



## Lake View Charter School

### Regular Scheduled Board Meeting

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#### Date and Time

Wednesday May 26, 2021 at 5:00 PM PDT

#### Location

285 E 5th Street  
Chico CA 95926

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Topic: Lake View Board Meeting

Time: May 26, 2021 05:00 PM Pacific Time (US and Canada)

Join Zoom Meeting

<https://zoom.us/j/91855472518>

Meeting ID: 918 5547 2518

One tap mobile

+16699006833,,91855472518# US (San Jose)

+12532158782,,91855472518# US (Tacoma)

Dial by your location

+1 669 900 6833 US (San Jose)

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

+1 646 558 8656 US (New York)

+1 301 715 8592 US (Washington DC)

+1 312 626 6799 US (Chicago)

Meeting ID: 918 5547 2518

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Find your local number: <https://zoom.us/j/8481111111>

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## Agenda

### I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

C. Approval of the Agenda

D. Closed Session

Public Employee Performance Evaluation: Executive Director

Conference with Legal Counsel: Anticipated Litigation

Significant exposure to litigation pursuant to paragraph (2) or (3) of subdivision (d) of section 54956.9: (one case)

E. Announcement of Action Taken in Closed Session

F. Public Comments

G. Approve Minutes

Approve minutes for Special Board Meeting on April 28, 2021

H. Approve Minutes

Approve minutes for Regular Scheduled Board Meeting on April 28, 2021

I. Executive Director's Report

### II. Finance

A. April Financials

B. Expanded Learning Opportunities (ELO) Grant Plan

C. Discussion and Potential Action on Executive Director Compensation Study

D. Stipend Chart

E. Extra Duty Stipend Contract

This contract outlines the duties for stipends

### III. Academic Excellence

- A. Local Control and Accountability Plan and Budget Overview for Parents
- B. Vote to Open Public Hearing
- C. Public Hearing for Local Control and Accountability Plan (LCAP) and Budget Overview for Parents (BOP)
- D. Vote to Close Public Hearing

### IV. Operations

- A. Benefits Package Options
- B. Teacher Induction Program and Policy
- C. Employee Handbook 2021-2022

### V. Governance

- A. Discussion and Potential Action on Board Meeting Date Change for June 2021 and Calendar for the 2021-2022 School Year

**Proposed** date change for June Governing Board meeting to **Monday, June 14, 2021 at 4:30 PM.**

The scheduled June 2021 GB meeting is Wednesday, June 23 at 5:00 pm.

- B. Discussion and Potential Action on Board Member Recruitment
- C. Upcoming Compliance Items

### VI. Closing Items

- A. Board of Director's Comments & Requests
- B. Announcement of Next Regular Scheduled Board Meeting

Proposed New Date: June 14, 2021 @ 4:30 pm

(Current Calendar Date: June 23, 2021 at 5:00 p.m.)

- C. Adjourn Meeting

Public Comment Rules: Members of the public may address the Board on agenda or non-agenda items through the teleconference platform, Zoom. Zoom does not require the members of the public to have an account or login. Please either utilize the chat option to communicate to the administrative team of your desire to address the Board or simply communicate orally your desire to address the Board when the Board asks for public comments. Speakers may be called in the order requests are received. Comments are limited to 2 minutes each, with no more than 15 minutes per single topic. If a member of the public utilizes a translator to address the Board, those individuals are allotted 4 minutes each. If the Board utilizes simultaneous translation equipment in a manner that allows the Board to hear the translated public testimony simultaneously, those individuals are allotted 2 minutes each. By law, the Board is allowed to take action only on items on the agenda. The Board may, at its discretion, refer a matter to school staff or calendar the issue for future discussion.

Note: The Governing Board encourages those with disabilities to participate fully in the public meeting process. If you need a disability-related modification or accommodation, including auxiliary aids or services, to participate in the public meeting, please contact the Governing Board Office at (562) 584-0427 at least 48 hours before the scheduled board meeting so every reasonable effort can be made to accommodate you. (Government Code § 54954.2; Americans with Disabilities Act of 1990, § 202 (42 U.S.C. § 12132)).

# Coversheet

## Approve Minutes

**Section:** I. Opening Items  
**Item:** G. Approve Minutes  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for Special Board Meeting on April 28, 2021



# Lake View Charter School

## Minutes

### Special Board Meeting

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#### Date and Time

Wednesday April 28, 2021 at 4:45 PM

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Zoom Link: <https://zoom.us/j/94419326665>

Meeting ID: 944 1932 6665

Join by Phone: (669) 900-6833

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#### Directors Present

Glad Donahue (remote), Jessica Coombs (remote), Lindsay Mower (remote)

#### Directors Absent

Billie Adkins

#### Guests Present

Darcy Belleza (remote), Jen Kramer (remote), Julie Haycock-Cavender (remote), Katie Royer (remote), Kimmi Buzzard (remote)

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### I. Opening Items

#### A. Record Attendance

#### B. Call the Meeting to Order

Lindsay Mower called a meeting of the board of directors of Lake View Charter School to order on Wednesday Apr 28, 2021 at 4:48 PM.

### C. Approval of the Agenda

Glad Donahue made a motion to approve the agenda.

Lindsay Mower seconded the motion.

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

#### Roll Call

Billie Adkins Absent

Lindsay Mower Aye

Glad Donahue Aye

Jessica Coombs Aye

### D. Public Comments

No public comments.

## II. Operations

### A. Board Resolution - 2021-4 - Spin-off of School Participant Accounts from Inspire Plan

Lindsay Mower made a motion to approve Board Resolution - 2021-4 - Spin-off of School Participant Accounts from Inspire Plan.

Glad Donahue seconded the motion.

This Board Resolution would authorize Royce Gough, Facilities and Operations Director, to manage the new program.

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

#### Roll Call

Jessica Coombs Aye

Glad Donahue Aye

Lindsay Mower Aye

Billie Adkins Absent

## III. Closing Items

### A. Board of Director's Comments & Requests

No comments.

### B. Adjourn Meeting

Lindsay Mower made a motion to adjourn the meeting.

Glad Donahue seconded the motion.

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

#### Roll Call

Glad Donahue Aye

Jessica Coombs Aye

**Roll Call**

Billie Adkins Absent

Lindsay Mower Aye

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 4:54 PM.

Respectfully Submitted,  
Lindsay Mower

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Prepared by  
Katie Royer

Noted by

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**Board Secretary**

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# Coversheet

## Approve Minutes

**Section:** I. Opening Items  
**Item:** H. Approve Minutes  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for Regular Scheduled Board Meeting on April 28, 2021



# Lake View Charter School

## Minutes

### Regular Scheduled Board Meeting

---

#### Date and Time

Wednesday April 28, 2021 at 5:00 PM

#### Location

285 E 5th Street  
Chico CA 95926

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Zoom Link: <https://zoom.us/j/94419326665>

Meeting ID: 944 1932 6665

Join by Phone: (669) 900-6833

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#### Directors Present

Glad Donahue (remote), Jessica Coombs (remote), Lindsay Mower (remote)

#### Directors Absent

Billie Adkins

#### Guests Present

Bryanna Brossman, Darcy Belleza (remote), Darlington Ahaiwe (remote), Dr. Amanda Johnson (remote), Jenell Sherman (remote), Julie Haycock-Cavender (remote), Kaela Haydu (remote), Katie Royer (remote), Kimmi Buzzard (remote), Kristie Nicosia (remote), Royce Gough (remote), Samantha Myers (remote), Shannnon Breckenridge (remote), Stacy Close (remote)

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#### I. Opening Items

**A. Record Attendance**

**B. Call the Meeting to Order**

Lindsay Mower called a meeting of the board of directors of Lake View Charter School to order on Wednesday Apr 28, 2021 at 5:01 PM.

**C. Approval of the Agenda**

Jessica Coombs made a motion to approve the agenda.

Glad Donahue seconded the motion.

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

**Roll Call**

Jessica Coombs Aye

Billie Adkins Absent

Glad Donahue Aye

Lindsay Mower Aye

**D. Public Comments**

No public comments.

**E. Approve Minutes**

Glad Donahue made a motion to approve the minutes from Regular Scheduled Board Meeting on 03-24-21.

Lindsay Mower seconded the motion.

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

**Roll Call**

Jessica Coombs Aye

Billie Adkins Absent

Glad Donahue Aye

Lindsay Mower Aye

**F. Approve Minutes**

Glad Donahue made a motion to move closed session before the Executive Director Report.

Lindsay Mower seconded the motion.

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

**Roll Call**

Glad Donahue Aye

Lindsay Mower Aye

Billie Adkins Absent

Jessica Coombs Aye

Lindsay Mower made a motion to approve the minutes from Special Board Meeting on 04-13-21.

Glad Donahue seconded the motion.

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

**Roll Call**

Glad Donahue Aye  
Lindsay Mower Aye  
Billie Adkins Absent  
Jessica Coombs Aye

**G. Closed Session**

Lindsay Mower made a motion to go into closed session at 5:05 PM.

Glad Donahue seconded the motion.

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

**Roll Call**

Lindsay Mower Aye  
Jessica Coombs Aye  
Glad Donahue Aye  
Billie Adkins Absent

**H. Announcement of Action Taken in Closed Session**

Lindsay Mower made a motion to come out of closed session.

Jessica Coombs seconded the motion.

No action or decisions were made during closed session.

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

**Roll Call**

Billie Adkins Absent  
Jessica Coombs Aye  
Lindsay Mower Aye  
Glad Donahue Aye

**I. Executive Director's Report**

Julie Haycock-Cavender presented the *Executive Director's Report*.

- Letters of Intent and Open Enrollment
- Staffing Update
- Stacy Close presented a proposed amendment for English Learner Master Plan
- Dr. Amanda Johnson contributed a Special Education and Student Support update
- An Assessment Update was presented by Kristie Nicosia
- Program Planning 2021-2022

**J. Sequoia Grove Charter Alliance Update**

Sara Rose Bonetti and Royce Gough presented the Sequoia Grove Charter Alliance update:

- SGCA Board Update
- Staffing Update
- Current Budget

## II. Finance

### A. March Financials

Glad Donahue made a motion to approve March Financials.

Jessica Coombs seconded the motion.

Darlington Ahaiwe presented the March Financials.

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

#### Roll Call

Lindsay Mower Aye

Glad Donahue Aye

Billie Adkins Absent

Jessica Coombs Aye

### B. Acknowledgment Resolution for the Selling of Additional Receivables to Charter School Capital

Lindsay Mower made a motion to approve Acknowledgment Resolution for the Selling of Additional Receivables to Charter School Capital.

Glad Donahue seconded the motion.

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

#### Roll Call

Jessica Coombs Aye

Lindsay Mower Aye

Billie Adkins Absent

Glad Donahue Aye

### C. CDE approved Federal Addendum

Jessica Coombs made a motion to approve CDE approved Federal Addendum.

Glad Donahue seconded the motion.

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

## III. Governance

### A. Discussion and Potential Action on Bylaws and Board Terms

Lindsay Mower made a motion to to keep the current Bylaws and Board Terms the same.

Glad Donahue seconded the motion.

Discussion regarding staggering 2-year terms so that the board is never all new board members.

The current LVCS Board of Directors is staggered.

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

**Roll Call**

Glad Donahue Aye

Lindsay Mower Aye

Billie Adkins Absent

Jessica Coombs Aye

**B. Discussion and Potential Action on Board Meeting Calendar for the 2021-2022 School Year**

Glad Donahue made a motion to approve keeping the board meetings on Wednesdays at 5:00 PM for the 2021-2022 school year.

Jessica Coombs seconded the motion.

Discussion on keeping the board meetings on Wednesdays at 5:00 PM.

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

**Roll Call**

Jessica Coombs Aye

Billie Adkins Absent

Glad Donahue Aye

Lindsay Mower Aye

**C. Executive Director Evaluation Update**

The same Executive Director Evaluation template used last year will be used with the Executive Director self-evaluation, staff feedback survey, and a closed session meeting between board members and executive director.

Evaluation templates will be sent to Board members.

**IV. Academic Excellence**

**A. English Learner Master Plan 2020-2021**

Glad Donahue made a motion to approve the English Learner Master Plan 2021-2022.

Lindsay Mower seconded the motion.

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

**Roll Call**

Glad Donahue Aye

Jessica Coombs Aye

Lindsay Mower Aye

Billie Adkins Absent

**B. Local Control and Accountability Plan (LCAP) Update**

Darcy Belleza and Shannon Breckenridge presented a second LCAP and ELO Board Presentation.

**C. Child Abuse Prevention and Reporting Policy**

Glad Donahue made a motion to approve the Child Abuse Prevention and Reporting Policy.

Jessica Coombs seconded the motion.

The policy presented is currently board-approved and housed within the Comprehensive Safety Plan. The staff recommended that the Board approve a stand alone policy to publish on the school's website for more transparency and ease of access to the public. The board **VOTED** unanimously to approve the motion.

**Roll Call**

Billie Adkins Absent  
Jessica Coombs Aye  
Glad Donahue Aye  
Lindsay Mower Aye

**D. SELPA Master Contract**

This item was tabled until next meeting.

