thirty (30) day period. In addition, EdTec may terminate this Statement of Work immediately upon written notification and without liability, (a) if Client, in EdTec’s reasonable judgment, violates any of the “School Obligations” above, (b) if Client does not open by September 30, 2017, or (c) upon any revocation of Client’s charter. Upon any early termination under this section, Client shall pay EdTec for all services rendered by EdTec prior to the effective date of termination. In addition, if EdTec terminates this Statement of Work under this section, Client shall also pay EdTec for any demobilization or other costs resulting from such early termination.</p>

Statement of Work #4 by and between  
EdTec Inc. and East Bay Innovation Academy  
Page 6 of 9, June 6, 2017

EDTEC INC.	EAST BAY INNOVATION ACADEMY
By: _____	Signature: _____
Name: Steve Campo	Name: _____
Title: President & CEO	Title: _____
Date: _____	Date: _____
1410A 62 <sup>nd</sup> Street Emeryville, CA 94608	Address: _____
Fax: 510.663.3503	_____
	Email: _____
	Phone: _____
	Fax: _____



## ATTACHMENT 1

### Roles and Responsibilities

Clarity on roles and responsibilities between EdTec and East Bay Innovation Academy (“Client”) will help ensure high quality, timely business services. Table 1 below outlines the roles and responsibilities of both parties:

Table 1: Roles & Responsibilities

	EdTec	Client
<b>Payroll</b>	<ul style="list-style-type: none"> <li>• Accurate, complete payroll on a semi-monthly basis</li> <li>• Published calendar of payroll deadlines</li> <li>• Reminders for payroll deadlines</li> <li>• Final payroll information sent to client for approval by at least one working day prior to client’s payroll approval date</li> <li>• Advice on setting up STRS/PERS</li> <li>• Primer on health insurance terminations, COBRA, and employee vs. contractor classifications</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Timecards and Changes:</b> Submission to EdTec of timecards for new hires and other payroll changes by payroll calendar deadlines and using EdTec forms/processes</li> <li>• <b>Payroll Approval:</b> Approval (email or fax) to EdTec by payroll calendar deadlines</li> <li>• <b>New Hires:</b> Timely submission to EdTec of new hire paperwork on EdTec new hire forms</li> <li>• Enrolling (or working with a broker to enroll) staff in any STRS, PERS, 403b, health plans, and other insurance/retirement/contribution/deduction programs</li> <li>• Terminating staff from health plans, other insurance, and other applicable contribution/deduction programs.</li> </ul>
<b>Accounts Payable</b>	<ul style="list-style-type: none"> <li>• Timely and accurate check payments</li> <li>• Payment of invoices according to client’s approval policies</li> <li>• Recordkeeping/processes adhering to generally accepted accounting standards for accuracy and security and approved by independent auditors</li> <li>• Payment systems linked to financial statements</li> <li>• Bank account reconciliations</li> <li>• Invoice/payment research</li> <li>• Advising clients on outstanding checks to ensure adequate cash availability</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Submission of Payment and Deposit Information</b> <ul style="list-style-type: none"> <li>○ Weekly submission to EdTec of invoices, reimbursement requests, deposits, and other expenditures using EdTec forms and processes</li> <li>○ Coding all expenses and non-state funding deposits using EdTec forms and processes and codes from the most recent budget.</li> </ul> </li> <li>• <b>Banking:</b> Monitoring and maintaining adequate bank account balances to meet expense obligations</li> </ul>

<p><b>Attendance and SIS</b></p>	<ul style="list-style-type: none"> <li>• Provide School Questionnaire form to Client</li> <li>• Provide District/Authorizer Questionnaire form to Client.</li> <li>• Evaluation of SIS systems (up to 3 hours in first year of operations)</li> <li>• Generation of complete, accurate attendance reports (based on school provided data) by the deadline</li> <li>• <b>Monthly, 20-Day and P-Reports:</b> Basic quality assurance and troubleshooting (up to 1.5 hours per report)</li> <li>• <b>Class Size Reduction Report:</b> Report preparation and submission (for up to 4 hours) for K-3 schools only</li> <li>• <b>CALPADS / CSIS Reports:</b> EdTec will provide up to 4 hours to train Client on CALPADS procedures and report generation. CALPADS support beyond the initial 4 hours is available on an hourly billable or project billable basis.</li> <li>• <b>Training:</b> Conduct Attendance Primer training before the start of the school year to educate Client staff on basic attendance processes</li> </ul>	<ul style="list-style-type: none"> <li>• Accurate and complete collection of attendance data in compliance with State rules</li> <li>• Completion of School Questionnaire form</li> <li>• Completion of District/Authorizer Questionnaire form</li> <li>• <b>Monthly Reports:</b> Submission of data to EdTec at least 3 business days before the deadline</li> <li>• <b>P-Reports:</b> Submission of data to EdTec at least 5 business days before the deadline</li> <li>• Clients without student information system software will submit student data to EdTec using EdTec forms</li> <li>• Training: Key Client staff to attend start of year Attendance Primer training; EdTec will not be able to complete the Attendance / Data deliverables until the training is completed</li> </ul>
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The payroll, accounts payable, and attendance deadlines / calendars referenced above shall be provided separately.

**1. LATE FEES and PROCESSING CHARGES**

Payroll:

- **Timecards and Payroll Changes:** A late fee of \$100 will be imposed for each business day timecards for hourly staff and payroll changes are submitted late to EdTec based on the published Payroll Calendar. The latest Timecards and Changes can be accepted is one business day prior to Payroll Approval deadlines.
- EdTec will generate and distribute manual checks, as needed and without charge, for employee terminations and payroll corrections due to EdTec error. For all other manual check requests, EdTec will charge a fee of \$35 plus overnight delivery charges (if overnight delivery is requested).

Accounts Payable:

- **Weekly Submittal:** Client must submit a weekly package conforming to EdTec forms and processes. The submittal shall contain invoices with appropriate coding, reimbursement requests, deposits, and/or other payment documents to EdTec using EdTec forms. If Client fails to submit this weekly package or fails to submit all

necessary invoices and receipts to process payment, Client will be charged an additional processing fee of \$35.

- As a courtesy, EdTec may waive the first two occurrences (i.e. up to \$70) of the Weekly Submittal processing fee.

