East Bay Innovation Academy

EBIA Board Meeting: November 17, 2026

Date and Time

Tuesday November 17, 2026 at 3:00 PM PST

Location

3400 Malcolm Ave. Oakland, CA 94605

Agenda

		Purpose	Presenter	Time
I.	**Opening Items**			**3:00 PM**
	Opening Items			
	A. Record Attendance and Guests		Brett van Zuiden	1 m
	B. Call the Meeting to Order		Brett van Zuiden	1 m
	C. Opening Session - Public Comment (Any Agenda or Non-Agenda Items)		Brett van Zuiden	15 m
	Public comment is limited to a maximum of 3 minutes of comment time per speaker			
II.	**Board Governance & Consent Agenda**			**3:17 PM**
	A. Review and Approve East Bay Innovation Academy Consent Agenda Items	Vote	Brett van Zuiden	15 m
	1. Approval of Minutes from the October 20, 2026 Regular Board Meeting			
	2. Approval of Minutes from the November 12, 2026 Special Board Meeting			

	Purpose	Presenter	Time

3. Updated Handbook (changed UCP Complaint from Will Kim to Rachel Viegas)
4. General Complaint Procedures
5. Extreme Weather & Outside Physical Activity Safety Protocol
6. Athletics Gender Equity Disclosure
7. EBIA Annual Performance Report
8. ByLaws

III. Executive Director & Principal Update — 3:32 PM

The Executive Director and Principal will share updates on school progress, operations, key priorities, and upcoming initiatives.

A.	Updates:	FYI		10 m

- Enrollment
- Attendance
- Instructional Priorities
- Material Revision Success
- Charter Renewal Petition - Next Steps

IV. Financial Oversight and Organizational Sustainability — 3:42 PM

A.	Updates:	Discuss	Monique Bonilla & Jennifer Rice	10 m

1. EBIA Cash Flow Summary
2. Financial Audit Updates

V. Presentation of Proposed Hybrid Back-Office Support Model — 3:52 PM

		Purpose	Presenter	Time
A.	Presentation & Discussions	Discuss	Monique Bonilla & Rachel Viegas	25 m

1. Proposed hiring of one full-time employee (1.0 FTE)
2. Overview of responsibilities assigned to the proposed position
3. Additional Interim Executive Director responsibilities
4. Additional Principal responsibilities
5. Presentation of potential external back-office service providers
6. Comparison of service offerings, costs, and organizational capacity
7. Proposed division of responsibilities between EBIA staff and the external provider
8. Implementation and transition considerations

B.	Designation of Agency Representative for Employee Compensation Negotiations — Action	Vote	Jennifer Afdahl Rice	5 m

The Board will consider designating one or more Board members to serve as EBIA's authorized representatives for employee compensation negotiations pursuant to Government Code §54957.6.

VI. Closed Session — 4:22 PM

A.	Conference w/ Labor Negotiators Gov. Code §54957.6 & - Designated Representative: Brett Van Zuiden, Board Chair	Vote		15 m

1. Unrepresented Employee Positions: Interim Executive Director; Principal; Director of Regulatory Compliance

B.	Public Employment Matter Gov. Code §54957			10 m

Position Title: Education Specialist
Subject: Consideration of Employee Request for Unpaid Leave of Absence

VII. Reconvene in Open Session and Report Out of Closed Session — 4:47 PM

A.	Information / Possible Action	Discuss		5 m

The Board will reconvene in open session, report any actions required by Government Code §54957.1, and proceed with any publicly noticed action items.

VIII. Employee Compensation and Back-Office Support — 4:52 PM

		Purpose	Presenter	Time
A.	Discussion / Possible Action			5 m
	The Board will consider and potentially approve employee compensation adjustments, the proposed hybrid back-office support model, and the associated budget allocation.			

IX. Closing Items — 4:57 PM

		Purpose	Presenter	Time
A.	Adjourn Meeting	Vote	Brett van Zuiden	1 m

Coversheet

Updates:

Section: IV. Financial Oversight and Organizational Sustainability
Item: A. Updates:
Purpose: Discuss
Submitted by:
Related Material: EBIA FY 25-26 Audit Planning.pdf
EBIA Monthly Cash Flow Summary - Summary-2.pdf

CHRISTY WHITE

Certified Public Accountants serving K-12 School Districts and Charter Schools throughout California

November 5, 2026

To the Board and Management of
East Bay Innovation Academy
Oakland, California

We are engaged to audit the financial statements of East Bay Innovation Academy (the "Organization") for the year ended June 30, 2026. Professional standards require that we provide you with the following information related to our audit. In light of current federal delays, we also find it important to inform you about the audit extension process, should it become necessary due to timing constraints beyond both the Organization's and our control.

Recent K-12 Legislation

California Assembly Bill (AB) 126 was signed by the Governor and effective July 1, 2026. While AB 126 includes numerous new and amended provisions, there are three (3) key items we would like to make you aware of that directly impact the 2025-26 fiscal year audit:

1. **Audit Deadline & Extensions:** The audit deadline is moved from December 15th to January 31st. Although this change allows for additional time, extension requests will be reserved for extenuating circumstances and only in 30-day increments, extending no later than March 31st.
2. **Board Review:** Within 45 days after the issuance of the final audit report, the governing board must accept (or reject) the audit report at a public meeting. The item shall be placed on the board agenda and include review of the audit report, and, if applicable, any audit exceptions/findings, auditor recommendations, and the entity's corrective action plan to remedy the exceptions/findings. Be sure to establish a future board meeting to satisfy this requirement.
3. **Website Posting:** Annual financial and compliance audits (the final audit report) must be posted on the charter school's webpage. Be sure to coordinate with appropriate personnel for website posting.

Timing of the Audit

We began a portion of our audit in Spring 2026 (interim) with additional audit work in Fall 2026 (year-end) with the intent to issue our final audit report no later than January 31st. The final audit report must to be filed with the California Department of Education (CDE), the State Controller's Office (SCO), the local county office of education, and, if separate, the charter authorizer(s). Our firm will handle report submissions; however, if any charter authorizing agency requires submission via a specific portal or platform that is inaccessible to us, we may require that management submit via this requested authorizer method of delivery.

Our Responsibilities

U.S. Generally Accepted Auditing Standards (GAAS) and *Government Auditing Standards*
As stated in our engagement letter dated March 2, 2024, our responsibility, as described by professional standards, is to express an opinion about the financial statements prepared by management with your oversight are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles. Our audit of the financial statements does not relieve the board or management of your responsibilities.

As part of our audit, we will consider the system of internal control of the Organization. Such considerations are solely for the purpose of determining our audit procedures and not to provide any assurance concerning such internal control.