**E. Board Letter to Families Supporting STAR Assessment Participation**

Lindsay Mower made a motion to approve Board Letter to Families Supporting STAR Assessment Participation.

Glad Donahue seconded the motion.

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

**Roll Call**

Jessica Coombs Aye  
Glad Donahue Aye  
Lindsay Mower Aye  
Billie Adkins Absent

**V. Closing Items**

**A. Board of Director's Comments & Requests**

Lindsay Mower mentioned the need for another LVCS board member.

Shannon Breckenridge updated that one person has responded to the survey requesting board membership.

Lindsay Mower requested contact information for the interested party be sent to her for board review for vote at May board meeting.

**B.**

### Announcement of Next Regular Scheduled Board Meeting

The Board announced the next regular scheduled Board Meeting on May 26, 2021 at 5:00 pm.

### C. Adjourn Meeting

Lindsay Mower made a motion to adjourn the meeting.

Glad Donahue seconded the motion.

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

#### Roll Call

Glad Donahue Aye

Billie Adkins Absent

Jessica Coombs Aye

Lindsay Mower Aye

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 6:38 PM.

Respectfully Submitted,  
Lindsay Mower

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Prepared By:  
Katie Royer

Noted By:

#### Board Secretary

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# Coversheet

## Executive Director's Report

**Section:** I. Opening Items  
**Item:** I. Executive Director's Report  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** LVCS May 21 ED Slides.pdf



# Executive Director's Report

May 2021



# Agenda

- Sequoia Grove Updates:
  - Benefits & Open Enrollment
  - Technology
- Enrollment
- Master Agreements
- ThinkSuite Update
- Enrichment Updates
- EL Updates
- Educational Services
- Community Programs
- Instructional Teams



A photograph of a forest with a bright sunburst effect filtering through the trees. The sun is positioned in the upper left quadrant, creating a starburst pattern of light rays that spread across the scene. The forest floor is covered in lush green ferns, and several large, thick tree trunks are visible, some with rough, textured bark. The overall atmosphere is serene and natural.

## What's happening In the Grove?

# Benefits 21/22! Open Enrollment



**Save**  
these dates

**2021 OPEN ENROLLMENT**  
**MAY 14–MAY 28**

**CHANGE, ADD, DROP...  
IT'S YOUR CHOICE!**

This is the one time each year that you can elect to make changes to your health insurance elections. This year, you **MUST** make a benefit election—if you don't, you will not have insurance!

**LEARN MORE ABOUT THIS YEAR'S PLANS!**  
Attend one of the live webinars hosted by our insurance broker's office. Learn about the plans offered this year, as well as the additional resources available during Open Enrollment!

**THIS YEAR, ENROLL WITH *ease***  
We are excited to launch a new online enrollment system, *Ease!* Visit your *Ease!* portal during Open Enrollment to make elections for your insurance. Any changes you elect will be effective July 1, 2021.

**QUESTIONS ABOUT YOUR INSURANCE PLANS?**  
Contact the Employee Support Center for dedicated support and advocacy year-round.  
Email: [LosAngeles.ESC@ajg.com](mailto:LosAngeles.ESC@ajg.com)  
Phone: (855) 670-2222



RECORDINGS WILL ALSO BE AVAILABLE



Employee  
Benefits  
Guide

July 1, 2021 –  
June 30, 2022



## TECH REFRESH

Sequoia Grove is in the process of surveying all staff regarding their school-issued technology to plan for upgrades to staff computers as needed.

**Sequoia Grove is in the process of securing 2 office spaces for staff (CSO & Schools) work space, materials and records and tech.**

**Sacramento- 50 & Watt  
Roseville- Douglas Blvd**

**Sequoia  
Grove  
Offices**

**underway.....**



**SEQUOIA GROVE  
CHARTER ALLIANCE**



# ENROLLMENT UPDATE



175

Students to  
fill Goal

## ENROLLMENT UPDATE

Thank you to the team working hard  
to import all new students!



Confirmed Incoming  
New Students

53

Returning Students

417

Current Enrollment  
To Date

470

Total Number of  
Students Goal:

645

173 additional students on the waitlist or in-process of Reg-Online

# Congratulations to our Graduating Class of 2021

Under the direction of Shannon Breckenridge,  
our High School team is coordinating a very  
honoring Graduation for our Seniors.



It's time to celebrate!

## HIGH SCHOOL GRADUATION 2021

May 26, 2021 • 8:30 pm  
West Wind Drive-In  
9616 Oates Dr, Sacramento, CA 95827

Download the [Graduation Program](#)  
Tune in to the Graduation Movie using 93.5 FM

A collection of colorful icons representing graduation and entertainment: a blue graduation cap with a yellow tassel, a yellow diploma, a red and white striped popcorn bucket, and a black clapperboard with a white play button icon.

## Last week we held a virtual Promotion for 8th Graders and for Kindergarteners



A yellow poster with a blue graduation cap icon. The text reads: 'SAVE THE DATE', 'MAY 20 2021 @4PM', and '8TH GRADE PROMOTION CEREMONY'. At the bottom, it says 'Complete THIS survey if you are interested in participating in and/or planning the ceremony.'

**SAVE THE DATE**

**MAY 20 2021 @4PM**

**8TH GRADE PROMOTION CEREMONY**

Complete [THIS](#) survey if you are interested in participating in and/or planning the ceremony.



A dark blue poster with a chalkboard background and a drawing of a planet. The text reads: 'SPONSORED BY COMMUNITY CONNECTIONS', 'KINDERGARTEN PROMOTION', 'Join us for a morning of memory making celebrations!', 'Sign up HERE to have your child included in a virtual slideshow presentation. (Deadline to register is Friday, May 14 @ 5pm.)', 'SAVE THE DATE', 'FRIDAY, MAY 21 @ 11AM ON ZOOM', and 'OPTIONAL: MAKE A CAP AND GOWN'. Contact information for Traci Callanan and Kindel Bedore is provided.

SPONSORED BY COMMUNITY CONNECTIONS

**KINDERGARTEN PROMOTION**

Join us for a morning of memory making celebrations!  
Sign up [HERE](#) to have your child included in a virtual slideshow presentation. (Deadline to register is Friday, May 14 @ 5pm.)

**SAVE THE DATE**

**FRIDAY, MAY 21 @ 11AM ON ZOOM**

**OPTIONAL: MAKE A CAP AND GOWN**

For questions: [traci.callanan@cottonwood.school](mailto:traci.callanan@cottonwood.school) or [kindel.bedore@cottonwood.school](mailto:kindel.bedore@cottonwood.school)

# ThinkSuite Update

## Agreement ends 6/30

Our schools were in a one year contract. We looked at continuing some services with them.



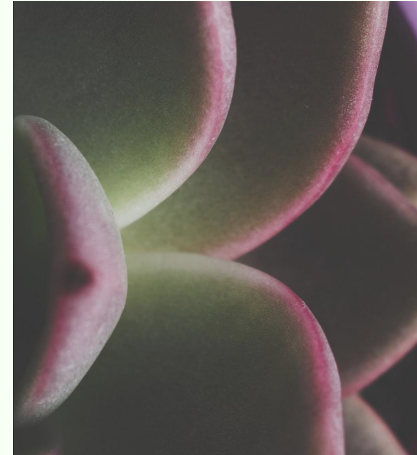
## Closing

ThinkSuite/Provenance/Inspire District Office is closing its doors 6/30.



## What does that mean for us?

We have CSO ready to launch. We will need to use a new ordering system



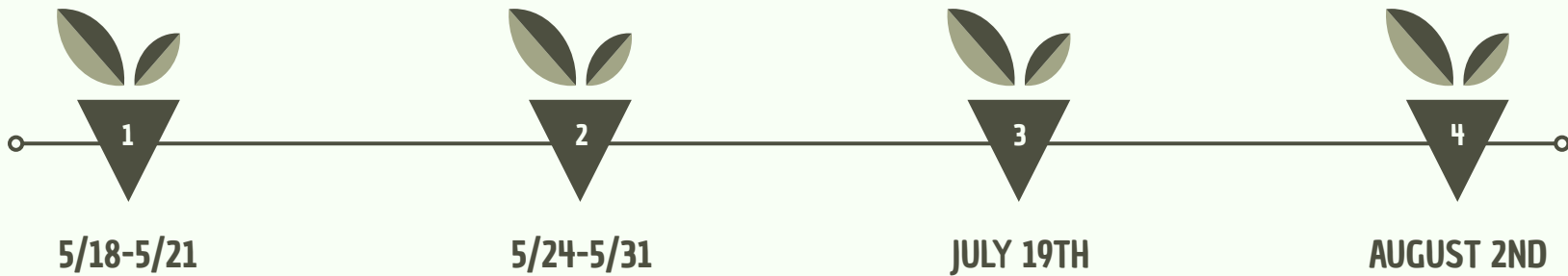


## Enrichment Updates

New ordering system will be Online Purchasing System (OPS)

- Made for schools
- Other schools use
- OPS provides training videos, but we will be working to create our own videos and text walkthroughs
- CSO and school staff will support schools with the new system





All Staff and Leadership trained in OPS to support families and approve orders. Families with signed MA received instructions and logins on May 21st.

Returning families with signed MA can pre-order products to be processed by SGCA Enrichment team in July. Orders approved by staff by EOB on June 2nd,

Returning students with signed MAs can begin placing orders again, to be approved when HST's return from break, August 2nd.

All new students connect with HST and create a learning plan, sign MA, and begin placing orders. Punch-Out available & Service orders can be placed to begin 8/16.

# AB 1316....what can I do?





**THANK YOU AS ALWAYS FOR  
VOLUNTEERING YOUR TIME TO SERVE  
OUR SCHOOL! IT IS VERY APPRECIATED.**



# Coversheet

## April Financials

**Section:** II. Finance  
**Item:** A. April Financials  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Lake View\_Financial Package\_April 2021.pdf



# Lake View Charter School

Monthly Financial Presentation – April 2021

# LAKE VIEW - Highlights

- Year-end revenue projections increased by \$174k.
- Year-end expense projections increased by \$152k.
- Year-end surplus projected at \$24k. (Prior month; \$1.4k)
- Senate Bill-740 Requirements:

- 40/80 Expense Ratio ✓

Cert.	Instr.
45.4%	81.6%
237,568	81,660

- 25:1 Pupil-Teacher ratio ✓

Pupil:Teacher Ratio
18.88 :1

# LAKE VIEW - Revenue

- State Aid-Rev: Recognition of received PPP loan. **(\$174,877)**

	Year-to-Date			Annual/Full Year		
	Actual	Budget	Fav/(Unf)	Forecast	Budget	Fav/(Unf)
<b>Revenue</b>						
State Aid-Rev Limit	\$ 2,388,527	\$ 2,379,424	\$ 9,103	\$ 3,985,537	\$ 3,986,237	\$ (700)
Federal Revenue	27,675	32,228	(4,553)	80,328	51,676	28,652
Other State Revenue	235,194	183,295	51,898	393,438	346,966	46,472
Other Local Revenue	10,654	-	10,654	10,654	-	10,654
<b>Total Revenue</b>	<b>\$ 2,662,049</b>	<b>\$ 2,594,947</b>	<b>\$ 67,102</b>	<b>\$ 4,469,957</b>	<b>\$ 4,384,878</b>	<b>\$ 85,079</b>

# LAKE VIEW - Expenses

- **Books and Supplies:** Increase in projected *Instructional Supplies* expense.
- **Sub agreement Services:** Increase in projected *Enrichment Services* expense.

Expenses	Year-to-Date			Annual/Full Year		
	Actual	Budget	Fav/(Unf)	Forecast	Budget	Fav/(Unf)
Certificated Salaries	\$ 1,530,463	\$ 1,433,514	\$ (96,949)	\$ 1,826,382	\$ 1,720,217	\$ (106,165)
Classified Salaries	109,293	110,365	1,072	118,969	132,438	13,469
Benefits	504,630	483,649	(20,981)	587,440	579,242	(8,199)
Books and Supplies	673,368	353,811	(319,557)	788,493	391,770	(396,723)
Subagreement Services	514,378	812,637	298,259	619,662	919,333	299,671
Operations	77,969	25,083	(52,886)	94,393	30,100	(64,293)
Facilities	463	2,667	2,204	463	3,200	2,737
Professional Services	420,541	398,134	(22,406)	505,026	489,046	(15,980)
Depreciation	-	-	-	-	-	-
Interest	72,574	76,059	3,485	80,110	94,219	14,109
<b>Total Expenses</b>	<b>\$ 3,903,679</b>	<b>\$ 3,695,919</b>	<b>\$ (207,760)</b>	<b>\$ 4,620,938</b>	<b>\$ 4,359,564</b>	<b>\$ (261,374)</b>

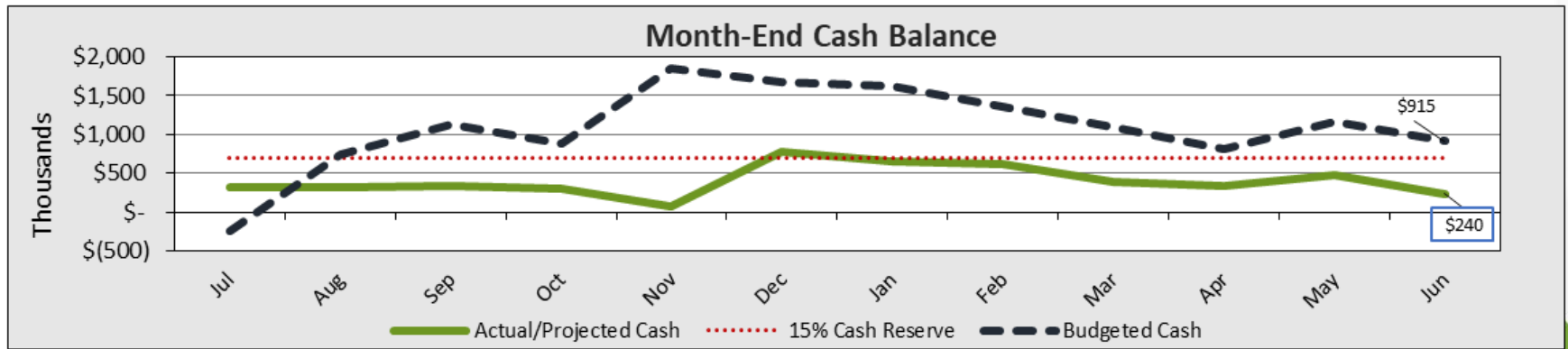
# LAKE VIEW - Fund Balance

- Increase to projected surplus consistent with PPP loan recognition.