Attendance:

- **Evaluation of SIS systems:** EdTec fees include up to 3 hours in first year of school's operations to assist Client with the evaluation of SIS systems.
- **Monthly, 20-Day and P-Reports:** EdTec fees include 1.5 hours of quality assurance and troubleshooting when processing and generating each report. Any EdTec work beyond this hour (including data correction and reconciliation with other periods) will be charged at the discounted data service rate.
- **Expedite Fee:** If Client misses an EdTec deadline for providing data and subsequently requests assistance in generating reports on an expedited basis, a \$100 expedite fee per occurrence may apply.
- **Class Size Reduction Report for K-3 schools:** EdTec fees include up to four hours of time for report preparation and submission.
- **CALPADS / CSIS Reports:** EdTec fees include up to four hours for training on report assistance and generation. CALPADS support beyond the initial 4 hours is available on an hourly billable or project billable basis.
- EdTec can provide additional assistance for reports at the discounted data service rate.
- If Client requires EdTec assistance for work with external deadlines (e.g. P-Reports), EdTec may set a deadline for receiving the request, data, and/or other materials from the Client to ensure timely and accurate processing. EdTec may charge an expedite fee for requests, data, and/or other materials not received from the client by the EdTec deadline.
- If Client does not have a student information software system, Client will use EdTec forms when submitting information to EdTec. Failure to use EdTec forms will result in a processing fee of \$100.
- As a courtesy, EdTec may waive the first occurrence of the forms processing fee.

[end]

East Bay Innovation Academy (01 61259 0129932)

Status: Certified  
 Saved by: Laurie Jones  
 Date: 6/7/2017 9:35 AM

**2017-18 Certification of Assurances**

Submission of Certification of Assurances is required every fiscal year. A complete list of legal and program assurances for the fiscal year can be found at <http://www.cde.ca.gov/fg/aa/co/ca17asstoc.asp>.

**CDE Program Contact:**

Joy Paull, [jpaull@cde.ca.gov](mailto:jpaull@cde.ca.gov), 916-319-0297

**Consolidated Application Certification Statement**

I hereby certify that all of the applicable state and federal rules and regulations will be observed by this applicant; that to the best of my knowledge the information contained in this application is correct and complete; and I agree to have the use of these funds reviewed and/or audited according to the standards and criteria set forth in the California Department of Education's Categorical Program Monitoring (CPM) Manual. Legal assurances for all programs are accepted as the basic legal condition for the operation of selected projects and programs and copies of assurances are retained on site. I certify that we accept all assurances except for those for which a waiver has been obtained or requested. A copy of all waivers or requests is on file. I certify that actual ink signatures for this form is on file.

Authorized Representative's Full Name	Laurie Jacobson Jones
Authorized Representative's Signature	
Authorized Representative's Title	Founding board member
Authorized Representative Signature Date	06/12/2017

**\*\*\*Warning\*\*\***

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

### 2017-18 Protected Prayer Certification

ESSA Section 8524 specifies federal requirements regarding constitutionally protected prayer in public elementary and secondary schools. This form meets the annual requirement and provides written certification.

**CDE Program Contact:**

Franco Rozic, Title I Monitoring and Support Office, [frozic@cde.ca.gov](mailto:frozic@cde.ca.gov), 916-319-0269  
 Mindi Yates, Title I Policy and Program Guidance Office, [myates@cde.ca.gov](mailto:myates@cde.ca.gov), 916-319-0789

### Protected Prayer Certification Statement

The LEA hereby assures and certifies to the California State Board of Education that the LEA has no policy that prevents, or otherwise denies participation in, constitutionally protected prayer in public schools as set forth in the "Guidance on Constitutionally Protected Prayer in Public Elementary and Secondary Schools."

The LEA hereby assures that this page has been printed and contains an ink signature. The ink signature copy shall be made available to the California Department of Education upon request or as part of an audit, a compliance review, or a complaint investigation.

The authorized representative agrees to the above statement	Yes
Authorized Representative's Full Name	Laurie Jacobson Jones
Authorized Representative Title	Founding board member
Authorized Representative Signature Date	06/12/2017
Comment	
If the LEA is not able to certify at this time an explanation must be provided in the Comment field. (Maximum 500 characters)	

**\*\*\*Warning\*\*\***

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## 2017-18 Application for Funding

**CDE Program Contact:**

Education Data Office, [ConApp@cde.ca.gov](mailto:ConApp@cde.ca.gov), 916-319-0297

### Local Governing Board Approval

The LEA is required to review and receive approval of their Application for Funding selections with their local governing board.

Date of approval by local governing board	06/12/2017
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### District English Learner Advisory Committee (DELAC) Review

Per Title 5 of the California Code of Regulations Section 11308, if your district has more than 50 English learners the district must establish a District English Learner Advisory Committee (DELAC) and involve them in the application for funding for programs that serve English learners.

DELAC representative's full name	
DELAC review date	
Meeting minutes web address <small>Please enter the Web address of DELAC review meeting minutes (format <a href="http://SomeWebsiteName.xxx">http://SomeWebsiteName.xxx</a>). If a Web address is not available, the LEA must keep the minutes on file which indicates that the application is approved by the committee.</small>	
DELAC comment  <small>If an advisory committee refused to review the application, or if DELAC review is not applicable, enter a comment. (Maximum 500 characters)</small>	DELAC is not applicable since LEA is an independent charter school. The LEA has its own local governing board.

### Application for Categorical Programs

To receive specific categorical funds for a school year the LEA must apply for the fund by selecting Yes. Only the categorical funds the LEA is eligible to receive are displayed.

<b>Title I Part A (Basic Grant)</b> ESSA Sec. 1111 et seq. SACS 3010	Yes
<b>Title II Part A (Supporting Effective Instruction)</b> ESEA Sec. 2104 SACS 4035	Yes
<b>Title III Part A Immigrant</b> ESEA Sec. 3102 SACS 4201	No
<b>Title III Part A English Learner</b>	No

**\*\*\*Warning\*\*\***

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## 2017-18 Application for Funding

**CDE Program Contact:**

Education Data Office, [ConApp@cde.ca.gov](mailto:ConApp@cde.ca.gov), 916-319-0297

ESEA Sec. 3102 SACS 4203	
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**\*\*\*Warning\*\*\***

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### 2017-18 Substitute System for Time Accounting

This certification may be used by auditors and by CDE oversight personnel when conducting audits and sub-recipient monitoring of the substitute time-and-effort system. Approval is automatically granted when the LEA submits and certifies this data collection.

**CDE Program Contact:**

Julie Brucklacher, Financial Accountability and Info Srv Office, [jbruckla@cde.ca.gov](mailto:jbruckla@cde.ca.gov), 916-327-0858

The LEA certifies that only eligible employees will participate in the substitute system and that the system used to document employee work schedules includes sufficient controls to ensure that the schedules are accurate. Additional information on the predetermined schedule substitute system of time accounting can be found at <http://www.cde.ca.gov/fg/ac/co/timeaccounting2013.asp>. Detailed information on documenting salaries and wages, including both substitute systems of time accounting, are described in Procedure 905 of the California School Accounting Manual posted on the Web at <http://www.cde.ca.gov/fg/ac/sa/>.