348 Olive Street
San Diego, CA
92103

O: 619-270-8222
F: 619-260-9085
christywhite.com

Our Responsibilities (continued)

U.S. Generally Accepted Auditing Standards (GAAS) and *Government Auditing Standards* (continued)
As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of the Organization's compliance with certain provisions of laws, regulations, contracts, and grants. However, the objective of our tests is not to provide an opinion on compliance with such provisions.

Our responsibility for the supplementary information accompanying the financial statements, as described by professional standards, is to evaluate the presentation of the supplementary information in relation to the financial statements as a whole and to report on whether the supplementary information is fairly stated, in all material respects, in relation to the financial statements as a whole.

Other Information

Planned Scope
An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested.

Our audit will include obtaining an understanding of the Organization and its environment, including the system of internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. Material misstatements may result from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the Organization or to acts by management or employees acting on behalf of the Organization. We will generally communicate our significant findings at the conclusion of the audit. However, some matters could be communicated sooner, particularly if significant difficulties are encountered during the audit where assistance is needed to overcome the difficulties or if the difficulties may lead to a modified opinion. We will also communicate any internal control related matters that are required to be communicated under professional standards.

Significant Risks
As part of our audit planning, we identify significant risks of material misstatement that require special audit consideration. Our audit planning has not yet been concluded and remains in progress; however, according to GAAS, significant risks are presumed to include management override of controls, and revenue recognition. Accordingly, we have considered these as significant risks.

Intended Users
This information is intended solely for the use of the board and management of East Bay Innovation Academy. It is not intended to be, and should not be, used by any other parties.

Please feel free to email Marcy Kearney or Brian Badillo if you have any questions or need clarification regarding the audit.

Sincerely,

Christy White, Inc.
San Diego, California

Marcy Kearney, CPA
Partner
mkearney@christywhite.com

Brian Badillo, CPA
Partner
bbadillo@christywhite.com

EBIA Monthly Cash Flow Summary					
July 2026 - October 2026					
					Total
	July	August	September	October	**July - October**
	2026	2026	2026	2026	**2026**
Revenue	$7,062.16	$462,207.71	$41,179.65	$1,611,389.97	**$2,121,839.49**
Expenses	-$499,582.02	-$356,667.46	-$340,936.26	-$1,018,047.46	**-$2,215,233.20**
Change in Cash	-$492,519.86	$105,540.25	-$299,756.61	$593,342.51	**-$93,393.71**
Beginning Cash	$1,092,635.64	$600,115.78	$705,656.03	$405,899.42	**$1,092,635.64**
Ensing Cash	$600,115.78	$705,656.03	$405,899.42	$999,241.93	**$999,241.93**
Note: October Revenue is so large because many deposits were held up due to to the changing of bank accounts.					
(July - September deposits were returned to ACOE and later deposited in October)					

Coversheet

Presentation & Discussions

Section: V. Presentation of Proposed Hybrid Back-Office Support Model
Item: A. Presentation & Discussions
Purpose: Discuss
Submitted by:
Related Material: Limited Service Agreement EBIA Envision (1).pdf
Job Description - Director of Regulatory Compliance.pdf
EBIA_Hybrid_Back_Office_Board_Presentation.pptx

AGREEMENT FOR LIMITED SERVICES
BETWEEN PROVIDER
AND SCHOOL

Effective Date: July 1, 2026

This Agreement for Limited Services ("Agreement") is entered into and effective July 1, 2026, by and between East Bay Innovation Academy, a California nonprofit public benefit corporation ("SCHOOL"), and Envision Schools, a California nonprofit public benefit corporation ("PROVIDER"), collectively the "Parties", with respect to the following:

A. SCHOOL is organized for public and charitable purposes to operate one or more schools and to provide related comprehensive public education programs for students in grades six through 8;

B. PROVIDER is organized for charitable purposes to promote, support, benefit, and help carry out the purposes of public charter schools, including SCHOOL;

C. In order to benefit and further the charitable purposes of both Parties, SCHOOL and PROVIDER desire to enter into this Agreement for PROVIDER to perform certain task-related services that were historically provided by SCHOOL, thereby allowing SCHOOL to focus on charter school operations.

NOW, THEREFORE, in consideration of the mutual covenants and agreements set forth herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

1. RELATIONSHIP OF THE PARTIES

1.1. PROVIDER and SCHOOL shall each maintain their respective separate corporate existences.

1.2. Except for any obligations created under this Agreement or any other written agreement entered into by and between the Parties, neither Party shall (i) assume or become obligated in any way for the debts, liabilities or obligations of the other Party, or (ii) have any rights or interests in or to any asset of the other Party. The only payment made by SCHOOL to PROVIDER pursuant to this Agreement shall be the compensation specified in Section 4.

1.3. The provisions of this Agreement are not intended to create nor shall be deemed or construed to create any relationship between SCHOOL and PROVIDER other than for the purpose of effectuating this Agreement. Neither of the Parties, nor any of their respective officers, directors, or employees, shall be construed to be the agent, employer, or representative of the other, except as specifically provided herein, or by subsequent written agreement.

1.4. PROVIDER is and shall at all times remain an independent contractor with respect to SCHOOL. Nothing in this Agreement shall be construed to create an employment, partnership, joint

venture, agency, franchise, or other relationship between the Parties. PROVIDER shall have the sole right and obligation to supervise, manage, direct, procure, perform, and control all work performed by PROVIDER under this Agreement. SCHOOL shall have no right to control or direct the manner or means by which PROVIDER performs services under this Agreement, it being understood that SCHOOL's interest is in the results to be achieved. PROVIDER's employees, agents, and contractors are not, and shall not be deemed to be, employees of SCHOOL for any purpose, including but not limited to: (a) federal, state, or local income tax withholding; (b) Social Security, Medicare, or other payroll tax obligations; (c) eligibility for employee benefits of any kind, including health insurance, retirement benefits, or paid leave; or (d) workers' compensation or unemployment insurance coverage. PROVIDER shall be solely responsible for all compensation, benefits, tax withholding, and other obligations with respect to its own employees, agents, and contractors. PROVIDER shall indemnify, defend, and hold harmless SCHOOL from and against any and all claims, liabilities, losses, costs, and expenses (including attorneys' fees) arising out of or related to any claim by any employee, agent, or contractor of PROVIDER that such person is an employee of SCHOOL or is entitled to any employment-related benefits from SCHOOL.

2. TERM OF AGREEMENT

2.1. This Agreement shall take effect on July 1, 2026 for a term of twelve (12) months, ending on June 30, 2027. This Agreement is for a single, fixed term only and shall not automatically renew. Any continuation of services beyond June 30, 2027 shall require a new written agreement executed by both Parties.