	Year-to-Date			Annual/Full Year		
	Actual	Budget	Fav/(Unf)	Forecast	Budget	Fav/(Unf)
<b>Total Surplus(Deficit)</b>	<b>\$ (1,093,592)</b>	<b>\$ (917,118)</b>	<b>\$ (176,474)</b>	<b>\$ 24,003</b>	<b>\$ 25,314</b>	<b>\$ (1,311)</b>
Beginning Fund Balance	<u>221,864</u>	<u>221,864</u>		<u>221,864</u>	<u>221,864</u>	
<b>Ending Fund Balance</b>	<b><u>\$ (871,728)</u></b>	<b><u>\$ (695,254)</u></b>		<b><u>\$ 245,867</u></b>	<b><u>\$ 247,178</u></b>	
<i>As a % of Annual Expenses</i>	<i>-18.9%</i>	<i>-15.9%</i>		<i>5.3%</i>	<i>5.7%</i>	

# LAKE VIEW - Cash

- Positive cash levels projected with year-end cash balance projected at \$240k.





# LAKE VIEW - Appendix

- Monthly Cash Flow / Forecast 20-21
- Budget vs. Actual
- Statement of Financial Position
- Statement of Cash Flows
- Check Register
- AP Aging
- Due-To/Due-From Balance

# Lake View Charter School

## Monthly Cash Flow/Forecast FY20-21

Revised 5/16/2021

ADA = 434.25



### Revenues

#### State Aid - Revenue Limit

	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Year-End Accruals
8011 LCFF State Aid	-	375,600	-	338,040	338,040	338,040	338,040	338,040	176,118	86,242	83,074	81,995	1,262,771
8012 Education Protection Account	-	-	-	21,713	-	-	21,712	-	-	21,701	-	-	21,724
8019 State Aid - Prior Year	-	-	(699)	-	-	-	-	-	72	35	-	-	-
8096 In Lieu of Property Taxes	-	8,990	(8,990)	-	48,751	11,471	11,471	11,471	20,647	10,324	10,037	10,037	9,177
	-	384,590	(9,689)	359,753	386,791	349,511	371,223	349,511	196,837	118,302	93,111	92,032	1,293,672

#### Federal Revenue

8181 Special Education - Entitlement	-	-	-	-	-	-	-	-	-	-	10,531	10,531	31,592
8296 Other Federal Revenue	-	-	-	484	-	27,191	-	-	-	-	-	174,877	-
	-	-	-	484	-	27,191	-	-	-	-	10,531	185,408	31,592

#### Other State Revenue

8311 State Special Education	-	-	25,672	37,123	23,105	23,105	23,105	23,105	11,506	5,634	5,425	16,886	68,598
8550 Mandated Cost	-	-	-	-	-	8,238	-	-	-	-	-	-	-
8560 State Lottery	-	-	-	-	-	-	24,714	-	-	24,102	-	-	37,599
8598 Prior Year Revenue	-	-	-	-	-	-	1,548	-	-	-	-	-	-
8599 Other State Revenue	-	-	-	-	-	484	2,043	658	30,788	-	-	-	-
	-	-	25,672	37,123	23,105	31,827	51,410	23,763	42,294	29,736	5,425	16,886	106,197

#### Other Local Revenue

8980 Contributions, Unrestricted	-	-	-	-	-	10,654	-	-	-	-	-	-	-
	-	-	-	-	-	10,654	-	-	-	-	-	-	-

### Total Revenue

	-	384,590	15,983	397,360	409,896	419,183	422,633	373,274	239,131	148,038	109,067	294,326	1,431,461
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### Expenses

#### Certificated Salaries

1100 Teachers' Salaries	111,179	101,482	102,143	103,403	101,850	102,645	102,863	101,843	103,223	102,908	100,883	100,883	-
1175 Teachers' Extra Duty/Stipends	2,000	3,400	7,150	6,550	6,996	7,196	6,946	6,946	8,046	6,996	7,083	7,083	-
1200 Pupil Support Salaries	20,774	21,274	21,824	21,854	21,669	13,897	14,297	14,297	14,297	14,297	14,297	14,297	-
1300 Administrators' Salaries	24,867	25,317	25,767	25,887	25,697	25,897	25,697	25,697	25,697	25,697	25,697	25,697	-
	158,820	151,473	156,884	157,694	156,213	149,635	149,802	148,782	151,262	149,897	147,960	147,960	-

#### Classified Salaries

2900 Other Classified Salaries	13,231	12,103	12,667	12,847	12,148	13,277	10,034	13,913	4,637	4,436	4,838	4,838	-
	13,231	12,103	12,667	12,847	12,148	13,277	10,034	13,913	4,637	4,436	4,838	4,838	-

#### Benefits

3101 STRS	25,173	24,067	24,941	24,820	24,747	21,895	23,691	23,527	23,927	23,707	22,118	22,118	-
3301 OASDI	792	722	757	768	725	795	605	845	281	269	146	146	-
3311 Medicare	2,392	2,265	2,355	2,370	2,338	2,259	2,217	2,259	2,163	2,133	2,088	2,088	-
3401 Health and Welfare	15,625	24,855	19,347	19,715	17,545	21,891	19,887	19,306	17,620	17,595	14,375	14,375	-
3501 State Unemployment	1,579	584	-	-	-	-	6,129	473	62	196	662	662	-
3601 Workers' Compensation	2,161	1,793	1,977	1,977	1,977	1,977	1,977	1,477	1,977	1,977	2,016	2,016	-
3901 Other Benefits	-	-	-	63	-	-	-	(1,073)	-	14,157	-	-	-
	47,723	54,286	49,378	49,712	47,332	48,817	54,506	46,813	46,030	60,033	41,405	41,405	-

#### Books and Supplies

4302 School Supplies	4,977	86,972	47,863	56,800	33,553	50,625	37,108	52,765	84,334	85,876	54,087	54,087	-
4305 Software	-	5,922	10,018	14,672	3,879	12,102	3,455	4,488	2,716	12,737	3,475	3,475	-
4310 Office Expense	-	-	1,010	-	313	495	-	9	-	-	-	-	-
4400 Noncapitalized Equipment	524	4,743	2,088	11,800	11,719	2,843	-	-	16,559	10,402	-	-	-
	5,501	97,637	60,980	83,272	49,464	66,066	40,563	57,262	103,609	109,016	57,562	57,562	-

#### Subagreement Services

5102 Special Education	133	11,441	1,481	12,521	37,924	8,463	18,407	3,325	54,954	6,125	9,183	9,183	-
5106 Other Educational Consultants	9,209	3,522	16,282	13,788	6,734	13,805	21,508	11,187	45,354	33,226	18,378	18,378	-
5107 Instructional Services	19,210	17,788	18,499	18,499	18,499	18,499	18,499	18,499	18,499	18,499	25,080	25,080	-
	28,552	32,751	36,262	44,807	63,156	40,767	58,414	33,012	118,808	57,850	52,642	52,642	-

#### Operations and Housekeeping

5201 Auto and Travel	-	-	-	-	-	-	-	-	-	-	-	-	-
5300 Dues & Memberships	-	790	-	-	-	-	-	-	-	5,600	-	-	-
5400 Insurance	1,500	10,544	6,028	6,024	6,024	6,024	6,024	6,024	6,024	6,025	6,025	6,025	-
5900 Communications	-	17	147	87	87	446	1,820	2,730	2,342	1,408	2,075	2,139	-
5901 Postage and Shipping	229	(226)	184	130	367	1,185	227	155	-	3	96	64	-
	1,729	11,126	6,359	6,241	6,478	7,654	8,072	8,909	8,366	13,036	8,196	8,227	-

#### Facilities, Repairs and Other Leases

5610 Repairs and Maintenance	-	-	-	-	-	-	463	-	-	-	-	-	-
	-	-	-	-	-	-	463	-	-	-	-	-	-

#### Professional/Consulting Services

5801 IT	-	-	-	-	-	-	-	-	-	-	-	-	-
5802 Audit & Taxes	-	-	-	-	-	4,095	-	-	-	4,095	-	-	-
5803 Legal	-	3,284	187	2,173	3,523	2,664	1,516	8,255	6,075	2,452	5,594	4,707	-
5804 Professional Development	-	-	3,406	6,475	600	13,534	3,452	894	6,350	398	2,547	3,098	-
5805 General Consulting	-	-	-	750	150	1,050	313	1,500	1,650	(1,475)	558	244	-
5806 Special Activities/Field Trips	-	-	-	-	988	1,056	4,832	2,966	-	1,646	-	-	-
5807 Bank Charges	465	697	514	758	858	880	623	582	571	564	572	569	-
5808 Printing	-	-	-	-	-	-	-	-	5	-	-	-	-
5809 Other taxes and fees	-	139	2	(0)	-	-	-	-	-	1,847	-	-	-
5810 Payroll Service Fee	-	907	215	215	767	811	562	786	554	633	290	290	-

Annual Forecast	Original Budget Total	Favorable / (Unfav.)
	ADA = 434.25	
3,756,000	3,756,001	(0)
86,850	86,850	-
(592)	-	(592)
143,386	143,386	-
3,985,644	3,986,237	(593)
52,653	51,676	977
202,552	-	202,552
255,205	51,676	203,529
263,264	260,550	2,714
8,238	-	8,238
86,416	86,416	-
1,548	-	1,548
33,972	-	33,972
393,438	346,966	46,472
10,654	-	10,654
10,654	-	10,654
4,644,941	4,384,878	260,063
1,235,304	1,126,517	(108,787)
76,394	61,200	(15,194)
207,074	245,500	38,426
307,610	287,000	(20,610)
1,826,382	1,720,217	(106,165)
118,969	132,438	13,469
118,969	132,438	13,469
284,731	316,520	31,788
6,851	8,211	1,360
26,927	26,863	(63)
222,135	187,500	(34,635)
10,346	14,210	3,864
23,302	25,937	2,635
13,147	-	(13,147)
587,440	579,242	(8,199)
649,049	301,849	(347,200)
76,940	41,700	(35,240)
1,826	4,400	2,574
60,678	43,121	(17,557)
788,493	391,770	(396,723)
173,141	110,200	(62,941)
211,371	587,148	375,777
235,150	221,984	(13,166)
619,662	919,333	299,671
-	8,400	8,400
6,390	900	(5,490)
72,291	18,000	(54,291)
13,297	1,500	(11,797)
2,415	1,300	(1,115)
94,393	30,100	(64,293)
463	-	(463)
463	3,200	2,737
-	700	700
8,190	-	(8,190)
40,429	4,800	(35,629)
40,754	3,100	(37,654)
4,740	1,900	(2,840)
11,489	86,243	74,753
7,654	115	(7,539)
5	115	110
1,98		