2017-18 Request for authorization	No
LEA certifies that the following is a full disclosure of any known deficiencies with the substitute system or known challenges with implementing the system (Maximum 500 characters)	

**\*\*\*Warning\*\*\***

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.





## **East Bay Innovation Academy Homeless Education Policy**

East Bay Innovation Academy has designated Lansine Toure as the liaison for homeless children and youths. He may be reached at [ltoure@eastbayia.org](mailto:ltoure@eastbayia.org) or (510) 577-9557.

East Bay Innovation Academy agrees to implement the following policy ensure that all children and youth who are homeless receive a free appropriate public education and are given opportunity to succeed in school, consistent with the McKinney-Vento Homeless Assistance Act and requirements of submitting the Consolidated Application for accessing federal categorical funding.

East Bay Innovation Academy will ensure that children and youth who are homeless are free from discrimination, segregation, and harassment.

Information regarding this policy, including the educational rights of children and youth identified as homeless will be distributed to all students upon enrollment and once during the school year, provided to students who seek to withdraw from East Bay Innovation Academy, as well as other places where children, youth, and families who are homeless receive services, including family and youth shelters, motels, campgrounds, welfare departments, health departments, and other social service agencies. This policy is also available at ([www.eastbayia.org](http://www.eastbayia.org))

### **Definitions**

Children and youth experiencing homelessness means children and youth who are otherwise legally entitled to or eligible for a free public education and who lack a fixed, regular, and adequate nighttime residence, including:

- Children and youth who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in motels, hotels, campgrounds, or trailer parks due to a lack of alternative adequate accommodations; are living in emergency or transitional shelters; are abandoned in hospitals; or are awaiting placement in foster care.
- Children and youth who have a primary nighttime residence that is a private or public place not designed for or ordinarily used as a regular sleeping accommodation for human beings.
- Children and youth who are living in a car, park, public space, abandoned building, substandard housing, bus or train station, or similar setting.
- Migratory children and youth who are living in a situation described above.



A child or youth will be considered to be homeless for as long as he or she is in a living situation described above.

*Unaccompanied youth* means a youth not in the physical custody of a parent or guardian, who meets the definition of homeless as defined above. The more general term youth also includes unaccompanied youth.

*Enroll* and *enrollment* means attending school and participating fully in all school activities.

*Immediate* means without delay.

*Parent* means a person having legal or physical custody of a child or youth.

*Local liaison* is the staff person designated by East Bay Innovation Academy as the person responsible for carrying out the duties assigned to the local homeless education liaison by the McKinney-Vento Homeless Assistance Act.

### **Identification**

Children and youth who qualify as homeless in East Bay Innovation Academy will be identified. Data will be collected on the number of children and youth experiencing homelessness in East Bay Innovation Academy; where they are living; their academic achievement (including state and local assessments); and the reasons for any enrollment delays or interruptions in their education.

### **School Selection**

Each child and youth enrolled at East Bay Innovation Academy identified as homeless has the right to remain enrolled. Services that are required to be provided, including transportation to and from the East Bay Innovation Academy and services under federal and other programs, will not be considered in determining feasibility.

### **Enrollment**

Enrollment may not be denied or delayed due to the lack of any document normally required for enrollment, including:

- Proof of residency
- Transcripts/school records ((East Bay Innovation Academy must contact the student's previous school to obtain school records. Initial placement of students whose records are not immediately available can be made based on the student's age and information gathered from the student, parent, and previous schools or teachers.)
- Immunizations or immunization/health/medical/physical records (If necessary, the school must refer students to the local liaison to assist with obtaining immunizations and/or immunization and other medical records.)
- Proof of guardianship



- Birth certificate
- Unpaid school fees
- Lack of clothing that conforms to dress code
- Any factor related to the student's living situation

Unaccompanied youth must be enrolled immediately in school. They may either enroll themselves or be enrolled by a parent, non-parent caretaker, older sibling, or local liaison.

### **Transportation**

If transportation is offered at East Bay Innovation Academy, parents and unaccompanied youth will be informed of their right to transportation before they are enrolled. At a parent's or unaccompanied youth's request, said transportation if offered will be provided for the entire time the child or youth attends East Bay Innovation Academy, including during pending disputes.

### **Services**

Children and youth experiencing homelessness will be provided services comparable to services offered to other students in East Bay Innovation Academy, including:

- Transportation
- Title I, Part A services - Children and youth identified as homeless are automatically eligible for Title I, Part A services
- Educational services for which the student meets eligibility criteria, including special education and related services and programs for English language learners
- Vocational and technical education programs
- Gifted and talented programs
- Before- and after-school programs
- Free meals - On the day a child or youth identified as homeless enrolls in school, East Bay Innovation Academy must submit the student's name to its food service program coordinator for immediate eligibility.

When applying any standing policy regarding tardiness or absences, any tardiness or absence related to a child or youth's living situation will be excused.

### **Disputes**

If a dispute arises over any issue covered in this policy, the child or youth experiencing homelessness will be admitted immediately to East Bay Innovation Academy pending final resolution of the dispute. The student will also have the rights of a student who is homeless to all appropriate educational services, transportation, free meals, and Title I, Part A, services while the dispute is pending.

East Bay Innovation Academy will provide the parent or unaccompanied youth with a written explanation of its decision and the right to appeal and will refer the parent or youth to the local liaison immediately. The local liaison will ensure that the student is enrolled at East Bay Innovation Academy and is receiving other services to which he or she is entitled and will resolve the dispute as expeditiously as possible.



The parent or unaccompanied youth will be given every opportunity to participate meaningfully in the resolution of the dispute. The local liaison will keep records of all disputes in order to determine whether particular issues or schools are repeatedly delaying or denying the enrollment of children and youth identified as homeless. The parent, unaccompanied youth, or school district may appeal the East Bay Innovation Academy's decision as provided in East Bay Innovation Academy's formal dispute resolution process.

### **Training**

The local liaison will conduct training regarding Title X requirements and sensitivity/awareness activities for all staff of East Bay Innovation Academy.

### **Coordination**

The local liaison will coordinate with and seek support from the local district and county coordinator for the Education of Homeless Children and Youth, public and private service providers in the community, housing and placement agencies, local liaisons in neighboring districts, and other organizations and agencies. Coordination will include conducting outreach and training through those agencies. Both public and private agencies will be encouraged to support the local liaison and East Bay Innovation Academy in implementing this policy.