2.2. This Agreement may be terminated as follows:

2.2.1. By either SCHOOL or PROVIDER upon one hundred twenty (120) days prior written notice to the other Party, with or without cause;

2.2.2. By mutual agreement of the Parties; or

2.2.3. Upon commencement by either Party of a voluntary case under bankruptcy, insolvency, or similar law; or if any involuntary case under any bankruptcy, insolvency, or similar law is filed against either Party.

2.3. In the event of termination for any reason, the following conditions shall apply:

2.3.1. SCHOOL shall pay PROVIDER any due and unpaid portion of the compensation defined in Section 4 below for services actually performed by PROVIDER through the effective date of termination only. No compensation shall be owed for any services not yet performed as of the effective date of termination.

2.3.2. PROVIDER shall provide reasonable assistance to SCHOOL to transition its services to another service provider or in-house to SCHOOL, during which time SCHOOL shall reimburse PROVIDER for reasonable expenses incurred by PROVIDER in providing such transition assistance, provided that any such expenses must be approved in advance in writing by SCHOOL prior to being incurred. PROVIDER shall not be entitled to reimbursement for any expenses incurred without such prior written approval.

2.3.3. As soon as practicable, PROVIDER shall return to SCHOOL and/or destroy, as appropriate, all student-related, confidential and other records of SCHOOL that are maintained by PROVIDER.

3. LIMITED SERVICES

3.1. PROVIDER shall provide the limited task-related services and support described in Exhibit A attached hereto and incorporated herein by this reference ("Exhibit A"), including the staff necessary to provide this support, to SCHOOL so that SCHOOL will operate in a manner consistent with the terms of its charters and agreements with authorizer(s). The SCHOOL Board and the Board's designated officer shall at all times retain ultimate responsibility for and control of the management and operation of the SCHOOL, including but not limited to governance and the administration and delivery of curriculum, and managing day-to-day operations. PROVIDER's limited services and support are task-related and shall not extend to management or governance of SCHOOL or any charter school operated by SCHOOL, and the services shall be performed at the direction of the SCHOOL Board and its designated officer, who shall retain ultimate decision-making authority at all times. For the avoidance of doubt, all services necessary to operate SCHOOL that are not specifically described in Exhibit A are assumed to be the sole obligation of SCHOOL and not PROVIDER. PROVIDER shall have no responsibility or liability for any services, functions, or operational obligations of SCHOOL not expressly set forth in Exhibit A.

3.2. The services to be provided by PROVIDER are set forth in Exhibit A, attached hereto and incorporated herein by this reference.

3.2.1 Special Education Support. PROVIDER shall provide the following special education oversight and support services: (a) educational psychologist services; (b) special education program management, supervision, and oversight; and (c) coordination of special education compliance, including compliance with applicable state and federal requirements. For the avoidance of doubt, all on-site delivery of special education services, including but not limited to special academic instruction (SAI), related services, and case management, shall be performed by SCHOOL's own employees and shall remain the sole responsibility of SCHOOL site staff. PROVIDER's role with respect to special education is limited to programmatic oversight, supervision, and compliance coordination, and does not include direct delivery of services to students.

3.2.2 Operations, Technology, and Administration. PROVIDER shall provide the following operational and administrative support services: (a) enrollment support; (b) technology support, including day-to-day operational technology needs; and (c) academic leadership supervision and coaching.

3.2.3 Human Resources. PROVIDER shall provide the following human resources support services: (a) employee relations, benefits administration, and personnel support, including serving as a point of contact for SCHOOL staff with HR-related questions; (b) talent acquisition support, including staff recruitment for mid-year openings and future hiring, including posting of open positions; and (c) compliance management and payroll processing.

3.2.4 Finance and Legal. PROVIDER shall provide the following finance and accounting support services: (a) accounting and general business services; (b) accounts payable and accounts receivable processing and management, with support from SCHOOL's Office Manager as needed; and (c) legal services support, including serving as the point of contact for legal matters arising from SCHOOL's operations.

3.2.5 Compliance. PROVIDER shall provide the following compliance support services: (a) state and federal compliance management, including audit support; and (b) compliance with Oakland Unified School District ("OUSD") charter requirements and obligations. SCHOOL site staff shall provide such assistance and documentation as reasonably requested by PROVIDER in connection with compliance activities.

3.2.6 Facilities. PROVIDER shall provide facilities management and oversight services for SCHOOL's site, including coordination of custodial services and facilities-related vendor management. SCHOOL shall remain responsible for payment of all facility-related costs, including rent and custodial expenses, unless otherwise agreed in writing by the Parties.

3.3 PROVIDER will provide assistance and support to SCHOOL in the process of closing its high school program after the conclusion of the 2025-26 school year.

3.4 In connection with the performance of services under this Agreement, PROVIDER shall adhere to all applicable state and federal laws and regulations governing the handling, use, storage, and disclosure of confidential student data and personnel record data, including but not limited to the Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. 1232g, the California Student Privacy Act, and all other applicable provisions of state and federal law applicable to SCHOOL. PROVIDER shall implement and maintain reasonable administrative, technical, and physical safeguards to protect the confidentiality, integrity, and security of student and personnel records in its possession or control. PROVIDER shall not use, disclose, or permit access to any confidential student data or personnel record data except as necessary to perform its obligations under this Agreement or as required by applicable law. In the event of any actual or reasonably suspected unauthorized access to, use, or disclosure of confidential student data or personnel record data, PROVIDER shall promptly notify SCHOOL and cooperate with SCHOOL in investigating and remediating such incident. Upon termination or expiration of this Agreement, PROVIDER shall return or destroy all confidential student data and personnel record data in accordance with Section 2.3.3 of this Agreement and applicable law.

4. COMPENSATION

4.1. As compensation for the services described in Exhibit A, SCHOOL agrees to pay PROVIDER fifteen percent (15%) of the general purpose entitlement funding (as defined in Education Code Section 47632(a)) of SCHOOL as projected by PROVIDER on or about July 1, 2026 ("Base Services Fee"). The Base Services Fee shall be invoiced as a single lump sum payment due and payable in full no later than July 1, 2026. In the event this Agreement is terminated prior to June 30, 2027 for any reason, PROVIDER shall reimburse SCHOOL a pro rata portion of the Base Services Fee corresponding to the unexpired portion of the Agreement term remaining as of the effective date of termination. Such reimbursement shall be calculated by dividing the Base Services Fee by 365 and multiplying the result by the number of days remaining in the Agreement term after the effective date of

termination, and shall be paid by PROVIDER to SCHOOL within thirty (30) days of the effective date of termination. This is subject to section 2.3.1 above.

4.2. As further consideration for the services described in Exhibit A, SCHOOL shall make available to PROVIDER furnished shared office and administrative space at SCHOOL's offices, for the term of this Agreement. PROVIDER is to provide its own equipment, materials and supplies that are necessary for PROVIDER's services.