**Lake View Charter School**

**Budget vs Actual**

For the period ended April 30, 2021

	Current Period Actual	Current Period Budget	Current Period Variance	YTD Actual	YTD Budget	YTD Budget Variance	Total Budget
<b>Revenues</b>							
State Aid - Revenue Limit							
LCFF State Aid	\$ 86,242	\$ 101,412	\$ (15,170)	\$ 2,328,160	\$ 2,336,233	\$ (8,073)	\$ 3,756,001
Education Protection Account	21,701	21,713	(12)	65,126	65,138	(12)	86,850
State Aid - Prior Year	35	-	35	(592)	-	(592)	-
In Lieu of Property Taxes	10,324	10,552	(228)	114,135	111,730	2,405	143,386
Total State Aid - Revenue Limit	118,302	133,676	(15,374)	2,506,829	2,513,101	(6,272)	3,986,237
Federal Revenue							
Special Education - Entitlement	-	4,862	(4,862)	-	37,090	(37,090)	51,676
Other Federal Revenue	-	-	-	27,675	-	27,675	-
Total Federal Revenue	-	4,862	(4,862)	27,675	37,090	(9,415)	51,676
Other State Revenue							
State Special Education	5,634	24,514	(18,880)	172,355	187,008	(14,653)	260,550
Mandated Cost	-	-	-	8,238	-	8,238	-
State Lottery	24,102	20,801	3,301	48,817	41,603	7,214	86,416
Prior Year Revenue	-	-	-	1,548	-	1,548	-
Other State Revenue	-	-	-	33,972	-	33,972	-
Total Other State Revenue	29,736	45,316	(15,579)	264,930	228,611	36,319	346,966
Other Local Revenue							
Contributions, Unrestricted	-	-	-	10,654	-	10,654	-
Total Other Local Revenue	-	-	-	10,654	-	10,654	-
<b>Total Revenues</b>	<b>\$ 148,038</b>	<b>\$ 183,854</b>	<b>\$ (35,816)</b>	<b>\$ 2,810,088</b>	<b>\$ 2,778,801</b>	<b>\$ 31,286</b>	<b>\$ 4,384,878</b>
<b>Expenses</b>							
Certificated Salaries							
Teachers' Salaries	\$ 102,908	\$ 93,876	\$ (9,031)	\$ 1,033,538	\$ 938,764	\$ (94,774)	\$ 1,126,517
Teachers' Extra Duty/Stipends	6,996	5,100	(1,896)	62,228	51,000	(11,228)	61,200
Pupil Support Salaries	14,297	20,458	6,162	178,481	204,583	26,103	245,500
Administrators' Salaries	25,697	23,917	(1,780)	256,217	239,167	(17,050)	287,000
Total Certificated Salaries	149,897	143,351	(6,546)	1,530,463	1,433,514	(96,949)	1,720,217
Classified Salaries							
Other Classified Salaries	4,436	11,037	6,600	109,293	110,365	1,072	132,438
Total Classified Salaries	4,436	11,037	6,600	109,293	110,365	1,072	132,438
Benefits							
State Teachers' Retirement System, certificated positions	23,707	26,377	2,670	240,496	263,767	23,271	316,520
OASDI/Medicare/Alternative, certificated positions	269	684	416	6,558	6,843	285	8,211
Medicare/Alternative, certificated positions	2,133	2,239	106	22,750	22,386	(364)	26,863
Health and Welfare Benefits, certificated positions	17,595	15,625	(1,970)	193,385	156,250	(37,135)	187,500
State Unemployment Insurance, certificated positions	196	711	515	9,023	12,789	3,766	14,210
Workers' Compensation Insurance, certificated positions	1,977	2,161	184	19,270	21,614	2,344	25,937
Other Benefits, certificated positions	14,157	-	(14,157)	13,147	-	(13,147)	-
Total Benefits	60,033	47,796	(12,236)	504,630	483,649	(20,981)	579,242
Books & Supplies							
School Supplies	85,876	32,979	(52,897)	540,874	275,460	(265,414)	301,849
Software	12,737	3,475	(9,262)	69,989	34,750	(35,239)	41,700
Office Expense	-	367	367	1,827	3,667	1,839	4,400
Business Meals	-	58	58	-	583	583	700
Noncapitalized Equipment	10,402	4,711	(5,691)	60,678	39,351	(21,327)	43,121
Total Books & Supplies	109,016	41,591	(67,425)	673,368	353,811	(319,557)	391,770
Subagreement Services							
Special Education	6,125	9,183	3,059	154,774	91,833	(62,941)	110,200
Other Educational Consultants	33,226	64,150	30,924	174,614	535,816	361,202	587,148
Instructional Services	18,499	18,499	(0)	184,989	184,987	(2)	221,984
Total Subagreement Services	57,850	91,832	33,983	514,378	812,637	298,259	919,333
Operations & Housekeeping							
Auto and Travel	-	700	700	-	7,000	7,000	8,400
Dues & Memberships	5,600	75	(5,525)	6,390	750	(5,640)	900
Insurance	6,025	1,500	(4,525)	60,241	15,000	(45,241)	18,000
Communications	1,408	125	(1,283)	9,083	1,250	(7,833)	1,500
Postage and Shipping	3	108	106	2,255	1,083	(1,172)	1,300
Total Operations & Housekeeping	13,036	2,508	(10,527)	77,969	25,083	(52,886)	30,100
Facilities, Repairs & Other Leases							
Other Leases	-	267	267	-	2,667	2,667	3,200
Repairs and Maintenance	-	-	-	463	-	(463)	-
Total Facilities, Repairs & Other Leases	-	267	267	463	2,667	2,204	3,200
Professional/Consulting Services							
IT	-	58	58	-	583	583	700
Audit & Taxes	4,095	-	(4,095)	8,190	-	(8,190)	-
Legal	2,452	400	(2,052)	30,128	4,000	(26,128)	4,800
Professional Development	398	258	(140)	35,108	2,583	(32,525)	3,100
General Consulting	(1,475)	158	1,634	3,937	1,583	(2,354)	1,900
Special Activities/Field Trips	1,646	9,423	7,776	11,489	78,703	67,214	86,243
Bank Charges	564	10	(554)	6,512	95	(6,417)	115
Printing	-	10	10	5	95	90	115
Other Taxes and Fees	1,847	730	(1,117)	1,988	6,935	4,947	8,395
Payroll Service Fee	633	311	(322)	5,448	3,112	(2,337)	3,734
Management Fee	24,760	24,893	133	251,297	248,933	(2,364)	298,720
District Oversight Fee	6,644	2,674	(3,970)	66,438	50,262	(16,176)	79,725
Public Relations/Recruitment	-	125	125	-	1,250	1,250	1,500
Total Professional/Consulting Services	41,564	39,051	(2,513)	420,541	398,134	(22,407)	489,046
Interest							
Interest Expense	6,021	-	(6,021)	72,574	76,059	3,485	94,219
Total Interest	6,021	-	(6,021)	72,574	76,059	3,485	94,219
<b>Total Expenses</b>	<b>\$ 441,852</b>	<b>\$ 377,433</b>	<b>\$ (64,419)</b>	<b>\$ 3,903,679</b>	<b>\$ 3,695,919</b>	<b>\$ (207,760)</b>	<b>\$ 4,359,564</b>
<b>Change in Net Assets</b>	<b>(293,814)</b>	<b>(193,579)</b>	<b>(100,235)</b>	<b>(1,093,592)</b>	<b>(917,118)</b>	<b>(176,474)</b>	<b>25,314</b>
Net Assets, Beginning of Period	(577,913)			221,864			
<b>Net Assets, End of Period</b>	<b>\$ (871,728)</b>			<b>\$ (871,728)</b>			

## Lake View Charter School

### Statement of Financial Position

April 30, 2021

	Current Balance	Beginning Year Balance	YTD Change	YTD % Change
<b>Assets</b>				
<b>Current Assets</b>				
Cash & Cash Equivalents	\$ 342,463	\$ 296,089	\$ 46,374	16%
Accounts Receivable	5,408	16,465	(11,057)	-67%
Public Funding Receivable	7,246	919,717	(912,470)	-99%
Factored Receivable	(1,257,411)	(295,400)	(962,011)	326%
Due To/From Related Parties	260,901	263,659	(2,758)	-1%
Prepaid Expenses	47,916	(105,093)	153,009	-146%
<b>Total Current Assets</b>	<b>(593,477)</b>	<b>1,095,437</b>	<b>(1,688,913)</b>	<b>-154%</b>
<b>Long-Term Assets</b>				
Deposits	75,000	-	75,000	0%
<b>Total Long Term Assets</b>	<b>75,000</b>	<b>-</b>	<b>75,000</b>	<b>0%</b>
<b>Total Assets</b>	<b>\$ (518,477)</b>	<b>\$ 1,095,437</b>	<b>\$ (1,613,913)</b>	<b>-147%</b>
<b>Liabilities</b>				
<b>Current Liabilities</b>				
Accounts Payable	\$ 37,405	\$ 607,505	\$ (570,100)	-94%
Accrued Liabilities	140,240	266,067	(125,828)	-47%
Notes Payable, Current Portion	17,488	-	17,488	0%
<b>Total Current Liabilities</b>	<b>195,133</b>	<b>873,572</b>	<b>(678,439)</b>	<b>-78%</b>
<b>Long-Term Liabilities</b>				
Notes Payable, Net of Current Portion	158,118	-	158,118	0%
<b>Total Long-Term Liabilities</b>	<b>158,118</b>	<b>-</b>	<b>158,118</b>	<b>0%</b>
<b>Total Liabilities</b>	<b>353,251</b>	<b>873,572</b>	<b>(520,322)</b>	<b>-60%</b>
<b>Net Assets</b>	<b>(871,728)</b>	<b>221,864</b>	<b>(1,093,592)</b>	<b>-493%</b>
<b>Total Liabilities and Net Assets</b>	<b>\$ (518,477)</b>	<b>\$ 1,095,437</b>	<b>\$ (1,613,913)</b>	<b>-147%</b>

## Lake View Charter School

### Statement of Cash Flows

For the period ended April 30, 2021

	Month Ended 04/30/21	YTD Ended 04/30/21
<b>Cash Flows from Operating Activities</b>		
Changes in Net Assets	\$ (293,814)	\$ (1,093,592)
Adjustments to reconcile change in net assets to net cash flows from operating activities:		
Decrease/(Increase) in Operating Assets:		
Public Funding Receivable	-	912,470
Grants, Contributions & Pledges Receivable	245,312	973,068
Due from Related Parties	-	2,758
Prepaid Expenses	8,799	(153,009)
Other Assets	-	(75,000)
(Decrease)/Increase in Operating Liabilities:		
Accounts Payable	3,761	(570,100)
Accrued Expenses	(7,331)	(125,828)
Deferred Revenue	-	-
<b>Total Cash Flows from Operating Activities</b>	<b>(43,272)</b>	<b>(129,232)</b>
 <b>Cash Flows from Financing Activities</b>		
Proceeds from (payments on) Long-Term Debt	146	175,606
<b>Total Cash Flows from Financing Activities</b>	<b>146</b>	<b>175,606</b>
 Change in Cash & Cash Equivalents	(43,127)	46,374
Cash & Cash Equivalents, Beginning of Period	385,589	296,089
 <b>Cash and Cash Equivalents, End of Period</b>	<b>\$ 342,463</b>	<b>\$ 342,463</b>

## Lake View Charter School

## Check Register

For the period ended April 30, 2021

Check Number	Vendor Name	Check Date	Check Amount
10843	The Wright Keys Music Academy	4/22/2021	VOID
11006	All About Learning Press, Inc.	4/7/2021	\$ 513.55
11007	Apollo Academy of Music	4/7/2021	540.00
11008	BookShark	4/7/2021	350.45
11009	CB Music Studios	4/7/2021	109.00
11010	Charter Impact, Inc.	4/7/2021	6,262.00
11011	Chico Art School	4/7/2021	175.00
11012	E-Therapy, LLC	4/7/2021	343.00
11013	Educational Development Corporation	4/7/2021	22.99
11014	Glad Donahue	4/7/2021	150.00
11015	Great Waters Press	4/7/2021	28.62
11016	Jessica Coombs	4/7/2021	150.00
11017	KiwiCo, Inc	4/7/2021	2,212.75
11018	Learning A-Z	4/7/2021	118.00
11019	Learning Without Tears	4/7/2021	103.12
11020	LetMe! Technologies	4/7/2021	110.00
11021	Lindsay Mower	4/7/2021	150.00
11022	Little Passports	4/7/2021	160.55
11023	Moving Beyond the Page	4/7/2021	35.39
11024	Oak Meadow Inc.	4/7/2021	140.00
11025	Peace Hill Press, Inc. dba Well Trained Mind Press	4/7/2021	48.70
11026	Procopio, Cory, Hargreaves & Savitch LLP	4/7/2021	886.60
11027	Provenance	4/7/2021	74,972.25
11028	Rainbow Resource Center	4/7/2021	1,016.46
11029	Reading For Life	4/7/2021	1,490.00
11030	Shane Cammell	4/7/2021	292.00
11031	Singapore Math, Inc.	4/7/2021	197.09
11032	Teaching Textbooks	4/7/2021	75.45
11033	The Cottonwood School	4/7/2021	2,068.81
11034	Think Outside, LLC	4/7/2021	153.80
11035	Thrive Homeschool Program	4/7/2021	825.00
11036	Tiffany Ridenour, Art	4/7/2021	720.00
11037	Verizon Wireless	4/7/2021	1,254.75
11038	Association of California School Administrator	4/12/2021	115.24
11039	CharterSafe	4/14/2021	16,002.00
11040	All About Learning Press, Inc.	4/14/2021	159.90
11041	Apollo Academy of Music	4/14/2021	240.00
11042	Barbara J Rice	4/14/2021	845.00
11043	BookShark	4/14/2021	141.57
11044	Charter Impact, Inc.	4/14/2021	206.50
11045	Educational Development Corporation	4/14/2021	458.87
11046	Enid Music	4/14/2021	106.00
11047	History Unboxed LLC	4/14/2021	66.10
11048	Institute for Excellence in Writing	4/14/2021	338.10
11049	Joshua Hegg	4/14/2021	450.00
11050	KiwiCo, Inc	4/14/2021	424.47
11051	Learning Without Tears	4/14/2021	130.85
11052	Math-U-See Inc.	4/14/2021	177.00
11053	Moving Beyond the Page	4/14/2021	89.24
11054	Oak Meadow Inc.	4/14/2021	835.00
11055	Provenance	4/14/2021	275.00
11056	Rainbow Resource Center	4/14/2021	1,850.75
11057	Rainwater Music Company	4/14/2021	352.00
11058	Reading For Life	4/14/2021	520.00
11059	Singapore Math, Inc.	4/14/2021	67.36
11060	Starfall Education Foundation	4/14/2021	93.30