## **East Bay Innovation Academy**

### **Insurance Proposal**

**Coverage Effective: July 1, 2017 at 12:01 AM -  
July 1, 2018 at 12:01 AM**

California Charter Schools Joint Powers Authority  
P.O. Box 969, Weimar, CA 95736  
Phone: (888) 901-0004 Fax: (530) 236-9569  
Web Site: <http://www.chartersafe.org>

**Disclosure:**

*This proposal is an outline of the coverages proposed by California Charter Schools Joint Powers Authority (CCSJPA), based on the information provided by the Named Member. It does not include all of the terms, coverages, exclusions, limitations and conditions of the actual contract language. The policies themselves must be read for those details. Policy forms for your reference will be made available upon the school's request to the California Charter Schools JPA. As set forth in this document, CCSJPA DBA CharterSAFE shall be referred to as CharterSAFE.*

# INTRODUCTION

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Dear Devin,

CharterSAFE is pleased to present your renewal proposal for the 2017-2018 policy year. Please review this document, which includes:

- 2017-2018 Premium Summary
- Exposures
- Schedule of Locations
- Board and Employment Liability
- General Liability
- Auto Liability & Physical Damage
- Excess Liability
- Property
- Pollution Liability & Property
- Crime
- Terrorism Liability
- Terrorism Property
- Student & Volunteer Accident Liability
- Cyber Liability
- Worker's Compensation & Employer's Liability
- Claims Reporting Instructions

As a CharterSAFE member, you will receive all of our complimentary member services for the 2017-2018 policy period. Member services include access to online staff training, human resources advice, risk management and loss control guidance, site safety evaluations, and contract review of insurance and indemnity provisions. Please contact a CharterSAFE representative for more information.

All of CharterSAFE's coverage placements are with insurance companies that have a financial rating A.M. Best of A- VII or higher.

## **Required Signatures:**

To bind coverage, you must sign and complete the following:

1. The proposal acceptance at the end of the Premium Summary Page
2. Cyber Application, if not yet completed

Please return the signed document to your CharterSAFE representative (Northern and Central California: [jrubin@chartersafe.org](mailto:jrubin@chartersafe.org) / Southern California: [ramezcua@chartersafe.org](mailto:ramezcua@chartersafe.org) or fax to (530) 236-9569).

Thank you,

The CharterSAFE Team

# PREMIUM SUMMARY

## East Bay Innovation Academy

### Premium Summary 2017-2018

This proposal includes the following coverages:

**Package** **Premium: \$29,723.00**

- Board and Employment Liability
- General Liability
  - Educator's Legal Liability (Educator's E&O)
  - Employee Benefits Liability
  - Sexual Abuse Liability
- Auto Liability & Physical Damage
- Excess Liability
- Property
- Pollution Liability & Property
- Crime
- Terrorism Liability
- Terrorism Property
- Student & Volunteer Accident Liability
- Cyber Liability

**Worker's Compensation & Employer's Liability** **Premium: \$31,941.00**

**Total Premium** **Premium: \$61,664.00**

- Choose One Payment Option**
- Payment in Full (\$61,664.00)**
  - Installment Plan:**
    - **Deposit (25%) - Due Now (\$15,416.00)**
    - **9 Monthly Installments (\$5,139.00)**

*Thank you for participating in CharterSAFE ACH program. Simply indicate which ACH option above you wish to use for payment.*

***Invoices shall become delinquent thirty (30) calendar days from installment due date. Coverage is subject to cancellation for any invoice over ninety (90) days past due.***

### Proposal Acceptance:

*By signing below, I, representing the named member in this proposal, acknowledge that I have read the complete proposal and agree to the terms outlined within.*

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

**Disclosure:**

*This proposal is an outline of the coverages proposed by California Charter Schools Joint Powers Authority, based on the information provided by the Named Member. It does not include all of the terms, coverages, exclusions, limitation and conditions of the actual contract language. The policies themselves must be read for those details. Policy forms for your reference will be made available upon the school's request to the California Charter Schools JPA.*

## EXPOSURES

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The premiums are calculated based on the following exposures on schedule:

No. Students	450
<hr/>	
No. Employees	38
<hr/>	
Annual Payroll	\$2,688,095.00
<hr/>	
No. Vehicles	0

### **Continuity and Retroactive Dates:**

<b>Directors &amp; Officers Liability Continuity Date:</b>	04/11/2014
<b>Employment Practices Liability Continuity Date:</b>	04/11/2014
<b>Fiduciary Liability Continuity Date:</b>	04/11/2014



# SCHEDULE OF LOCATIONS

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Each of the addresses listed below are covered for all lines of coverage presented in this proposal:

*Policyholder mailing address*                      10867

3400 Malcolm Avenue  
Oakland, CA 94606

<b>ID</b>	<b>Location</b>	<b>Building Value</b>	<b>Content Value</b>	<b>EDP Value</b>	<b>Total TIV</b>
15923	East Bay Innovation Academy: 1926 East 19th Street 1926 East 19th Street Oakland, CA 94606	\$0.00	\$10,000.00	\$50,000.00	\$60,000.00
11530	East Bay Innovation Academy: 3400 Malcolm Avenue 3400 Malcolm Avenue Oakland, CA 94605	\$0.00	\$375,000.00	\$375,000.00	\$750,000.00
<b>Total:</b>		\$0.00	\$385,000.00	\$425,000.00	\$810,000.00

# BOARD AND EMPLOYMENT LIABILITY

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**COVERAGE IS ON A CLAIMS MADE BASIS**

<b><u>Layer 1 Coverages*</u></b>	<b><u>Layer 1 Limits</u></b>	<b><u>Layer 1 Deductibles</u></b>
<b>Directors and Officers and Company Liability</b>	\$1,000,000 per <b>claim</b> and member aggregate	\$5,000 per <b>claim</b>
<b>Employment Practices Liability</b>	\$1,000,000 per <b>claim</b> and member aggregate	\$7,500 per <b>claim</b>
<b>Fiduciary Liability</b>	\$1,000,000 per <b>claim</b> and member aggregate	\$0

\*Please refer to the Board and Employment Liability Declarations Page for complete details.

<b><u>Layer 2 Coverages:</u></b>	<b><u>Layer 2 Limits:</u></b>	<b><u>Layer 2 Deductibles:</u></b>
<b>Directors and Officers and Company Liability &amp; Employment Practices Liability</b>	\$1,000,000 per <b>claim</b> and member aggregate	None, follow form Layer 1 Coverage

**Reporting:** Must be reported to CharterSAFE within 60 days after policy expiration. Coverage is provided on a claims-made basis.