5. LIABILITY

5.1. Insurance

5.1.1. SCHOOL will maintain customary and reasonable insurance, including coverage for professional liability for errors or omissions and/or directors and officers, comprehensive general liability coverage, and automobile liability coverage. SCHOOL will name PROVIDER as an additional insured under all SCHOOL policies.

5.1.2. PROVIDER will procure and maintain customary and reasonable insurance, including coverage for professional liability for errors or omissions and/or directors and officers, comprehensive general liability coverage, and automobile liability coverage.

5.1.3. Each Party is responsible for obtaining and maintaining workers' compensation coverage and unemployment insurance for its employees.

5.2. It is the intent of the Parties that SCHOOL be responsible for its own debts and obligations. Nothing in this Agreement shall be construed as imposing on PROVIDER any liability arising out of the operations of SCHOOL, except such liability that may result from the provisions of services by PROVIDER to SCHOOL.

5.3. Each Party ("Indemnifying Party") agrees to defend, indemnify, and hold harmless the other Party and its employees, officers, directors, and agents (collectively, "Indemnified Party") from and against any and all liability, loss, claims, demands, damages, expenses, and costs (including attorneys' fees, expert witness fees, and other costs of litigation or other proceedings) of every kind or nature arising out of or related to: (a) any act, omission, negligence, or willful misconduct of the Indemnifying Party or its employees, officers, directors, agents, or contractors in connection with this Agreement or the Indemnifying Party's operations; (b) any breach by the Indemnifying Party of any representation, warranty, covenant, or obligation under this Agreement; or (c) any liability created by the Indemnifying Party that is imposed upon or asserted against the Indemnified Party. The obligations of this Section shall not apply to the extent that any such liability, loss, claim, demand, damage, expense, or cost is caused solely by the negligence or willful misconduct of the Indemnified Party. The indemnification obligations set forth in this Section shall survive the expiration or earlier termination of this Agreement.

6. NOTICE

All notices, requests, offers or demands or other communications (collectively "Notice") given to or by the Parties under this Agreement shall be in writing and shall be deemed to have been duly given: (i) on the date of service if personally served on the Party to whom Notice is to be given; (ii) seventy-two (72)

hours after mailing by United States mail first class, registered or certified mail, postage prepaid, addressed to the Party to whom Notice is to be given, at such Party's address set forth below; or (iii) on the date sent if sent by email to the email address of the Party set forth below, provided that no automated notice of delivery failure is received by the sending Party. Any Party may change its address or email address for Notice purposes by providing written notice to the other Party in accordance with this Section.

To PROVIDER:
Envision Education
100 Webster Street
Oakland, CA 94607
Attn: Chief Executive Officer
Email: Jillian@envisionschools.org

To SCHOOL:
East Bay Innovation Academy
3400 Malcolm Avenue
Oakland, CA 94605
Attn: Board President
Email: Brettcvz@gmail.com

7. FIDUCIARY OBLIGATIONS

The Boards of Directors for each Party has reviewed the scope of services and compensation provided in this Agreement in good faith, and in a manner in which they believe to be in the best interests of their respective organizations, and with such care, including reasonable inquiry, as an ordinary prudent person in a like position would use under similar circumstances, and have determined that the services contained herein are in the best interests of SCHOOL, and that the compensation to be paid by SCHOOL to PROVIDER for said services is fair and reasonable.

8. HEADINGS

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

9. ASSIGNMENT

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

10. ENTIRE AGREEMENT

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

11. AMENDMENTS

No supplement, modification or amendment of this Agreement shall be binding unless executed in writing by both Parties. The Parties anticipate additional services to be provided and negotiated directly by designees of the SCHOOL and PROVIDER boards.

12. WAIVER

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

13. CONTROLLING LAW

This Agreement shall be governed by and interpreted under the laws of the State of California.

14. ENFORCEMENT

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

15. DISPUTE RESOLUTION

15.1 In the event of any controversy or claim arising out of or relating to this Agreement, or the breach thereof, the Party asserting the dispute shall provide written notice to the other Party setting forth in reasonable detail the nature of the dispute, the specific provisions of this Agreement at issue, and the relief sought (“Dispute Notice”). No Party may initiate mediation or arbitration unless and until a Dispute Notice has been provided in accordance with this Section.

15.2. Board Chair Meeting. Within fifteen (15) days of receipt of a Dispute Notice, the Board Chairs of SCHOOL and PROVIDER shall meet and confer in good faith, either in person or by video conference, in an attempt to resolve the dispute. If the dispute is not resolved within thirty (30) days of receipt of the Dispute Notice (or such longer period as the Parties may agree in writing), either Party may proceed to mediation pursuant to Section 15.3.

15.3. Mediation. If the dispute is not resolved through the board chair meeting process described in Section 15.2, the Parties shall submit the dispute to non-binding mediation before a single mediator mutually agreed upon by the Parties. If the Parties are unable to agree on a mediator within ten (10) days of either Party's written request for mediation, the mediator shall be selected in accordance with the mediation procedures of the American Arbitration Association. The costs of the

mediator shall be shared equally by the Parties. Each Party shall bear its own attorneys' fees and costs in connection with mediation. If the dispute is not resolved within thirty (30) days of the commencement of mediation (or such longer period as the Parties may agree in writing), either Party may proceed to arbitration pursuant to Section 15.4.

15.4. Arbitration. If the dispute is not resolved through mediation pursuant to Section 15.3, any controversy or claim arising out of or relating to this Agreement, or the breach thereof, shall be finally settled by binding arbitration in accordance with the Commercial Arbitration Rules of the American Arbitration Association, and judgment upon the award rendered by the arbitrator(s) may be entered in any court having jurisdiction. The arbitration shall take place in Oakland, California. The costs of the arbitrator shall be shared equally by the Parties, subject to the prevailing Party's right to recover attorneys' fees pursuant to Section 16 of this Agreement.

16. ATTORNEYS' FEES

In the event any action at law or in equity or other proceeding is brought to interpret or enforce this Agreement, or in connection with any provision of this Agreement, the prevailing Party shall be entitled to its reasonable attorneys' fees and other costs reasonably incurred in such action or proceeding.

17. AUTHORITY TO CONTRACT

Each Party warrants to the other that it has the authority to enter into this Agreement, that it is a binding and enforceable obligation of said Party, and that the undersigned has been duly authorized to execute this Agreement.

18. COUNTERPARTS

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

IN WITNESS WHEREOF, the Parties have executed this Agreement as of the date set forth above.