## Lake View Charter School

## Check Register

For the period ended April 30, 2021

Check Number	Vendor Name	Check Date	Check Amount
11061	Teacher Synergy, LLC	4/14/2021	3.00
11062	Teaching Textbooks	4/14/2021	98.16
11063	Think Outside, LLC	4/14/2021	153.80
11064	Thrive Homeschool Program	4/14/2021	2,305.00
11065	8x8 Inc.	4/20/2021	87.57
11066	A Brighter Child, Inc	4/20/2021	870.00
11067	Activities for Learning Inc.	4/20/2021	99.83
11068	All About Learning Press, Inc.	4/20/2021	159.90
11069	Apollo Academy of Music	4/20/2021	1,280.00
11070	Charter Schools Development Center	4/20/2021	398.00
11071	Drew's Art Box LLC	4/20/2021	35.00
11072	Earthbound Skills	4/20/2021	6,156.05
11073	Homeschool Spanish Academy	4/20/2021	1,046.00
11074	KiwiCo, Inc	4/20/2021	1,948.20
11075	Law Offices of Young Minney & Corr LLP	4/20/2021	2,451.87
11076	Monarch River Academy	4/20/2021	3,456.42
11077	Provenance	4/20/2021	6,997.90
11078	Rainbow Resource Center	4/20/2021	1,226.93
11079	Rainwater Music Company	4/20/2021	154.00
11080	School Pathways, LLC	4/20/2021	1,931.78
11081	Shane Cammell	4/20/2021	327.00
11082	StaffRehab LLC	4/20/2021	174.00
11083	Teaching Textbooks	4/20/2021	55.45
11084	Time4Learning	4/20/2021	439.20
11085	Verizon Wireless	4/20/2021	820.37
11086	The Wright Keys Music Academy	4/23/2021	1,000.00
11087	Charter Impact, Inc.	4/27/2021	426.50
11088	Clarksville Charter School	4/27/2021	3,937.10
11089	Eat2Explore	4/27/2021	429.15
11090	Educational Development Corporation	4/27/2021	21.98
11091	Provenance	4/27/2021	1,241.68
11092	Teaching Textbooks	4/27/2021	43.08
11093	The Cottonwood School	4/27/2021	19.66
11094	Think Outside, LLC	4/27/2021	1,538.00
11095	Winship Community School	4/27/2021	7,359.74
11096	Sequoia Grove Charter Alliance	4/30/2021	5,000.00

Total Disbursements issued in April \$ 173,311.90



Lake View Charter School

Accounts Payable Aging

April 30, 2021

Vendor Name	Invoice/Credit Number	Invoice Date	Date Due	Current	1 - 30 Days Past Due	31 - 60 Days Past Due	61 - 90 Days Past Due	Over 90 Days Past Due	Total
4EEE	SB21-001	4/21/2021	5/21/2021	\$ 650.00	\$ -	\$ -	\$ -	\$ -	\$ 650.00
A Brighter Child, Inc	56508	4/12/2021	5/12/2021	225.00	-	-	-	-	225.00
Accrediting Commission for Schools	1305936	3/31/2021	4/30/2021	600.00	-	-	-	-	600.00
Activities for Learning Inc.	382929	4/14/2021	5/14/2021	99.83	-	-	-	-	99.83
Activities for Learning Inc.	382930	4/14/2021	5/14/2021	330.28	-	-	-	-	330.28
Apollo Academy of Music	868	3/19/2021	4/18/2021	120.00	-	-	-	-	120.00
Billie Adkins	ADKI041421	4/14/2021	4/14/2021	150.00	-	-	-	-	150.00
CB Music Studios	16834	4/20/2021	5/20/2021	109.00	-	-	-	-	109.00
Christy White	16758	4/6/2021	5/6/2021	4,095.00	-	-	-	-	4,095.00
Contra Costa Economic Partnership	301	4/15/2021	4/15/2021	10,300.00	-	-	-	-	10,300.00
Department of Justice	505707	4/5/2021	4/5/2021	130.00	-	-	-	-	130.00
E-Therapy, LLC	18727	4/15/2021	5/15/2021	224.25	-	-	-	-	224.25
Earthbound Skills	0140	4/22/2021	5/22/2021	3,866.31	-	-	-	-	3,866.31
Eat2Explore	100983	4/17/2021	5/17/2021	114.80	-	-	-	-	114.80
Eat2Explore	100984	4/22/2021	5/22/2021	104.80	-	-	-	-	104.80
Enid Music	1844	4/18/2021	5/19/2021	106.00	-	-	-	-	106.00
Glad Donahue	DONA041421	4/14/2021	4/14/2021	150.00	-	-	-	-	150.00
Hands 4 Building, LLC	2405	4/23/2021	5/23/2021	147.99	-	-	-	-	147.99
Hands 4 Building, LLC	2406	4/23/2021	5/23/2021	147.99	-	-	-	-	147.99
Jeanette Wise	8 - revision 2	4/18/2021	5/18/2021	450.00	-	-	-	-	450.00
Jenny Johnston	JOHN041521	4/15/2021	4/15/2021	35.00	-	-	-	-	35.00
Jessica Coombs	COOM041421	4/14/2021	4/14/2021	150.00	-	-	-	-	150.00
Kathryn A Jackson	003-2021-04	4/21/2021	5/21/2021	150.00	-	-	-	-	150.00
KiwiCo, Inc	APR-21-LAKE-1	4/15/2021	5/30/2021	174.60	-	-	-	-	174.60
LEGO Education	1190456110	4/20/2021	6/19/2021	359.13	-	-	-	-	359.13
LetMe! Technologies	ILVC_2103	4/10/2021	5/10/2021	605.00	-	-	-	-	605.00
Lindsay Mower	MOWE041421	4/14/2021	4/14/2021	150.00	-	-	-	-	150.00
Little Passports	115789776	4/15/2021	5/15/2021	314.67	-	-	-	-	314.67
Math-U-See Inc.	0702206-IN	4/7/2021	5/30/2021	116.00	-	-	-	-	116.00
McColgan & Associates Inc	4128	4/14/2021	4/14/2021	2,565.00	-	-	-	-	2,565.00
Moving Beyond the Page	252777	4/15/2021	5/15/2021	64.22	-	-	-	-	64.22
PresenceLearning, Inc.	INV42288	4/6/2021	5/6/2021	2,259.29	-	-	-	-	2,259.29
Provenance	4827	4/12/2021	5/12/2021	100.00	-	-	-	-	100.00
Provenance	4837	4/12/2021	5/12/2021	280.00	-	-	-	-	280.00
Provenance	4923	4/20/2021	5/20/2021	2,738.52	-	-	-	-	2,738.52
Rainbow Resource Center	3365121	4/12/2021	5/12/2021	141.16	-	-	-	-	141.16
Rainbow Resource Center	3365172	4/12/2021	5/12/2021	53.67	-	-	-	-	53.67
Reading For Life	0246	4/14/2021	5/14/2021	727.87	-	-	-	-	727.87
Shane Johnston	JOHN041521	4/15/2021	4/15/2021	35.00	-	-	-	-	35.00
Shooting Stars Tutoring	28	4/19/2021	4/19/2021	1,050.00	-	-	-	-	1,050.00
StaffRehab LLC	M0076444	4/12/2021	5/12/2021	152.25	-	-	-	-	152.25
Starfall Education Foundation	5995-8844-1119	4/12/2021	5/12/2021	8.25	-	-	-	-	8.25
Studies Weekly	387293	4/12/2021	9/1/2021	32.12	-	-	-	-	32.12
Studies Weekly	387360	4/12/2021	9/1/2021	32.12	-	-	-	-	32.12
Teacher Synergy, LLC	152593349	4/26/2021	5/17/2021	6.25	-	-	-	-	6.25
The Wright Keys Music Academy	6544	4/21/2021	5/8/2021	1,020.00	-	-	-	-	1,020.00

**Lake View Charter School**

**Accounts Payable Aging**

April 30, 2021

Vendor Name	Invoice/Credit Number	Invoice Date	Date Due	Current	1 - 30 Days Past Due	31 - 60 Days Past Due	61 - 90 Days Past Due	Over 90 Days Past Due	Total
Tiffany Ridenour, Art	27	4/23/2021	5/23/2021	1,600.00	-	-	-	-	1,600.00
Timberdoodle.com	358244	3/25/2021	4/24/2021	42.57	-	-	-	-	42.57
Timberdoodle.com	359684	4/13/2021	5/13/2021	21.43	-	-	-	-	21.43
Tori Gillam	000407	4/20/2021	4/20/2021	300.00	-	-	-	-	300.00
<b>Total Outstanding Payables in April</b>				<b>\$ 37,405.37</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 37,405.37</b>

## Lake View Charter School

### *Due (To)/From All Inspire Charter School Locations*

For the period ended April 30, 2021

	<b>Account Balance</b>
Due (to)/from Inspire Charter Services	\$ 260,901
<b>Total Due (to)/from Balance</b>	<b><u>\$ 260,901</u></b>

# Coversheet

## Expanded Learning Opportunities (ELO) Grant Plan

**Section:** II. Finance  
**Item:** B. Expanded Learning Opportunities (ELO) Grant Plan  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** ELO Grant LVCS 2021-protected.pdf

### BACKGROUND:

The following is the local educational agency's (LEA's) plan for providing supplemental instruction and support to students, including those identified as needing academic, social-emotional, and other supports, including the provision of meals and snacks. The plan will explain how the LEA will use the funds it receives through the Expanded Learning Opportunities (ELO) Grant to implement a learning recovery program for at least the students included in one or more of the following groups: low-income students, English learners, foster youth, homeless students, students with disabilities, students at risk of abuse, neglect, or exploitation, disengaged students, and students who are below grade level, including, but not limited to, those who did not enroll in kindergarten in the 2020–21 school year, credit-deficient students, high school students at risk of not graduating, and other students identified by certificated staff.

### RECOMMENDATION:

Recommended for approval.

California Department of Education  
March 2021

## Expanded Learning Opportunities Grant Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Lake View Charter School	Julie Haycock-Cavendar, Executive Director	<a href="mailto:Julie.haycock@lakeviewcharter.org">Julie.haycock@lakeviewcharter.org</a> , 916.241.8667

The following is the local educational agency's (LEA's) plan for providing supplemental instruction and support to students, including those identified as needing academic, social-emotional, and other supports, including the provision of meals and snacks. The plan will explain how the LEA will use the funds it receives through the Expanded Learning Opportunities (ELO) Grant to implement a learning recovery program for at least the students included in one or more of the following groups: low-income students, English learners, foster youth, homeless students, students with disabilities, students at risk of abuse, neglect, or exploitation, disengaged students, and students who are below grade level, including, but not limited to, those who did not enroll in kindergarten in the 2020–21 school year, credit-deficient students, high school students at risk of not graduating, and other students identified by certificated staff.

For specific requirements please refer to the Expanded Learning Opportunities Grant Plan Instructions.

### Plan Descriptions

A description of how parents, teachers, and school staff were involved in the development of the plan.

Before developing the process of ELO Grant Plan, our school initially conducted several meetings with different departments within our school. We began this process by gaining insight and perspective to what our teachers and staff felt our areas of focus should be within each department. We also sent our surveys to our community, staff, parents, and students in order to receive feedback regarding what they feel our school strategies, policies, and areas of focus within academic and social-emotional wellness should include for implementation. The surveys we received from our stakeholders were analyzed thoroughly in order to gain insight on what overarching supplemental instruction and support strategies should be for our school and within those goals how we can create actions to meet the needs of our community.

A description of how students will be identified and the needs of students will be assessed.

Internal benchmark diagnostic assessment data gathered from a computerized adaptable test, taken each fall and spring, for grades TK-12, pinpoints the proficiency level of students across a range of subjects. The benchmark diagnostic assessments are specifically

designed to provide meaningful information for gauging student progress toward mastery of the skills measured by the summative assessments. Grades 3-12 in the Winter will also take an interim benchmark assessment. This data along with learning styles are used to build the individualized learning path for each student to target specific learning objectives and standards. Students will be identified from their prior year benchmark assessment data and the fall benchmark assessment to address areas of academic need. Teacher and parent referral (based upon academic need with grade level work and prior benchmark assessments), ELPAC results, 504 and IEP's are also examples of ways the school will identify student need.