# GENERAL LIABILITY

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<b><u>Layer 1 Coverages*:</u></b>	<b><u>Layer 1 Limits:</u></b>	<b><u>Layer 1 Deductibles:</u></b>
<b>Bodily Injury, Property Damage</b>	\$2,000,000 per occurrence	\$500 per occurrence for bodily injury arising out of participation in a school sponsored <i>High Risk Activity</i> **
<b>Medical Payments</b>	\$10,000 per person \$50,000 per occurrence	\$0
<b>Educator's Legal Liability</b>	\$2,000,000 per occurrence	\$2,500 per occurrence (except for IEP Defense)
<b>IEP Defense Sublimit</b>	\$50,000 per occurrence and per member aggregate	\$7,500 per occurrence
<b>Employee Benefits Liability</b>	\$2,000,000 per occurrence	\$0
<b>Law Enforcement Liability</b>	\$2,000,000 per occurrence	\$0
<b>Sexual Abuse Liability</b>	\$2,000,000 per occurrence	\$0
<b>Products and Completed Operations</b>	\$2,000,000 per occurrence	\$0

\*Layer 1 Limits do not have aggregates (except for IEP Defense Sublimit)

\*\*A list of *High Risk Activities* is available at [www.chartersafe.org](http://www.chartersafe.org) or you may contact Carly Weston ([cweston@chartersafe.org](mailto:cweston@chartersafe.org)/818-709-1570) of CharterSAFE's Risk Management team.

# AUTO LIABILITY & PHYSICAL DAMAGE

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<b><u>Layer 1 Coverages*:</u></b>	<b><u>Layer 1 Limits:</u></b>	<b><u>Layer 1 Deductibles:</u></b>
<b>Owned Auto Liability, if scheduled with CharterSAFE:</b>	\$2,000,000 per occurrence	\$0
<b>Non-Owned Auto Liability:</b>	\$2,000,000 per occurrence	\$0
<b>Hired Auto Liability:</b>	\$2,000,000 per occurrence	\$0
<b>Auto Physical Damage**:</b>	\$1,000,000 per occurrence	\$500 per occurrence for Hired Auto Physical Damage

\*Layer 1 Coverages do not have aggregates.

\*\* Auto Physical Damage described herein for hired automobiles is secondary to any/all rental coverage offered by the rental company(ies). CharterSAFE strongly advises our members to purchase auto physical damage when renting vehicles.

## EXCESS LIABILITY - CharterSAFE Option

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**Coverage:**

**Excess over underlying:**

General Liability  
Auto Liability  
Sexual Abuse Liability  
Educator's Legal Liability  
Employee Benefits Liability  
Law Enforcement Liability  
Directors and Officers Liability  
Employment Practices Liability

**Limits:**

\$28,000,000 per occurrence/claim  
\$28,000,000 per member aggregate

**Optional Excess Limits:**

Optional excess liability limits above \$30,000,000 is available. If interested, please contact:

Arthur J. Gallagher & Co. Insurance Brokers of California, Inc  
18201 Von Karman Avenue, Suite #200  
Irvine, CA 92612

**Audra Powers**  
Account Executive  
Audra\_Powers@ajg.com  
949-349-9840

# PROPERTY

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**Perils Include:** Direct Physical Loss subject to all the terms, conditions, and exclusions established in the applicable policy(ies)

**Valuation:** Replacement Cost as scheduled with CharterSAFE, see "Schedule of Locations" page above

<u>Coverages</u>	<u>Limits</u>	<u>Deductibles</u>
<b>Property</b>	\$150,000,000 per occurrence OR Total Insured Value as scheduled with CharterSAFE, whichever is lower. Please see "Schedule of Locations" page above for scheduled limits	\$1,000 per occurrence
<b>Boiler &amp; Machinery/ Equipment Breakdown</b>	\$150,000,000 per occurrence OR Total Insured Value as scheduled with CharterSAFE, whichever is lower. Please see "Schedule of Locations" page above for scheduled limits	\$1,000 per occurrence
<b>Business Interruption</b>	\$10,000,000 per occurrence	\$1,000 per occurrence
<b>Extra Expense</b>	\$5,000,000 per occurrence	\$1,000 per occurrence

**Please note:**  
 - If you have a renovation/construction project valued over \$200,000 in hard and soft costs, please contact Thuy Wong ([twong@chartersafe.org](mailto:twong@chartersafe.org)/949-476-5031). CharterSAFE is able to endorse builder's risk coverage for renovation projects up to \$10,000,000 onto your policy. Additional premium would apply.  
 - If you are interested in a separate policy for flood and/or earthquake coverage, please contact Thuy Wong ([twong@chartersafe.org](mailto:twong@chartersafe.org)/949-476-5031).

# POLLUTION LIABILITY & PROPERTY

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**COVERAGE IS ON A CLAIMS MADE BASIS**

<u>Coverages</u>	<u>Limits</u>	<u>Deductibles</u>
<b>Pollution Liability &amp; Property</b>	\$1,000,000 per pollution condition or indoor environmental condition  \$5,000,000 CharterSAFE Members' Combined Annual Aggregate	\$10,000 per occurrence
<b>Reporting:</b>	Must be reported to CharterSAFE within 60 days after policy expiration. Coverage is on a claims-made basis.	

# CRIME

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<u>Coverages</u>	<u>Limits</u>	<u>Deductibles</u>
<b>Monies and Securities:</b>	\$1,000,000 per occurrence	\$500 per occurrence
<b>Computer &amp; Funds Transfer Fraud:</b>	\$1,000,000 per occurrence	\$500 per occurrence
<b>Forgery or Alteration:</b>	\$1,000,000 per occurrence	\$500 per occurrence
<b>Employee Dishonesty:</b>	\$1,000,000 per occurrence	\$500 per occurrence

# TERRORISM LIABILITY

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**COVERAGE IS ON A CLAIMS MADE BASIS**

<u>Coverages</u>	<u>Limits</u>	<u>Deductibles</u>
<b>Terrorism Liability:</b>	\$5,000,000 per occurrence	\$0
	\$5,000,000 CharterSAFE Members' Combined Annual Aggregate	\$0
 <b>Reporting:</b>	Must be reported to CharterSAFE within 60 days after policy expiration. Coverage is provided on a claims-made basis.	

# TERRORISM PROPERTY

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<u>Coverages</u>	<u>Limits</u>	<u>Deductibles</u>
<b>Terrorism Property:</b>	\$20,000,000 per occurrence OR Total Insured Value as scheduled with CharterSAFE, whichever is lower. Please see "Schedule of Locations" page above for scheduled limits	\$1,000 per occurrence
	\$20,000,000 CharterSAFE Members' Combined Annual Aggregate	\$1,000 per occurrence



# STUDENT & VOLUNTEER ACCIDENT

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**Coverages**

**Limits**

**Deductibles**

**Student Accident:**

\$50,000 per injury/accident  
104 Week benefit period

\$500 per injury/accident for school sponsored *High Risk Activities*\*

**Volunteer Accident:**

\$25,000 per injury/accident

\$500 per injury/accident for school sponsored *High Risk Activities*\*

\*A list of *High Risk Activities* is available at [www.chartersafe.org](http://www.chartersafe.org) or you may contact Carly Weston ([cweston@chartersafe.org](mailto:cweston@chartersafe.org) / 818-709-1570) of CharterSAFE's Risk Management team.