SCHOOL	PROVIDER
East Bay Innovation Academy	Envision Schools
By: Miranda Thorman, Executive Director	By:
Name: Miranda Thorman	Name: Jillian Juman
Its:	Its:
Date: May 26, 2026	Date: 26/05/2026, 2026

EXHIBIT A -- DESCRIPTION OF PROVIDER SERVICES

4907-6905-2312, v. 4

Implementation of Limited Services Agreement by Functional Area

AREA	EBIA	Envision
SPED	**Services** ● Hire, supervise, and evaluate special education teachers and service providers. ● Ensure services in IEPs are implemented daily. ● Manage classroom accommodations, modifications, and related services. **Compliance** ● Ensure day-to-day compliance with special education laws. ● Conduct evaluations, assessments, IEP meetings, and service delivery. ● Maintain all student records and IEP documentation. ● Support response to state audits and complaints regarding special education services. **Budgeting** ● Pay for special education staffing, related services, assessments, and external providers. NOTE: Envision is planning for Nicole (their current psych, who is coming to Envision) to hold their psych work. However, the cost needs to be covered by EBIA. Estimated for 2026-2027 at about 70K. QUESTION: Assessment costs and payment structure. ● Track actual expenses and maintain funding compliance documentation. ● Maintain SELPA membership. **Parent Engagement and Communications** ● Conduct IEP meetings with parents/guardians. ● Implement parent communications and accommodations. ● Ensure timely responses to parent requests and procedural safeguards.	**Services** ● Advise on staffing ratios, hiring, and credentialing requirements for special education teachers and support staff. ● Recommend professional development and training programs for special education staff. ● Coordinate with schools on vendor services (speech therapy, occupational therapy, psychological services). **Compliance** ● Provide guidance on compliance with federal and state laws, including: ○ IDEA (Individuals with Disabilities Education Act) ○ Section 504 of the Rehabilitation Act ○ ADA (Americans with Disabilities Act) ○ State-specific special education regulations and reporting requirements ● Advise on maintaining compliance documentation, timelines for evaluations, IEP (Individualized Education Program) meetings, and student accommodations. ● Provide templates, policy guidance, and monitoring tools for legal compliance. ● Respond to state audits or complaints regarding special education services. **Budgeting** ● Submit payments for special education staffing, related services, assessments, and external providers. **Parent Engagement and Communications** ● Advise on best practices for parent communication and engagement regarding IEPs and accommodations. ● Provide templates or guidance for notice letters, parent rights documentation, and dispute resolution processes.
Enrollment	**Data** ● Oversee the day to day management of student/family; data must be owned and controlled by EBIA **Brand and messaging approval** ● School has final say on how it is represented publicly **Compliance**	**Systems and tools** ● Enrollment platform setup and management (e.g., SchoolMint, OE) ● Application tracking and reporting dashboards ● Website updates and inquiry forms **Data and pipeline management** ● Tracking leads, applications, offers, and enrollment yield ● Weekly pipeline reports (inquiries → applications → enrollments)

	• Alignment with state and local enrollment laws (especially in California—open access, non-discrimination, lottery rules) **Scope of work** • Exactly what campaigns, systems, and support the CMO provides • What is optional vs. included **Strategy and goals** • Enrollment targets • Priority student populations • School-specific messaging and positioning **Tactics** • Intent to return • Recruitment events • Family contacts **Community relationships** • School tours, events, and family engagement • Partnerships with feeder schools and community orgs **Final decisions** • Admissions policies and lottery oversight • Final enrollment determinations	• Identifying gaps and trends **Marketing execution** • Creation and posting of organic digital campaigns (social media ads, Google ads) • Email and SMS campaigns to families • Creation of print materials (flyers, mailers) **Process management** • Application timelines and lottery setup (if applicable) • Enrollment packet systems and documentation workflows
Technology	**Strategy/Planning** • Approve technology budgets and purchasing. • Implement technology plans and allocate resources on-site. • Make final decisions on software/hardware adoption. **Network Infrastructure** • Maintain day-to-day network operations, Wi-Fi, servers, and devices. • Troubleshoot hardware or connectivity issues locally. • Coordinate with vendors for repairs or on-site installations. **Support/Help Desk** • Handle first-line troubleshooting and user support for teachers, staff, and students. • Escalate complex issues to EE or vendors as needed. • Maintain inventory of devices and software licenses. **Data Management & Reporting** • Input, maintain, and manage student and staff data in systems. • Generate reports for internal decision-making and	**Strategy/Planning** • Advise on technology strategy aligned to academic goals a and operational needs. • Recommend hardware, software, and systems (student information systems, learning platforms, communication tools). • Provide technology roadmaps and budget planning guidance. • Support data governance and compliance policies (FERPA, CIPA, etc.). **Network Infrastructure** • Provide support network design, security protocols, and vendor selection. • Offer technical guidance for system upgrades or expansion. • Ensure compliance with cybersecurity standards. **Data Management & Reporting** • Provide guidance on student information systems, assessment data, and analytics. • Ensure compliance with reporting requirements to authorizers, state agencies, or funders. • Advise on data privacy, backups, and cybersecurity protocols. **Support/Help Desk** • Provide remote helpdesk support, ticketing systems, and escalation

	compliance. ● Ensure daily data security practices are followed. **Devices** ● Has legal responsibility for IT systems. ● Performs daily device management or on-site technical support unless specifically contracted. ● Makes decisions about IT purchases. ● Owns the devices and systems (Chromebooks, hotspots, LMS, etc.). ● Maintains decision-making authority (what to buy, policies, priorities). **Training** ● Deliver on-site training and coaching to teachers and staff. ● Ensure staff adherence to technology policies and protocols.	frameworks. ● Advise on IT support policies, SLAs, and service standards**.** **Devices** ● Device procurement guidance (sometimes purchasing on the school's behalf) ● Setup, imaging, and inventory systems ● Help desk / troubleshooting support ● Network and systems administration **Training** ● Develop IT training programs for staff and students. ● Provide guidance on best practices for using learning platforms and digital tools
Legal	**Scope of Legal Services** ● Retains ultimate legal responsibility for operations, contracts, and compliance. ● Engages directly with outside attorneys for matters requiring formal legal advice or representation. ● Approves and signs legal agreements and contracts. **Support** ● Sign contracts and make binding agreements. ● Retain counsel for litigation or formal legal matters. ● Ensure compliance with court orders, settlements, or legal findings.	**Scope of Legal Services** ● Provides guidance and coordination on legal matters related to school operations. ● Advises on compliance with local, state, federal laws, and charter authorizer requirements. ● May draft templates or policies (employment contracts, student handbooks, board policies, vendor agreements). ● Coordinates with external legal counsel for specialized issues (labor law, special education, real estate, contracts). **Support** ● Review draft contracts before submission. ● Advise on labor law compliance during hiring, layoffs, or HR disputes. ● Recommend best practices for student discipline policies or safety compliance.
Compliance	**Local Compliance** ● Implement day-to-day compliance with local laws. ● Maintain required permits, inspections, and documentation. ● Respond to local audits or inspections **State Compliance** ● Ensure day-to-day adherence to state laws. **Federal Compliance** ● Ensure day-to-day adherence to federal laws. ● Collect, maintain, and submit federal reporting	**Local Compliance** ● Advise on compliance with local ordinances and regulations, including: ○ Zoning and occupancy requirements ○ Health, safety, and sanitation codes ○ Local labor laws and collective bargaining agreements ● Provide templates, guidance, and advisory support for reporting and documentatio**n** required by city or county authorities. **State Compliance** ● Submit official reports to the state and maintain required records