A description of how parents and guardians of students will be informed of the opportunities for supplemental instruction and support.

Parents and guardians of students will be informed within established communication avenues between the school and families. For example, communication will be presented in a weekly newsletter, social media, school's website, general information at Governing Board meetings, and if needed, translated into languages other than English. Our communication will be presented to be read and understood to our stakeholders with contact information ,if questions arise.

A description of the LEA's plan to provide supplemental instruction and support.

LVCS plan's to provide supplemental instruction and support for our students in a variety of ways. A focus on in-person support with expanded learning sessions with an emphasis on academics, health, and social-emotional wellness. Our students will have a small group and 1:1 intervention to address learning loss. Our small group/1:1 will be focused mainly on supporting language arts and math. LVCS will purchase curriculum and support that will maximize staff efforts to support all students including those in a tutoring, small group, or 1:1. The ability for our students to access curriculum with technology/internet access proves to be a continued support for students in the 21<sup>st</sup> Century. Professional Development and Conferences will also be a focus for staff to continue to learn as educators how to support learning loss and the social emotional wellbeing of themselves and their students.

## Expenditure Plan

The following table provides the LEA's expenditure plan for how it will use ELO Grant funds to support the supplemental instruction and support strategies being implemented by the LEA.

Supplemental Instruction and Support Strategies	Planned Expenditures	Actual Expenditures
Extending instructional learning time	\$ 59,200	[Actual expenditures will be provided when available]
Accelerating progress to close learning gaps through the implementation, expansion, or enhancement of learning supports	\$ 151,998	[Actual expenditures will be provided when available]
Integrated student supports to address other barriers to learning	\$ 28,700	[Actual expenditures will be provided when available]

Community learning hubs that provide students with access to technology, high-speed internet, and other academic supports	\$ 0.00	[Actual expenditures will be provided when available]
Supports for credit deficient students to complete graduation or grade promotion requirements and to increase or improve students' college eligibility	\$ 32,000	[Actual expenditures will be provided when available]
Additional academic services for students	\$ 0.00	[Actual expenditures will be provided when available]
Training for school staff on strategies to engage students and families in addressing students' social-emotional health and academic needs	\$ 10,000	[Actual expenditures will be provided when available]
Total Funds to implement the Strategies	\$ 281,898	[Actual expenditures will be provided when available]

A description of how ELO Grant funds are being coordinated with other federal Elementary and Secondary School Emergency Relief Funds received by the LEA.

The ELO Grant plan was created as a collaborative process with our LCP, 21-22 LCAP, ESSER, and other emergency relief funds. The actions within the ELO support the LCAP goals and actions by expanding on the existing supports and services. The ELO actions also support the staffing and technology needs in order to support the implementation of expanded learning opportunities for students.

# Coversheet

## Discussion and Potential Action on Executive Director Compensation Study

**Section:** II. Finance  
**Item:** C. Discussion and Potential Action on Executive Director Compensation  
Study  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** ED Salary Comparisons KD.pdf

**BACKGROUND:**

Analysis of other local NCB charter school Executive Director salaries

**RECOMMENDATION:**

Approval of Executive Director salary for Lake View Charter School





### High School Districts

Statewide Averages	Small ADA <1,000	Medium ADA 1,000 to 3,999	Large ADA ≥4,000
Beginning Teacher Annual Salary	\$47,811	\$49,328	\$52,670
Midrange Teacher Annual Salary	\$66,135	\$75,987	\$89,660
Highest Teacher Annual Salary	\$91,275	\$99,665	\$112,761
School-Site Principal Annual Salary (Middle)	N/A	\$140,227	\$142,638
School-Site Principal Annual Salary (High)	\$125,317	\$136,386	\$158,074
District Superintendent Annual Salary	\$138,667	\$183,166	\$250,285
Percentage Allocated for Administrative Salaries	5.36%	5.60%	4.54%
Percentage Allocated for Teacher Salaries	25.30%	29.97%	31.63%

### Proposal of Executive Director Salaries

1	2	3	4	5	6	7	8	9	10
\$175,000	\$175,000	\$180,000	\$180,000	\$185,000	\$185,000	\$190,000	\$190,000	\$195,000	\$195,000

### Educational Stipends

Doctorate Degree	\$5000
National Board Certification	\$2500

\*Annual salary is based on 225 work days. The 225 work days is a minimum number of work days, and team members may need to work additional days beyond the work calendar

\*Annual Salary advancement for longevity are not guaranteed and are subject to the school's operational needs and/or budget approved by the Board.

\*Board may consider past experience when determining initial placement and promotion

# Coversheet

## Stipend Chart

**Section:** II. Finance  
**Item:** D. Stipend Chart  
**Purpose:** Vote  
**Submitted by:** Jenell Sherman  
**Related Material:** Stipends Titles.pdf

**BACKGROUND:**  
Stipends for 21-22

**RECOMMENDATION:**  
Recommendation for Board Approval

Extra Duty Stipend Title	Stipend Amount	Stipend Description Uploaded
Extra Student Stipend	\$100/month/student over required roster limit	Provided to HSTs carrying over the full time caseload of 28. Caseload pulled on 15th and last day of every month
National Honor Society/National Junior Honor Society	\$1,000.00	Assigned position: HST who partners with NHS/NHJS to support program for students who qualify or will qualify for program.
Academic Decathlon Teacher	\$ 2,500.00	Assigned Position: Provided to credentialed teachers who meet with students to determine if they are meeting academic decathlon course requirements
Military Cadet Core Class	\$5000/semester	Teacher a 2 day/week class for high schoolers through HSVA, Teach a 1 day/week class for younger students through the Adventure Academy, Run 1 Friday/month in person drill activity, Attend all Ca Cadet Corps training, including a one week, in-person camp in July, Coordinate with military personnel as needed to promote the program.
New Teacher Mentor Teachers	\$500/teacher/semester	Assigned Position: paid to a designated HST who applied and received the position to help mentor new teachers.
Extended School Year (ESY)	\$ 3,500.00	Paid to special education teachers who provide services from the end of the academic school year to approximately July 15th
California Healthy Youth Act Coach	\$ 2,500.00	Assigned Position: given to HST who is committed to supporting the CHYA program and holding office hours for students.
Foster/Homeless/Community Liaison	\$ 5,000.00	Assigned Position: HST who works with county and school to identify and support foster youth students. Carry a caseload of 24 students, can carry additional 7 or more with director approval.
Handbook Specialist	\$1000- summer start up, \$2000/year	Assigned Position: HST who creates, organizes and keeps HST handbook up to date
EL Designee	\$5000-10,000	Assigned Position: HST who works with EL coordinator to provide EL support to families and staff. Carry a caseload of 18 students, can carry additional 7 or more with director approval.
ELPAC Testing Stipend	\$250 - \$750	This stipend is for HSTs that went above and beyond their normal job duties to assist with the completion of ELPAC testing. Duties included, but were not limited to: Completion of grade-level Moodle training, Training on the new remote test administration tools, Training on the new remote test administration tools, Communicating with families to set up test sessions, Coordination with HST of testing schedule and rescheduling, Coordination with families regarding the technical requirements needed to successfully complete the test, Time spent testing (average of 40 students total per teacher)
Diversity and Inclusion Advisor	\$3,500	The MDIP (Multicultural Diversity and Inclusion Perspectives) advisor is committed to leading the team highlighting diversity amongst people and cultures in our nation, lifting the voices of those who may not have historically been recognized or valued, and providing diverse perspectives on both historical and current events. desire to help students develop their critical thinking skills by teaching them how to think and not what to think, while providing the tools to help them celebrate the diversity of culture and thought within our country. Within this framework our objective is to create opportunities for conversation and understanding as well as supply tools to help staff and families take actionable steps towards positive change. MDIP advisor plans events, activities and runs book clubs for staff and families.
Extra Student Stipend	\$100/month/student over required roster limit	Provided to each teacher that agrees to handle additional students over their roster limits



# Coversheet

## Extra Duty Stipend Contract

**Section:** II. Finance  
**Item:** E. Extra Duty Stipend Contract  
**Purpose:** Vote  
**Submitted by:** Julie Haycock-Cavender  
**Related Material:** extra duty stipend contract.pdf

**BACKGROUND:**

This contract outlines the responsibilities for extra duty stipend positions

**RECOMMENDATION:**

Board Approval

**\_\_\_\_\_ Charter School  
Extra Duty Stipend, TITLE**

**AGREEMENT FOR THE 2021/2022 SCHOOL YEAR**

This agreement is between Identified Certificated Staff and the \_\_\_\_\_ Charter School for the 2021/2022 school year.

It is agreed that identified staff may be assigned the following extra duties for TITLE for the 2021/2022 school year only.

- Task/Duty
- Task/Duty
- Task/Duty
- Other duties as may be required

The employee will be paid a flat total yearly stipend amount of \$0.00 divided evenly each pay period starting September through May. This is an annual stipend and is at the need of the Charter. The stipend does not carry past the current school year.

*This stipend position is temporary and will be reevaluated based on need.*

\_\_\_\_\_  
EMPLOYEE

\_\_\_\_\_  
Date

\_\_\_\_\_  
EXECUTIVE DIRECTOR

\_\_\_\_\_  
Date

# Coversheet

## Local Control and Accountability Plan and Budget Overview for Parents

**Section:** III. Academic Excellence  
**Item:** A. Local Control and Accountability Plan and Budget Overview for Parents  
**Purpose:** Discuss  
**Submitted by:** Darcy Belleza  
**Related Material:** BOP LVCS 2021-2022.pdf  
LakeView FINAL LCAP.pdf

### BACKGROUND:

Learning Continuity and Attendance Plan is being presented to the Lake View Governing Board for vote. Staff found a typing error on page 19. Correction reads "The 10.07% to increase or improve services is \$36,731." formerly read "The 10.07% to increase or improve services is \$3,673."

### RECOMMENDATION:

Recommended for approval.



# LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Lake View

CDS Code: 11 62596 0139550

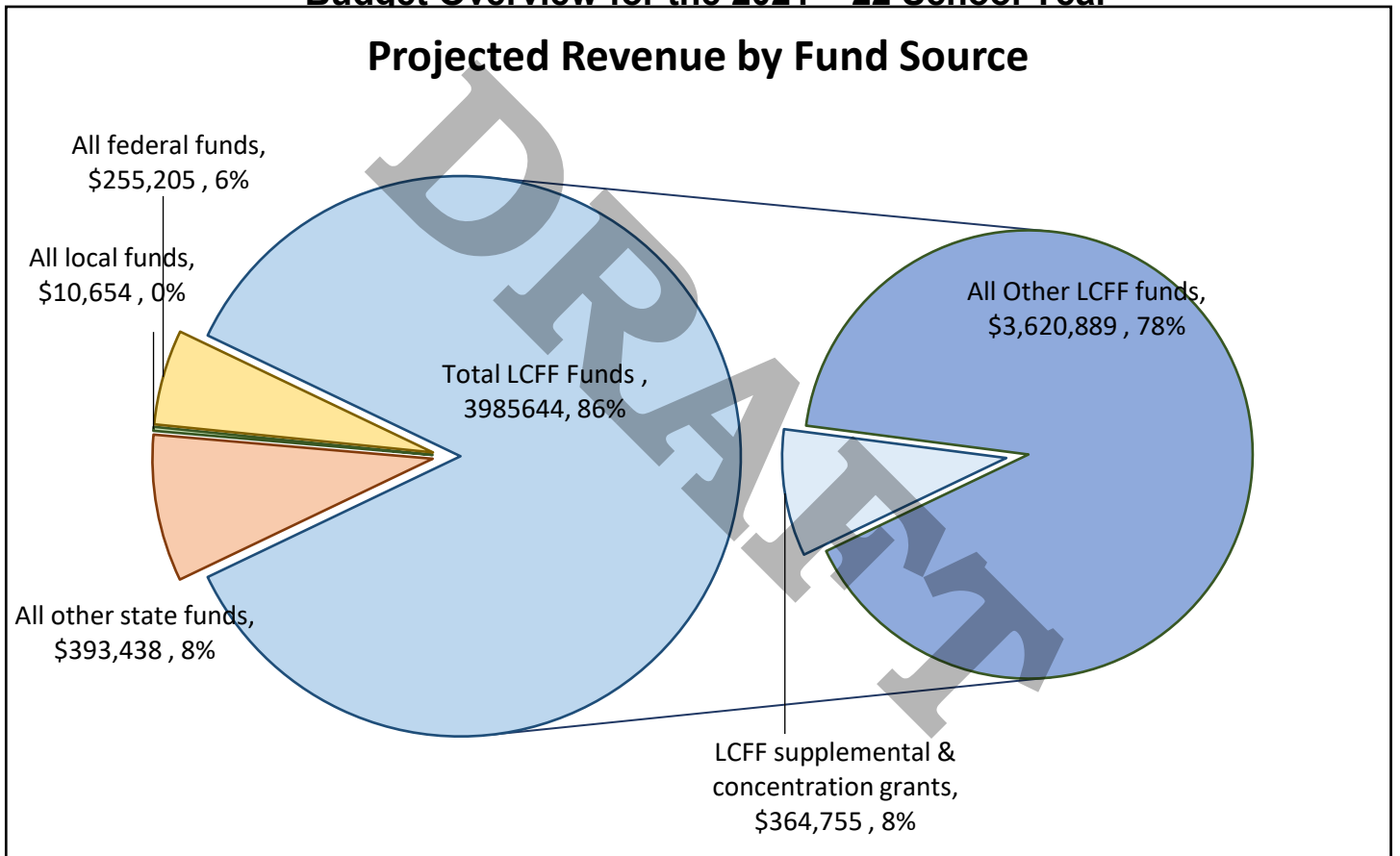
School Year: 2021 – 22

LEA contact information: Julie Haycock

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

## Budget Overview for the 2021 – 22 School Year

### Projected Revenue by Fund Source

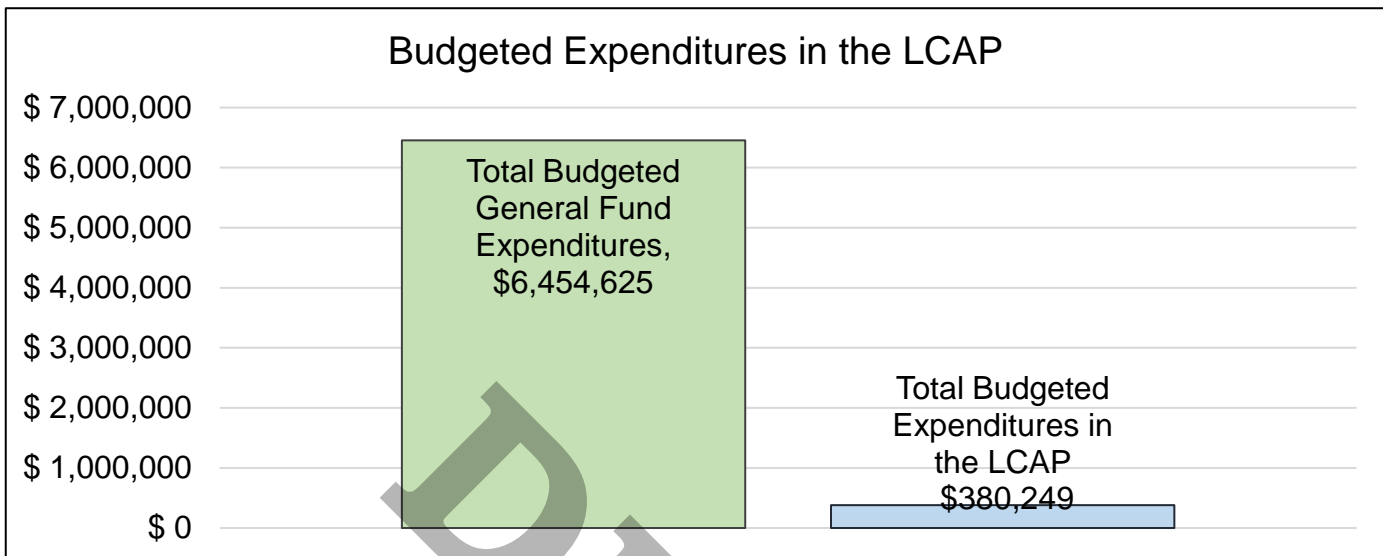


This chart shows the total general purpose revenue Lake View expects to receive in the coming year from all sources.

The total revenue projected for Lake View is \$4,644,941.00, of which \$3,985,644.00 is Local Control Funding Formula (LCFF), \$393,438.00 is other state funds, \$10,654.00 is local funds, and \$255,205.00 is federal funds. Of the \$3,985,644.00 in LCFF Funds, \$364,755.00 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

## LCFF Budget Overview for Parents

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



This chart provides a quick summary of how much Lake View plans to spend for 2021 – 22. It shows how much of the total is tied to planned actions and services in the LCAP.

Lake View plans to spend \$6,454,625.00 for the 2021 – 22 school year. Of that amount, \$380,249.00 is tied to actions/services in the LCAP and \$6,074,376.00 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

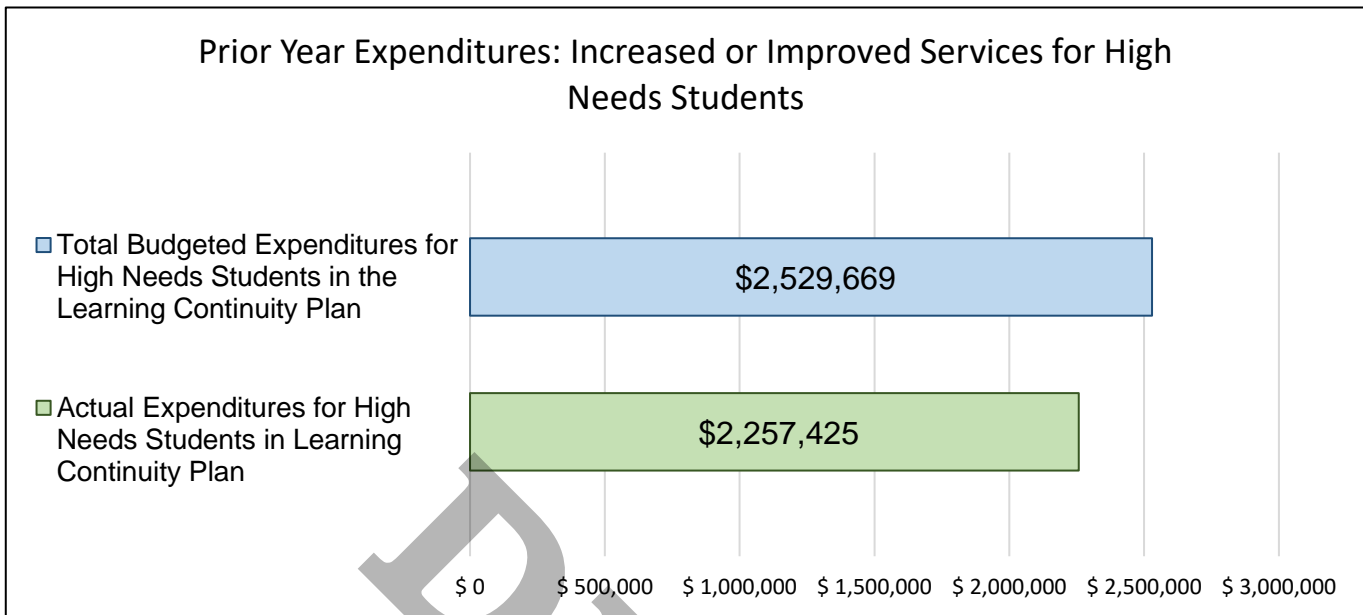
The budgeted expenditures not included in the LCAP will be used for the following: general operating and basic services; all certificated and classified salaries, operational costs such as rent, utilities, and maintenance, and student discretionary budgets for materials/supplies and enrichment classes

### Increased or Improved Services for High Needs Students in the LCAP for the 2021 – 22 School Year

In 2021 – 22, Lake View is projecting it will receive \$364,755.00 based on the enrollment of foster youth, English learner, and low-income students. Lake View must describe how it intends to increase or improve services for high needs students in the LCAP. Lake View plans to spend \$380,249.00 towards meeting this requirement, as described in the LCAP.

# LCFF Budget Overview for Parents

## Update on Increased or Improved Services for High Needs Students in 2020 – 21



This chart compares what Lake View budgeted last year in the Learning Continuity Plan for actions and services that contribute to increasing or improving services for high needs students with what Lake View estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

In 2020 – 21, Lake View's Learning Continuity Plan budgeted \$2,529,669.00 for planned actions to increase or improve services for high needs students. Lake View actually spent \$2,257,425.00 for actions to increase or improve services for high needs students in 2020 – 21. The difference between the budgeted and actual expenditures of \$272,244.00 had the following impact on Lake View's ability to increase or improve services for high needs students:

Due to unforeseen circumstances with the COVID-19 pandemic the total budgeted expenditures for the to increase or improve services for high need students was not all utilized. Given the state with the COVID-19 Pandemic, fortunately there was a wealth of free programs and offerings to support our unduplicated students. There was not an impact to our unduplicated students due to the ability to provide free resources, virtual meetings with teachers, and the utilization of enrichment virtual opportunities to keep our students connected to support mental health.

California Department of Education  
January 2021

# Annual Update for Developing the 2021-22 Local Control and Accountability Plan

## Annual Update for the 2019–20 Local Control and Accountability Plan Year

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Lake View Charter School	Julie Haycock-Cavender Executive Director	julie.haycock@lakeviewcharter.org (916) 241-8667

The following is the local educational agency’s (LEA’s) analysis of its goals, measurable outcomes and actions and services from the

### Goal 1

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

State and/or Local Priorities addressed by this goal:

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

### Annual Measurable Outcomes

Expected	Actual
Percent of teachers appropriately credentialed and assigned.	100% of teachers appropriately credentialed and assigned.

Expected	Actual
Percent of facilities considered safe as demonstrated in the Facilities Inventory (FIT) Report.	LVCS is an independent homeschool and does not have a facility.
Percent of student with access to CA state standards-aligned instructional materials (text and e-text) for all core subject areas.	100% of student with access to CA state standards-aligned instructional materials (text and e-text) for all core subject areas.
Percent of students who have access to a computer.	100% of students who have access to a computer.
Percent of students who have a broad course of study through vendor lobby electives and enrichment opportunities.	100% of students who have a broad course of study through vendor lobby electives and enrichment opportunities.

### Actions / Services

Planned Action/Service	Budgeted Expenditures	Actual Expenditures
Ensure teachers are appropriate credentialed and assigned.	\$1,242,000	\$1,252,630
Staff will meet in monthly PLNs to share and discuss best practices and resources for supporting learning in a virtual environment.	\$10,099	\$11,079
Provide access to broad course of study such as VAPA courses and enrichment opportunities	\$635,550	\$638,241

### Goal Analysis

A description of how funds budgeted for Actions/Services that were not implemented were used to support students, families, teachers, and staff.

All budgeted expenditures for actions and services were implemented and used to support students, families, teachers, and staff.

A description of the successes and challenges in implementing the actions/services to achieve the goal.

LVCS successfully provided high-quality teaching and learning that promoted opportunity for applying knowledge within an independent study/online curriculum structure. The school continued to offer professional development; new curriculum offerings expanded to meet

the needs of the students. With the continued evolution of online learning, the school ensured that each student had access to technology. A continued focus is to ensure that all students have internet access and the ability to utilize technology within their homes.

## Goal 2

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

State and/or Local Priorities addressed by this goal:

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

## Annual Measurable Outcomes

Expected	Actual
CAASPP participation rate will be at least 95%.	Actual measurable outcome is not available due to state assessments not being administered during 2019-20 school year. Star 360 participation rate was used as an alternative measure for this metric. 2019-20 Star participation rate was 85% for Math and 77% for ELA.
The percentage of Inspire students meeting or exceeding standards on CAASPP ELA assessments, including all subgroups.	Actual measurable outcome is not available due to state assessments not being administered during 2019-20 school year. Star 360 assessment scores were used as an alternative measure for this metric. 70% of students scored At/Above benchmark.

Expected	Actual								
The percentage of Inspire students meeting or exceeding standards on CAASPP Mathematics assessments, including all subgroups	Actual measurable outcome is not available due to state assessments not being administered during 2019-20 school year. Star 360 assessment scores were used as an alternative measure for this metric. 67% of students scored At/Above benchmark.								
10% of English Learners will increase one level of proficiency on the English Learner Progress Indicator annually	<p>Actual measurable outcome is not available due to state indicators not being reported on the 2020 California Dashboard. 2019-20 ELPAC scores are used as an alternative measure for this metric.</p> <p>Performance Level Scores</p> <table border="0"> <tr> <td>1</td> <td>0%</td> </tr> <tr> <td>2</td> <td>0%</td> </tr> <tr> <td>3</td> <td>100%</td> </tr> <tr> <td>4</td> <td>0%</td> </tr> </table>	1	0%	2	0%	3	100%	4	0%
1	0%								
2	0%								
3	100%								
4	0%								
At least 10% of EL students will reclassify	0% of EL students reclassified in the 2019-20 school year.								
100% of teachers will engage in >15 hours of curriculum training and CCSS PD during the school year.	100% of teachers will engage in >15 hours of curriculum training and CCSS PD during the school year.								
95% of all students will participate in quarterly interim benchmark assessments to show mastery of standards taught.	<p>ELA- 77%</p> <p>Math-85%</p>								

## Actions / Services

Planned ` Action/Service	Budgeted Expenditures	Actual Expenditures
Administer interim benchmark assessments to identify the standards not yet mastered and prepare for state testing in ELA and Math.	\$132,468	\$133,678
Continue Multi-Tiered Systems of Supports to identify student attendance and academic/social needs, or exceptional needs and to individualize support including online virtual instruction license assignments, and enrichment tutoring services	\$47,500	\$49,320
Provide professional development to help guide and support administrators, counselors, and teachers in addressing the academic needs of ELs and their families including administering ELPAC, identifying ELs, administering language surveys, and coordinating ELD instruction	\$39,837	\$39,437
Targeted Professional Development for teachers to support students who are performing below grade level standard on the Smarter Balance Assessment or STAR360 in ELA and Mathematics	\$0	\$0

## Goal Analysis

A description of how funds budgeted for Actions/Services that were not implemented were used to support students, families, teachers, and staff.