**Terms & Conditions:**

- Coverage is provided on an Excess Basis, but would become primary should the student or volunteer not have health insurance
- Claim submission deadline: 90 days after the Covered Accident.

**Optional Catastrophic Student Accident Coverage:**

If interested in obtaining higher limits with or without sports included, please contact:

Arthur J. Gallagher & Co. Insurance Brokers of California, Inc.  
18201 Von Karman Avenue, Suite #200  
Irvine, CA 92612

**Audra Powers**  
Account Executive  
[Audra\\_Powers@ajg.com](mailto:Audra_Powers@ajg.com)  
949-349-9840

# CYBER LIABILITY

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## COVERAGE IS ON A CLAIMS MADE BASIS

<u>Coverages</u>	<u>Limits</u>	<u>Deductibles</u>
<b>Cyber Liability:</b>	\$1,000,000 per occurrence  \$5,000,000 CharterSAFE Members' Combined Annual Aggregate	\$2,500 per occurrence
<b>Coverage Includes:</b>	<ul style="list-style-type: none"><li>● Privacy Notification Costs</li><li>● Regulatory Fines and Claim Expenses for Privacy Liability</li><li>● Extortion Damages for Extortion Threat</li><li>● Crisis Management Expenses</li><li>● Business Interruption</li></ul>	
<b>Reporting:</b>	Claims must be reported within 60 days after policy expiration. Coverage is on a claims-made basis.	
<b>Requirement for Coverage to be in effect:</b>	Completed cyber application.	

# WORKER'S COMPENSATION & EMPLOYER'S LIABILITY

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<u>Coverages</u>	<u>Limits</u>	<u>Deductibles</u>
<b>Worker's Compensation:</b>	Statutory	\$0
<b>Employer's Liability for Bodily Injury:</b>	\$5,000,000 per Accident	\$0
	\$5,000,000 by Disease Per Employee	\$0
	\$5,000,000 by Disease Policy Limit	\$0

**Auditable:**

**The estimated payroll figure will be audited at the end of each coverage period. The CCS JPA will request copies of the 941 Federal Quarterly Reporting Forms on a quarterly basis to verify the payroll figure. If the estimated payroll figure has been overestimated, a refund will be issued. If the estimated payroll figure has been underestimated, an invoice for the additional amount due will be issued.**

# CharterSAFE

Policy Year: 7/1/2017 - 7/1/2018

Forms and instructions available at [www.chartersafe.org](http://www.chartersafe.org)

## Claims Reporting Quick Reference Guide

Sue Bedard, ARM-P  
Senior Risk & Claims Manager  
Phone: 818.394.6544  
sbedard@chartersafe.org

Carly Weston, MPA  
Risk & Claims Manager  
Phone: 818.394.6547  
cweston@chartersafe.org

Susan Diamanti, WCCP  
Workers' Compensation Manager  
Phone: 818.394.6549  
sdiamanti@chartersafe.org

EMPLOYEE INJURY	STUDENT INJURY	PROPERTY/ LIABILITY CLAIM
<p><b>What to do if an employee injury or illness requiring professional medical treatment occurs.</b></p> <ol style="list-style-type: none"> <li>If the injury requires emergency medical treatment, call 911 and transport or request an ambulance. For emergency care, employee may go to nearest hospital or urgent care.</li> <li><b>DWC-1.</b> Provide blank <b>DWC-1</b> to the employee within one working day of finding out about an injury or illness. Injured employees must complete the employee section of the <b>DWC-1</b> if they opt to file a claim.</li> <li>Complete employer's portion of the returned <b>DWC-1</b> form and give a copy to the employee. Retain your copy in a central location — not the employee's personnel file.</li> <li><b>Referral.</b> Refer the employee for appropriate medical treatment at the industrial medical facility designated by the employer (unless the employee has pre-designated to use his or her own physician). Provide a copy of the Workers' Compensation Card to the employee to facilitate the medical provider's intake of the employee and the billing process.</li> <li><b>Report.</b> Complete the <b>Employee Incident Call-In Report</b>. Then, immediately call CharterSAFE's claim hotline <b>(877) 263-9904</b> to report the claim. The hotline service will complete the state-mandated DLSR 5020 (Employer's First Report) for you and will send a copy to CharterSAFE and the claim adjuster. A claim will automatically be established and the adjuster will make contact.</li> <li>There are state-imposed penalties for late or non-reporting. <b>Report Immediately.</b> Stay involved and maintain an open dialogue with the employee — don't assume the claim administrator/adjuster is taking care of everything.</li> </ol>	<p><b>What to do if a student injury requiring professional medical treatment occurs.</b></p> <ol style="list-style-type: none"> <li>Provide first aid, refer student to the family's choice of medical provider, or if needed, call 911 for emergency medical treatment; contact parent/guardian per school policy (always contact immediately for head or eye injuries). Inform the parent that the Student Accident Insurance is available.*</li> <li><b>Claim form.</b> Complete Part 1A of the <b>Gallagher Student Health/BMI Benefits claim form</b> and sign it, then provide the parent/guardian with the claim form, instruction sheet and Student Injury Card. The parents are responsible for submitting a claim within 90 days, if they wish to do so.</li> <li><b>Report.</b> File an incident report by completing the <b>online student injury form at <a href="http://chartersafe.org">chartersafe.org</a></b>. A report number will be assigned and referenced if litigation occurs. <i>(This report is confidential and should NOT be given to parents.)</i> <b>NOTE:</b> This is not considered to be "filing a claim" — for medical bill payment, the parents must also complete the <b>Gallagher Student Health/BMI Benefits</b> claim form and send it to the insurance company, along with the requested documents.</li> </ol> <p>*The Student Accident Insurance (SAI) provided by CharterSAFE covers medical expenses arising from student injuries. The family's health insurance is primary, but if there is no health insurance, the SAI becomes primary. SAI is a no-fault insurance coverage and claims do not impact the school's loss ratio. If parents are made aware of the coverage immediately following an incident, the likelihood of a lawsuit is reduced. The SAI covers students only when they are injured on campus or participating in a school-sponsored off-campus activity.</p>	<p><b>What to do if school-owned vehicle or property is damaged or stolen, liability claim, or employment practices claim is made against the school, or a guest injury occurs on your premises.</b></p> <p><b>NOTE:</b> Any sexual abuse incident/allegation or claim asserted against the school must be reported as soon as it is brought to the attention of the school and mandated report is made — regardless whether a demand letter has been received or not. A delay in reporting could result in a lapse of coverage.</p> <ol style="list-style-type: none"> <li>Complete either the <b>Liability Incident Call-In Report</b> or the <b>Property/Vehicle Loss Incident Call-In Report</b> based upon the nature of the incident. <i>(These forms are confidential and should NOT be given to guests or third parties.)</i></li> <li><b>Report.</b> Then immediately call CharterSAFE's claim hotline <b>(877) 263-9904</b> to report the claim. A claim file will automatically be established and an adjuster will make contact. (This report is confidential and should NOT be given to guests or third parties.) Note: The hotline is a vendor-provided service that is available 24/7 and will contact CharterSAFE immediately in an emergency; they may not be able to answer all of your questions. For claim assistance please call <b>(818) 709-1570</b>.</li> </ol>
<b>IEP DUE PROCESS</b>		<ol style="list-style-type: none"> <li>Complete the <b>IEP Due Process Report</b>.</li> <li><b>Report.</b> Then immediately send the report and an electronic copy of the hearing request to <a href="mailto:cweston@chartersafe.org">cweston@chartersafe.org</a>. A claim adjuster from George Hills will contact you to confirm the assignment of counsel and the amount of your deductible. Note that coverage is "claims made." This means you must report the claim during the policy period in which the hearing is requested, and prior to incurring any legal fees.</li> </ol>