	documentation. ● Implement federal funding requirements in programs and staffing. **Charter Authorizer** ● Submit official reports to the authorizer. ● Maintain compliance with all operational, academic, and financial requirements specified in the charter. ● Serve as primary contact with the authorizer.	on-site. ● Ensure staff certifications, attendance records, and instructional materials meet state standards. ● Respond to state audits, site visits, or compliance reviews. ● Provide guidance on California Education Code requirements, if applicable, including: ○ Teacher credentialing and certification verification ○ Curriculum alignment and instructional standards ○ Student attendance and enrollment reporting ○ Assist in preparing required state submissions, such as: ○ Annual School Accountability Reports ○ Financial reports for state funding ○ Health and safety compliance documentation **Federal Compliance** ● Submit official reports to the state and maintain required records on-site. ● Ensure staff certifications, attendance records, and instructional materials meet state standards. ● Respond to state audits, site visits, or compliance reviews. ● Advise on compliance with federal laws and regulations, such as: ○ FERPA (Family Educational Rights and Privacy Act) ○ IDEA (Individuals with Disabilities Education Act) ○ Title I, II, III, IV funding requirements ○ CIPA (Children's Internet Protection Act) ● Provide frameworks for policies, reporting, and recordkeeping. ● Support grant compliance monitoring and federal audits. **Charter Authorizer** ● Advise on charter agreement requirements and renewal processes. ● Develop resorts and documents for: ○ Board reporting ○ Academic performance tracking ○ Financial compliance reporting ● Support preparation for authorizer site visits or audits.
Facilities	EBIA pays rent. EBIA has the lease and has legal responsibility for the facility. EBIA performs day-to-day operations or maintenance unless explicitly contracted.	**1. Facility Identification and Leasing Support** ● Assist the school in identifying suitable facilities that meet programmatic needs. ● Provide guidance and support for lease negotiations, renewals, and related documentation. ● Advise on space utilization and site planning as needed. ● EBIA manages relationships with OUSD. **2. Regulatory Compliance Support** ● Assist the school in ensuring facilities comply with all applicable local, state, and federal regulations, including:

		○ Fire and life safety codes ○ Accessibility standards (ADA compliance) ○ Health and sanitation regulations ○ Occupancy and zoning requirements ● Provide guidance on maintaining permits, certificates of occupancy, and inspection readiness. **3. Maintenance and Operations Advisory** ● Support facility maintenance, repairs, janitorial services, and security. ● Provide direct contact with vendors and service providers, but does not assume direct operational responsibility unless specifically contracted. **4. Budgeting and Financial Guidance** ● Support the school in forecasting and planning for facility-related costs, including utilities, repairs, and preventive maintenance. ● Provide guidance on budget tracking and reporting related to facility expenses. **5. Risk Management and Insurance Support** ● Advise the school on facility insurance coverage (property, liability, casualty) and risk mitigation strategies. ● Ensure documentation of facility-related risks and recommended mitigations.
HR/Talent	EBIA assumes **legal responsibility for the** staff. EBIA **directly hires/fires staff** EBIA makes **personnel decisions**, which remain under school authority. EBIA manages the EBIA union CBA and union relationship. EBIA covers staffing costs, including benefits. **Job Posting** ● Officially posts the open positions (on the school website, job boards, or HR systems). ● Ensures postings meet legal and contractual requirements, including union/collective bargaining agreements if applicable. **Interviewing** ● Conducts primary interviews for teachers, staff, and administrators. ● Makes final hiring recommendations or decisions,	**Recruitment & Staffing Support:** ● Develop recruitment strategies. ● Support job description creation and alignment with school goals. ● Recommend competitive compensation and benefits practices within budget parameters. **Professional Development & Retention:** ● Provide support for talent retention strategies. **Compliance & Reporting:** ● Ensure HR policies and practices comply with applicable labor laws and collective bargaining agreements. ● Provide reporting requirements related to staffing, certifications, and personnel records. **Performance Management Advisory:** ● Provide frameworks and guidance for evaluating teacher and staff performance. ● Support HR in implementing performance review cycles and improvement plans **Performance Issues** ● Support the Principal in managing performance issues **Job Posting**

	consistent with school policies and legal requirements.	• Support the development of job descriptions, required qualifications, and competitive compensation. • Provide templates or guidance for postings. • Coordinate with the school on advertising positions on recruitment platforms or CMO networks. **Interviewing:** • Provides interview frameworks, rubrics, and evaluation guidance. • Participates in interview panels or advisory interviews, especially for key leadership or mission-critical roles.
Finance	**Expenses** • Pay for audit and accounting services • Pay for banking fees, tax preparation, and all other financial obligations **Budgeting/Financial Planning** • Provide input for budgets and financial plans • Implement budget allocations • Make final financial decisions, including purchases, contracts, and payroll **Cash Flow & Management** • Maintain the bank account • Provide access to banking and accounting software **Audit/Compliance** • Support the collection of documentation for auditors • Implement required corrective actions **Payroll & Benefits** • Provide day to day support for payroll, including completing and submitting timesheets to Envision • Approve and submit vendor invoices, contracts, and consultant agreements to Envision • Pay for banking fees and financial obligations • Provide access to payroll software	**Budgeting/Financial Planning** • Provide annual and multi-year budgeting. • Provide revenue forecasting (state funding, federal grants, local funding, donations). • Recommend allocation of funds across programs, staffing, and operational needs. • Support development of financial policies and internal controls. • Prepare and submit official budgets for board approval **Accounting and Reporting** • Maintain day-to-day accounting records, including revenue, expenses, payroll, and invoices. • Submit official reports to authorizers and funders. • Ensure accuracy of financial statements and reconciliation of accounts. • Provide financial reporting and reconciliation. • Advise on compliance with accounting standards, including GAAP or GASB as applicable. • Support preparation of required reports for authorizers, state agencies, or federal funders. **Cash Flow & Management** • Provide cash flow forecasting, reserve management, and banking relationships. • Recommend policies for accounts payable, receivable, and investment management. **Audit/Compliance** • Prepare for annual audits and internal control reviews. • Engage auditors and respond to audit findings. • Maintain all financial documentation for inspection and compliance purposes • Provide documentation for regulatory compliance for local, state, federal, and authorizer's financial requirements. • Review financial policies and procedures for risk mitigation and adherence to grant/funding conditions. • Work directly with the tax prepare to submit annual reports