MAY 2017

## EBIA, Check Register

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## Check Register



EBIA  
May 2016

Grand Total 229,671.90

Vendor	Check Number	Voided	Date	Description	Check Amount
Wells Fargo	DB050117		5/1/2017	DB050117; Online Transfer- CC Acct: 2030	6,000.00
Alhambra	4619		5/4/2017	Acct#631790914021372; Water Svc: 03/29, 04/13 & 04/17/17	123.04
Alhambra	4620		5/4/2017	Acct: 631790916125678; Water Srvc: April 2017	20.95
Kelly Atkinson	4621		5/4/2017	Reimb: DVDs & Coloring Book	33.80
Peter Leahey	4622		5/4/2017	Reimb: Algae Kit, 1000 Worms, Poster Tape, Liquid CO2 & Mushroom Farm	133.40
Schoology Incorporated	4623		5/4/2017	Enterprise Subscription 07/01/17 - 06/30/18	5,000.00
Mick Terrizzi	4624		5/4/2017	Reimb: 7th ELA Project Materials, Spotlight Bulb Replacement & Instrument Cables	142.15
Wells Fargo	4625		5/4/2017	Account: 8463; Annual fee: 04/2017 through 03/2018	150.00
Wordplay Speech Therapy Center	4626		5/4/2017	Svc: OT Assessment, Report and IEP/Drive Time & Mileage	686.29
Michael Zacharia	4627		5/4/2017	Bookkeeping Svc: 04/01 - 04/30/17	1,143.75
Change Academy Lake of the Ozarks	4628		5/5/2017	Academic/Therapeutic/Room & Board/Medication Mgmt December 2016	15,563.20
Kaiser Foundation Health Plan	4629		5/5/2017	CustID: 000709549-0000; Billing# 681343504; Insurance Premium: June 2017 + Retroactive Dues	16,590.45
Oakland Unified School District	4630		5/5/2017	2016/17 Facility Use & Custodial Fee	78,363.54
Traffic Engineering, Inc	4631		5/9/2017	Traffic study at Marshall campus	1,000.00
Wells Fargo	DB050917		5/9/2017	DB050917; Online Transfer- CC Acct: 2030	2,000.00
BoardOnTrack, Inc.	4632		5/10/2017	BoardOn Track Statagic Membership for the term 07/01/17 - 06/30/18	2,845.25
Costco Membership	4633		5/10/2017	Executive Business Membership Annual Renewal Notice for June 2017	120.00
Durham School Services	4634		5/10/2017	Customer# 152900; Trip Number: CH2017-2404: 02/27/17	577.59
Michelle Fitts	4635		5/10/2017	Reimb: Activated Charcoal, Genetic Tasting Strips, Design Challenge/Hot Glue Sticks Supplies & etc	107.19
Lake Merritt United Methodist Church	4636		5/10/2017	Facility Rental for AP Exam	550.00
Deborah Lira	4637		5/10/2017	Reimb: Livescan	67.00
SENECA FAMILY OF AGENCIES	4638		5/10/2017	NPS Tuition: 03/01 - 03/31/17	8,888.00

Note: Multiple expenses or "Itemized/Invoice Amounts" may be paid by one check. The total "Check Amount" will appear for each "Itemized/Invoice Amount" paid by the check.

Payroll checks are not included on this register.

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## EBIA, Check Register

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Vendor	Check Number	Voided	Date	Description	Check Amount
Vision Service Plan - (CA)	4639		5/10/2017	Acct# 30 050552 0001; Insurance Premium: May 2017	358.46
American Logistics Company, LLC	4640		5/11/2017	Client# 1551; Special Ed Transportation: April 2017	1,950.00
Lorena Bradley, Ph.D., LLC	4641		5/11/2017	Psych Evaluation: 05/01 - 05/10/17	3,000.00
Comcast	4642		5/11/2017	Account: 930911022; Ethernet Srvc - due: 06/01/17	340.65
EdTec	4643		5/11/2017	Monthly Services: May 2017	10,833.33
Darius Foster	4644		5/11/2017	Reimb: BBall Tournament	149.80
Great American Insurance Goup	4645		5/11/2017	403b Insurance: Employee Annuities	150.00
Mud Howard	4646		5/11/2017	Reimb: Intersession Zines	140.21
Law Offices of Young, Minney & Corr, LLP	4647		5/11/2017	Legal Svcs through 04/30/17	4,465.00
Lesleigh Franklin, PhD	4648		5/11/2017	Pyshological/Assessments w/ Academic Testing	10,000.00
Laura Lira	4649		5/11/2017	Reimb: Mileage 03/16 - 04/28/17 (1416 mi)	757.75
Marissa Maimone	4650		5/11/2017	Reimb: Live Scan	54.00
Marlin Business Bank	4651		5/11/2017	Acct# 1480401; Equipment Financing - due 05/20/17	477.67
Office Depot	4652		5/11/2017	Acct# 16610744; Supplies	370.83
Revolution Foods, Inc.	4653		5/11/2017	Cust# C001339; Food Service: April 2017	4,946.93
Sergio's Janitorial & Yard Services	4654		5/11/2017	School Cleaning: April 2017	4,800.00
Teachers on Reserve	4655		5/11/2017	Substitute Svcs	7,211.69
Commission on Teacher Credentials	M1251		5/12/2017	M1251; 30 day Substitute Permit 12-Month Unlimited Enrollment Subscription/Online	100.00
Apex Learning Inc.	4656		5/16/2017	Professional Development	4,000.00
AT&T	4657		5/16/2017	Acct# 072 085 5436 436; Internet Server + Late Charges	488.24
Comcast	4658		5/16/2017	Acct: 8155 40 039 4380214; High-Speed Internet Svc	106.23
Copower	4659		5/16/2017	Premium: June 2017	2,183.77
Costco Membership	4660		5/16/2017	Executive Business Membership Annual Renewal Notice for July 2017	120.00
Document Tracking Services	4661		5/16/2017	Document Tracking Svcs: 05/05/17 - 05/15/18	395.00
EBMUD	4662		5/16/2017	Acct# 49867400001; Water, Waste Water Charges & Sewer Svcs: 03/02 - 05/02/17	1,117.31
Zach Powers	4663		5/16/2017	Reimb: 7th & 6th Capstone Materials & Field Trip	275.94
Teachers on Reserve	4664		5/16/2017	Substitute Svc	2,077.19
Waste Management Of Alameda County	4665		5/16/2017	Cust# 00513-38904; Waste Svc: April 2017	278.29
Waste Management Of Alamaeda County	4666		5/16/2017	Cust# 14897-08907; Waste Svc: April 2017	452.60

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## EBIA, Check Register

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Vendor	Check Number	Voided	Date	Description	Check Amount
BambooHR	DB051817		5/18/2017	DB051817; HR Tracking Software - Monthly Subscription	207.00
Procopio	4667		5/19/2017	Retainer for legal counsel regarding facilities	2,500.00
Jeffrey Gordon	M1250	Voided	5/26/2017	VOID	(6,601.16)
Alliance Redwoods Conference Grounds	4668		5/30/2017	Contract# 11683; June Intersession Composite Rental (Balance Due)	6,000.00
Teach Speech	4669		5/30/2017	Teach Speech Hours: April 2017	3,218.26
Kelly Atkinson	4670		5/30/2017	Reimb: Digital Copy	13.99
Jeffrey Gordon	4671		5/30/2017	Reimb: Plastic Storage Toles	32.79
Office Depot	4672		5/30/2017	Acct# 16610744; Materials & Supplies	631.16
Brigetta Pryor	4673		5/30/2017	Reimb: Printing of T-Shirts	301.44
Denise Russell-Lewis	4674		5/30/2017	Reimb: Food for Spring Fest	114.01
SENECA FAMILY OF AGENCIES	4675		5/30/2017	NPS Tuition: 04/01 - 04/30/17	5,252.00
Teachers on Reserve	4676		5/30/2017	ust: EASTB0003; Substitute Svc: 05/12/17	2,660.02
Lillian Wood	4677		5/30/2017	Svc: Feb 2016 Intersession Instruction - Staff Support	684.00
PG&E	DB053017		5/30/2017	DB053017; PG&E	2,913.72
Wells Fargo VISA CC (2022)	DB053017A		5/30/2017	DB053017A - Online pymt	1,862.18
Wells Fargo	DB053017B		5/30/2017	DB053017B; Online pymt	8,176.00

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## Credit Card

EBIA  
May 2017

Grand Total 6,200.42

Credit Card	Vendor	Date	Description	Transaction Amount
9515-2030	Fiverr	5/23/2017	04/26 - Fiverr	6.00
9515-2030	Amazon Mktplace Pmts	5/23/2017	04/26 - Amazon Mktplace Pmts	244.37
9515-2030	Amazon Mktplace Pmts	5/23/2017	04/26 - Amazon Mktplace Pmts	168.25
9515-2030	Amazon Mktplace Pmts	5/23/2017	04/26 - Amazon Mktplace Pmts	390.72
9515-2030	Amazon.com	5/23/2017	04/27 - Amazon.com	10.91
9515-2030	Fiverr	5/23/2017	04/30 - Fiverr	6.00
9515-2030	Amazon Mktplace Pmts	5/23/2017	04/30 - Amazon Mktplace Pmts	124.75
9515-2030	Indeed	5/23/2017	05/01 - Indeed	37.16
9515-2030	paypal *Escape Kits	5/23/2017	05/03 - paypal *Escape Kits	19.99
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/04 - AMAZON MKTPLACE PMTS	151.60
9515-2030	Amazon.com	5/23/2017	05/04 - Amazon.com	34.81
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/04 - AMAZON MKTPLACE PMTS	35.53
9515-2030	Amazon.com	5/23/2017	05/04 - Amazon.com	17.47
9515-2030	Girl Scouts of San	5/23/2017	05/05 - Girl Scouts of San	1,016.00
9515-2030	Adobe *Creative Cloud	5/23/2017	05/05 - Adobe *Creative Cloud	19.99
9515-2030	RingCentral, Inc	5/23/2017	05/06 - RingCentral, Inc	610.36
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/06 - Amazon Mktplace Pmts	32.99
9515-2030	Catsone.com	5/23/2017	05/08 - Catsone.com	247.50
9515-2030	Fiverr	5/23/2017	05/08 - Fiverr	6.00
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/08 - AMAZON MKTPLACE PMTS	20.23
9515-2030	Dropbox	5/23/2017	05/08 - Dropbox	9.99
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/09 - Amazon Mktplace Pmts	65.59
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/09 - Amazon Mktplace Pmts	94.68
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/10 - AMAZON MKTPLACE PMTS	118.01
9515-2030	Amazon.com	5/23/2017	05/11 - Amazon.com	471.60
9515-2030	Amazon.com	5/23/2017	05/11 - Amazon.com	17.47
9515-2030	Amazon.com	5/23/2017	05/11 - Amazon.com	207.39
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/11 - Amazon Mktplace Pmts	71.35
9515-2030	Codebender INC	5/23/2017	05/14 - Codebender INC	20.00
9515-2030	APL*Apple Online Store	5/23/2017	05/16 - APL*Apple Online Store	10.00
9515-2030	Amazon Mktplace Pmts	5/23/2017	05/16 - Amazon Mktplace Pmts	88.88
9515-2030	San Joaquin County Office of Education	5/23/2017	05/19 - San Joaquin County Office of Education	750.00

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## EBIA

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Credit Card	Vendor	Date	Description	Transaction Amount
9515-2030	Dropbox	5/23/2017	05/19 - Dropbox	99.00
9515-2030	Amazon.com	5/23/2017	05/21 - Amazon.com	8.73
9515-2030	Fiverr	5/23/2017	05/22 - Fiverr	6.00
9515-2022	Sq*Red Tomatoes	5/23/2017	04/29 - Livescan Vendor - Location fee	287.00
9515-2022	Bay Area Jump	5/23/2017	04/29 - Springfest	239.00
9515-2022	Adobe *Acrobat Std	5/23/2017	05/15 - Adobe *Acrobat Std	155.88
9515-2022	American Refrigeration	5/23/2017	05/19 - Fridge repair at Roosevelt	240.00
9515-2022	Wells Fargo VISA CC (2022)	5/23/2017	05/23 - Wells Fargo VISA CC (2022) - Late Charge	25.00
9515-2022	Wells Fargo VISA CC (2022)	5/23/2017	05/23 - Wells Fargo VISA CC (2022) - Finance Charge	14.22

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