		Payroll & Benefits ● Provide payroll systems, benefits administration, and compliance with labor laws. ● Provide reporting for payroll and HR-related expenses.
Academic Program	**Curriculum Design & Selection** ● Select and approve final curriculum and instructional materials. ● Adapt and implement curriculum based on student needs and local context. ● Ensure curriculum is delivered with fidelity in classrooms. **Instructional Practices + Teacher Support** ● Implement instructional practices in classrooms. ● Conduct teacher coaching, observation, and evaluation. ● Ensure daily instructional quality and student engagement. **Assessment and Data Systems** ● Administer assessments (state, interim, classroom-based). ● Ensure data entry, accuracy, and reporting compliance. ● Lead data analysis and instructional adjustments at the classroom and school level. **Academic Performance and Accountability** ● Own student outcomes and academic performance results. ● Develop and execute school-based improvement plans. ● Report results to boards, authorizers, and stakeholders. **Compliance** ● Ensure compliance in daily instructional delivery and scheduling. ● Maintain records for instructional minutes, courses, and assessments. ● Submit required reports to state and authorizer.	**Curriculum Design & Selection** ● Recommend curriculum frameworks, instructional materials, and scope & sequence aligned to state standards. ● Provide model curricula, pacing guides, and unit plans. ● Advise on curriculum adoption and alignment across grade levels and subjects. ● Ensure alignment with graduation requirements and college/career readiness standards. **Instructional Practices + Teacher Support** ● Provide instructional frameworks and pedagogical models (e.g., project-based learning, standards-based instruction). ● Design and deliver professional development for teachers and leaders. ● Offer coaching models, observation tools, and instructional rubrics. **Assessment and Data Systems** ● Recommend assessment strategies, including interim, benchmark, and formative assessments. ● Provide data systems, dashboards, and reporting tools (if included in LSA). ● Develop data analysis protocols and cycles of inquiry. ● Advise on alignment with state testing requirements and accountability systems. **Academic Performance and Accountability** ● Provide performance benchmarks, goals, and monitoring frameworks. ● Support analysis of student achievement data and subgroup performance. ● Advise on school improvement planning and intervention strategies. **Compliance** ● Advise on compliance with: ○ State academic standards ○ Instructional minute requirements ○ Graduation and course requirements ○ Assessment and accountability systems ● Provide guidance on documentation and audit readiness.

Signature: Jillian Juman (May 26, 2026 14:48:46 EDT)

Email: jillian@envisionschools.org

Director of Regulatory Compliance Job Description
Grades 6-8 | East Bay Innovation Academy

About East Bay Innovation Academy
East Bay Innovation Academy (EBIA) is a public charter school in Oakland, CA serving students in grades 6-8. Our mission is to prepare a diverse group of students to succeed in college and to become thoughtful, engaged citizens who are leaders and innovators in a 21st-century global world. Through personalization, project-based learning, and the integration of technology, EBIA engages students in meaningful work that develops the competencies necessary for success in college, career, and civic life.

Our collaborative, interdisciplinary model reflects the rich racial, cultural, and socio-economic diversity of Oakland. We serve a vibrant student body that is approximately 40% Hispanic/Latino, 27% Black, 16% White, and 8% Two or More Races. Our commitment to equity is central to our work: approximately 25% of our students are individuals with disabilities, and our student body reflects the rich linguistic diversity of Oakland, with a substantial portion of our community identifying as Multilingual Learners.

Position Overview & Reporting Structure
The Director of Regulatory Compliance reports to the Principal and leads EBIA's schoolwide regulatory reporting. The primary responsibility is to ensure accurate, timely state and federal submissions and meet reporting obligations to Oakland Unified School District (OUSD) and county agencies. The Director also leads grant development and administration, oversees day-to-day human resources and records compliance, and coordinates payroll and financial processes with the Office Manager and EBIA's back-office providers.

Key Responsibilities
Regulatory Reporting & Compliance

- Maintain a schoolwide compliance calendar covering reporting, grants, HR, and governance obligations. Set internal deadlines, assign contributors, identify required approvals, and track each item through completion.
- Coordinate preparation, review, certification, and submission of required reports, including, as applicable, CALPADS, CBEDS, attendance and enrollment (P-1, P-2, and annual reporting), the Local Control and Accountability Plan (LCAP), School Accountability Report Card (SARC), Consolidated Application, and fiscal and authorizer reports. Manage submissions in the designated systems, including OUSD's Epicenter where applicable.
- Monitor updates to laws, agency guidance, funding conditions, and authorizer requirements; translate changes into clear action items for school personnel.

- Work with attendance, instructional, special education, HR, and finance leads to verify source data, reconcile discrepancies across reports, and coordinate corrections. Confirm required approvals and retain submission confirmations and supporting records.
- Coordinate responses to agency and authorizer inquiries with the Principal, including documentation for charter renewal, monitoring visits, and corrective actions.
- Keep the Principal informed of upcoming deadlines, decisions needed, and risks that could affect a submission, funding, or charter compliance.

Grants & Restricted Funding

- Identify public and private funding opportunities with the Principal. Assess eligibility, alignment with school priorities, and the capacity to meet grant commitments. Lead proposal development and submission, including narratives, budgets, assurances, and supporting documents.
- Track application and award deadlines, approved spending periods, deliverables, reporting, renewals, and closeout in the compliance calendar.
- Coordinate administration of awarded grants and restricted funds, including Measure G1. Maintain approved plans and amendments, document allowable costs and required approvals, and prepare program and expenditure reports.
- Work with program leads, the Office Manager, and back-office providers to reconcile spending against award terms, confirm supporting records, and resolve discrepancies.

Human Resources Oversight & Labor Relations

- Oversee day-to-day HR administration and serve as the school-based contact for routine employee HR questions. Coordinate with designated HR providers, payroll staff, and counsel as directed by the Principal.
- Track HR deadlines, including required notices and trainings, employee evaluations, credential and certification renewals, and timelines under the collective bargaining agreement (CBA). Flag upcoming expirations and overdue items to the Principal.
- Verify credentials, permits, certifications, and required clearances. Coordinate hiring paperwork, onboarding, benefits administration, leave and accommodations, and offboarding. Maintain confidential personnel records.
- Support the Principal with employee relations, complaints, investigations, and disciplinary matters by organizing records, tracking deadlines, coordinating meetings, and drafting correspondence for review.
- Support day-to-day administration of the CBA and personnel policies. Review proposed personnel actions for applicable contract terms, notice requirements, and timelines. Coordinate grievances with the Principal, including deadlines, documentation, draft responses, and follow-through on resolutions.
- Support the Principal in union negotiations by gathering relevant data, coordinating with finance to assess proposal costs, preparing bargaining materials, attending sessions as assigned, and tracking implementation of agreed changes.

Financial & Payroll Coordination

- Serve as EBIA's primary school-based liaison to its back-office and payroll providers. Coordinate fiscal reporting, budget development, and review of budget-to-actual results with the Principal and providers. Flag discrepancies and items requiring a decision.
- Work with the Office Manager to maintain complete records for purchasing, invoices, receipts, deposits, reimbursements, and contracts. Follow up on missing documentation and reconcile discrepancies with providers.
- Coordinate each payroll cycle with the Office Manager and payroll provider. Review timesheets and approved pay, leave, and staffing changes, confirm timely processing, and resolve discrepancies through EBIA's established approval procedures.
- Maintain separation of duties for preparing, reviewing, and approving payroll and financial transactions in accordance with EBIA's internal controls.

Audits, Privacy & Schoolwide Compliance

- Coordinate school-based preparation for financial audits, authorizer oversight, grant reviews, and regulatory monitoring. Maintain the documentation needed for review and track findings, corrective actions, and deadlines through closure.
- Oversee student records procedures under FERPA and applicable California privacy requirements. Coordinate family records requests, staff training, and secure access and disclosure. Work with IT and designated staff to review vendor data-sharing practices and escalate suspected privacy incidents to the Principal.
- Maintain EBIA's retention schedule for student, personnel, payroll, financial, grant, and compliance records. Monitor secure storage, authorized access, preservation for audits or legal matters, and secure disposal.
- Coordinate responses to California Public Records Act requests as assigned. Track applicable governance filings, required public notices, and policy review deadlines with the Principal and designated Board personnel. Support designated compliance leads in routing formal complaints, including those under the Uniform Complaint Procedures, and tracking response deadlines and required documentation.
- Train the Office Manager to assist with reporting, grants, payroll, and recordkeeping. Document procedures and backup coverage, delegate appropriate tasks, and review work for accuracy and timely completion.
- Perform all other duties as assigned by the Principal.

Qualifications & Requirements

- Bachelor's degree in public administration, business, education administration, finance, or a related field, or equivalent relevant experience.
- At least three years of progressively responsible experience in regulatory compliance, government reporting, grants administration, school business or finance, or a related

field. Demonstrated ability to manage concurrent deadlines, validate data, and communicate clearly with staff and external agencies.
- Preferred qualifications include California charter school or district experience, familiarity with CDE and OUSD reporting systems, and experience with grant administration, payroll coordination, or HR and collective bargaining in a unionized workplace.

Performance Expectations
- Required submissions are accurate and timely, with confirmations available for review. The Principal receives early notice of risks or decisions that could affect deadlines.
- Restricted-funding expenditures are supported by approved plans and records. Audit findings and corrective actions are tracked through completion.
- Payroll discrepancies, credential expirations, and grievance deadlines are identified early and addressed or escalated promptly.

Reporting Structure & Scope of Authority
The Director is responsible for coordinating deadlines, verifying completion, and escalating unresolved matters. Designated staff and providers are responsible for source records and specialized work. Formal certifications, financial approvals, personnel decisions, and bargaining commitments follow EBIA’s delegated authority and approval procedures.

Base Salary Range
$125,000–$145,000

MONIQUE BONILLA + RACHEL VIEGAS | 25-MINUTE PRESENTATION

Proposed Hybrid Back-Office Support Model

December 2026 – June 2027

- One new Director of Regulatory Compliance (1.0 FTE)
- Expanded Interim ED and Principal responsibilities
- Targeted support from a new external back-office provider
- Alternative to the current Envision Limited Services Agreement

Why Consider a Change?

- Current Envision LSA: $482,376 for the 2026–27 year
- Address authorizer concerns about Envision’s financial stability
- Protect continuity of finance, HR, compliance, and school operations
- Build stronger EBIA-based ownership and accountability

Transition remains a proposal; contract obligations and continuity must be verified.

New 1.0 FTE | Director of Regulatory Compliance

- Own regulatory calendar and state, federal, and OUSD reporting
- Lead grants, restricted funding, and compliance documentation
- Coordinate school-based HR, payroll, and employee records
- Support audits, privacy, charter renewal, and corrective actions
- Serve as primary liaison to the external back-office provider

Reports to Principal • Proposed December–June cost: $84,583 + $12,600 benefits

Expanded Interim Executive Director Role

- On-site in Oakland 5 days per month, likely Board meeting week
- Design and implement staff professional-development learning arc
- Coach Principal; provide instructional support and feedback
- Co-lead family/community town halls with Principal
- Mobilize charter-renewal support; meet Board and community in person

Proposed additional December–June cost: $35,000

Expanded Principal Role

- Assume additional HR and personnel oversight responsibilities
- Take on compliance and operational duties no longer provided by Envision
- Supervise the Director of Regulatory Compliance
- Coordinate school-based work with the new back-office provider
- Partner with Interim ED on instruction, staff learning, and town halls

Proposed additional December–June cost: $21,000

Proposed Division of Responsibilities

Interim ED	Leadership, instructional support, staff learning, charter renewal, community
Principal	Daily school leadership, HR oversight, compliance accountability
Compliance Director	Reporting, grants, HR administration, audit readiness, payroll coordination
External provider	Finance/accounting, budget and cash flow, payroll processing, fiscal reporting

External provider scope is illustrative, based on historical EdTec SOW; new scope and price require confirmation.

Estimated Transition Cost | Dec 2026 – Jun 2027

Interim ED additional cost	**$35,000**
Principal additional cost	**$21,000**
New Compliance Director	**$84,583**
New FTE benefits	**$12,600**
External back-office support	**$105,000**

TOTAL ESTIMATED 7-MONTH COST **$258,183**

Not directly comparable with Envision's $482,376 annual LSA; verify overlapping costs, contract exit terms, and full-year run rate.

Transition Priorities & Board Discussion

- Confirm Envision LSA termination terms and continuity obligations
- Finalize external provider scope, proposal, and implementation timeline
- Recruit/onboard Compliance Director; define decision rights and controls
- Transfer financial, payroll, HR, grant, and compliance records securely
- Review full-year cost and transition risks before final approvals

Board discussion: Is this the right operating model for EBIA's sustainability and renewal?