All budgeted expenditures for actions and services were implemented and used to support students, families, teachers, and staff.

A description of the successes and challenges in implementing the actions/services to achieve the goal.

LVCS provided appropriate tiered supports that promote and sustain positive social/emotional development as well as increased academic achievement for all students. The school continued to refine the MTSS Intervention support with online direct instruction and purchased new licenses for online learning. LVCS focused on an Assistant Director to build an online direct instruction for the EL population. Professional Learning Communities were formed with the monthly meetings with school leadership and teachers. LVCS continued to build a system that supports more students in direct instruction. The school recognized the importance of direct instruction and the benefits that it provides for not only within the MTSS and EL, but for the school as a whole.



### Goal 3

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

State and/or Local Priorities addressed by this goal:

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

#### Annual Measurable Outcomes

Expected	Actual
The number of students taking college level courses (concurrent enrollment or within community colleges)	0% students participated in taking college level courses.
Counselors and HST teachers will meet with each student and family to create personalized learning plan.	100% Counselors and HST teachers will meet with each student and family to create a personalized learning plan.
Increase the number of Career Technical Pathways.	0 CTE pathways
Increase the percentage of students scoring at Prepared and Approaching Prepared on the College Career Indicator.	CCI was not released for LVCS, our school began operating in 2019-20 school year. LVCS will receive its first California Dashboard scores in 2021.
Percent of students that pass AP examination with a score of 3 or higher.	0% of students participated in an AP examination in 2019-20.

## Actions / Services

Planned ` Action/Service	Budgeted Expenditures	Actual Expenditures
Increase number of vertically aligned CTE Pathways	\$50,000	\$63,140
Support and provide professional development to administrators and teachers to ensure students demonstrate preparedness as measured by the College Career Indicator.	\$50,000	\$51,200
The school will establish an IGPS review/adjustment procedure that includes reviewing individual student grades after every grading period. Counselors and HSTs will identify, create a plan and monitor for students at risk.	\$0	\$0

## Goal Analysis

A description of how funds budgeted for Actions/Services that were not implemented were used to support students, families, teachers, and staff.

All budgeted expenditures for actions and services were implemented and used to support students, families, teachers, and staff.

A description of the successes and challenges in implementing the actions/services to achieve the goal.

LVCS implemented systems and structures that provide multiple personalized learning paths to increase cohort graduation rate and College and Career Readiness of students to close the achievement gap. Professional development provided to the staff provided training and support for CTE and College/Career Readiness. The school successfully established the Individualized Graduation Plans in partnership with the teacher, family, and high school counselors. LVCS acknowledges that this goal is a continued component with a continued strategic plan for this population of students.

## Goal 4

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

State and/or Local Priorities addressed by this goal:

State Priorities: Priority 3: Parental Involvement (Engagement)  
 Priority 5: Pupil Engagement (Engagement)  
 Priority 6: School Climate (Engagement)  
 Priority 7: Course Access (Conditions of Learning)  
 Local Priorities: Parent Involvement and Engagement  
 School Climate Survey

**Annual Measurable Outcomes**

Expected	Actual
Increase number of students participating in Enrichment opportunities as measured by student enrollment.	Due to Covid restrictions Lake View Charter School suspended all Enrichment activities. New baseline will be developed in 2021-22 LCAP plan.
Increased student participation academic and leadership opportunities such as Yearbook Committee, Student Council, Meet the Masters based on student sign in.	Due to Covid restrictions Lake View Charter School could not increase student participation. New baseline will be developed in 2021-22 LCAP plan.
Increase use of school website and provide parents with updated FAQs, policies, and program descriptions as monitored by Google Analytics.	100% use of the school website and provide parents with updated FAQs, policies, and program descriptions as monitored by Google Analytics.
Maintain chronic absenteeism rate at 0%	The chronic absenteeism rate is 0%.
Maintain the rate of pupil suspension and expulsions rate.	The suspension and expulsion rate are maintained at 0%.
Increase high school cohort graduation rate	LVCS did not have a graduation cohort in 2019-20 school year.
Decrease the high school cohort dropout rate.	LVCS did not have a cohort in 2019-20 school year.
Decrease the middle school dropout rate.	Our SIS does not identify any middle school students as dropouts.
Increase parent participation rate for the school climate survey by 10%.	100% of parents participated in school climate survey

Expected	Actual
Maintain current attendance rates of 95% or higher by ensuring the timely completion of assignments.	Our attendance rate remains steady at 95% or higher for each month.

### Actions / Services

Planned ` Action/Service	Budgeted Expenditures	Actual Expenditures
Implement four-year graduation rate needs assessment and root cause analysis including related professional development	\$0	\$0
Fund parent liaison position to address specific needs of unduplicated students including augmented communication with their families	\$39,837	\$39,837
Fund Foster/homeless youth liaison position to address the specific needs of foster/homeless youth including proactive monitoring of socio-emotional needs.	\$39,837	\$39,837
Implement Project Recovery for students, particularly those with an EL, FY, or SED background, who did not re-enroll with Inspire the following school year as well as those that leave during a school year to decrease the dropout rates in middle and high school.	\$150,000	\$147,640
Increase opportunities for students to participate in leadership and academic events to development confidence and leadership skills.	\$500,000	\$540,730
Maintain updated FAQs, policies, and program descriptions on school website.	\$0	\$0

### Goal Analysis

A description of how funds budgeted for Actions/Services that were not implemented were used to support students, families, teachers, and staff.

All budgeted expenditures for actions and services were implemented and used to support students, families, teachers, and staff.

A description of the successes and challenges in implementing the actions/services to achieve the goal.

LVCS increased student, parent, staff, and community engagement through collaboration, transparency, and communication and provided a broad course of study. The Foster/Homeless Youth Liaison position implemented policies, procedures and supports for this population. The new position provided insight to the school to continue to build support with academic, social-emotional, and intervention for the student population. LVCS will continue to focus on this student population with additional support with a multi-year strategic plan.

DRAFT

# Annual Update for the 2020–21 Learning Continuity and Attendance Plan

The following is the local educational agency’s (LEA’s) analysis of its 2020-21 Learning Continuity and Attendance Plan (Learning Continuity Plan).

## In-Person Instructional Offerings

### Actions Related to In-Person Instructional Offerings

Description	Total Budgeted Funds	Estimated Actual Expenditures	Contributing
Expenditures associated with researching and access to virtual and access to community resources, including museum, Nature program, STEM Experiences, Aerospace Museum, Virtual, Guided Learning Experiences specifically for unduplicated students who have challenges paying for the programs	\$1,500	\$0	Y
Lake View will provide instructional materials and will ensure students have access to appropriate materials in a safe environment improving student outcomes	\$42,000	\$42,000	Y

A description of any substantive differences between the planned actions and/or budgeted expenditures for in-person instruction and what was implemented and/or expended on the actions.

LVCS anticipated costs associated in relation to In-Person Instructional Offerings. The expenditure related to virtual access to community resources lended to the families signing up for their own experiences with the given instructional amounts. With the nature of virtual resources, there was an extraordinary number of opportunities for students to tailor to personalized learning virtual experiences. The need wasn't what was anticipated with the creation of the expenditure. Students though utilized the state-aligned materials more during the 20-21 School year.

### Analysis of In-Person Instructional Offerings

A description of the successes and challenges in implementing in-person instruction in the 2020-21 school year.

Being a non-classroom-based charter, students primarily school at home. An adjustment was the inability to utilize the community partners for enrichment opportunities.

## Distance Learning Program

### Actions Related to the Distance Learning Program

Description	Total Budgeted Funds	Estimated Actual Expenditures	Contributing
MobyMax and other instructional material/resources to help EL, foster youth and low-income students to support intervention and universal learning subscriptions	\$6,756	\$6,756	Y
Technology to support EL Designees to support communication with our students legibly via zoom. Provide modeling and scaffolding during these lessons.	\$1,800	\$1,800	Y
STAR360 diagnostic/interim assessments: Implement a variety of assessments to monitor student progress and continual assessment to provide targeted instruction and intervention	\$10,923	\$10,923	Y
Additional devices, including Chromebooks for English learners, students living in poverty, students placed in foster care, students experiencing homelessness, and those with exceptional needs. This will provide access to online curriculum, online community partners and other resources to support students in academic progress	\$42,075	\$42,075	Y
Lake View will continue to monitor local and state guidelines related to in-person offerings. Technology, access and training will be provided to support staff and students to increase and improve services.	\$12,570	\$12,570	Y
Costs to implement Community Connections program include hot spots for connectivity, web cameras/tripods for the Community Coordinators to host/produce the workshops	\$1,500	\$1,500	Y

A description of any substantive differences between the planned actions and/or budgeted expenditures for the distance learning program and what was implemented and/or expended on the actions.

The expenditures related to implementing distance learning planned to be as estimated when the LCP was drafted. Given the state of the State of California, we shifted the focus to Social Emotional Learning instead of trauma informed practices. With the COVID-19 Pandemic, fortunately there was a wealth of free programs and offerings to support our staff and parents with professional learning incorporating SEL into their day. Therefore, we didn't need to utilize the funds towards SEL. The other expenditures were what our school anticipated spending to be which were budgeted for.

### Analysis of the Distance Learning Program

A description of the successes and challenges in implementing each of the following elements of the distance learning program in the 2020-21 school year, as applicable: Continuity of Instruction, Access to Devices and Connectivity, Pupil Participation and Progress, Distance Learning Professional Development, Staff Roles and Responsibilities, and Support for Pupils with Unique Needs.

Being a non-classroom based charter school, we didn't have the traditional distance learning model as a traditional public school. Challenges that our students faced were the increased need for connectivity and usage of devices with the online options in enrichment, curriculum, online learning opportunities, and synchronous learning online with our teachers. Our staff, also continuing to work from home, needed reliable internet and resources to teach remotely.

### Pupil Learning Loss

#### Actions Related to the Pupil Learning Loss

Description	Total Budgeted Funds	Estimated Actual Expenditures	Contributing
Homeschool Teachers to provide instruction for all students, Provide school counselors to support students in targeted services with social and academic wellness: in-person/distance learning platform, provide junior high virtual academy coordinator and lead teacher, provide high school virtual academy coordinator, special education teachers, intervention specialists, Executive Director/Assistant	\$244,632	\$244,632	Y



Principals/Specialists provide instructional coaching for teachers; lead “data talks” discussions and analysis on student assessment results, monitor and supervise services for EL; and monitor student attendance and participation schoolwide, student intervention support, school psychologists, high school success coordinator * 10% of certificated salaries will be funded with LCFF Supplemental & Concentration funds (contributing column) and the remaining 90% with LCFF Base Funds			
Staff and parent training related to understanding our MTSS, and expressly what resources are provided at each tier	\$1,500	\$0	Y
Staff and parent training related to understanding our English Language Development strategies	\$1,000	\$0	Y

A description of any substantive differences between the planned actions and/or budgeted expenditures for addressing pupil learning loss and what was implemented and/or expended on the actions.

In regard to pupil learning loss, again due to the in-staff PD that were already developed, we didn’t have a need to purchase any additional training for our staff and parents. Our staff and parents did receive training understanding MTSS and ELD, but we utilized staffing, resources that were already embedded into our budget. Again, as stated above, there were additional free resources this year, unlike before, that our school was able to utilize to support these vital areas of training.

### Analysis of Pupil Learning Loss

A description of the successes and challenges in addressing Pupil Learning Loss in the 2020-21 school year and an analysis of the effectiveness of the efforts to address Pupil Learning Loss to date.

As a non-classroom based independent study charter school, homeschooling students were able to continue the different modes of learning with teacher-directed, online and within the blended instructional model. Teachers communicated and met with students through digital platforms. Students chose to enroll in new direct-instruction opportunities such as HSVA and JHVA in core subjects which provided instruction at home. One challenge that the school had was the 10-15% percentage of students that participated in the benchmark diagnostic (STAR) in English language arts and mathematics. Feedback from families who took the benchmark felt they have been doing so much learning online, technology overload, COVID related life circumstances, it was another online time for their student to be on technology. With COVID there is a changed family dynamic that has made testing difficult in a student’s home. Although all students have access to technology and internet access, there are a few areas where student connectivity is still in

question, due to the location of a student's home. There was an increase in our Intervention classes during 20-21, as more students needed additional support without the in-person academic enrichment opportunities normally offered.

## **Analysis of Mental Health and Social and Emotional Well-Being**

A description of the successes and challenges in monitoring and supporting mental health and social and emotional well-being in the 2020-21 school year.

The school completed the Care backpacks for our homeless population through collaboration with the teacher and family. A Social Emotional Website was launched along with items such as Mindset Mondays, dedicated time with counselors, online SEL supports, Community Connections events to bring students together, JHVA and HSVA also provided learning and social opportunities for students to connect. The Multicultural Diversity and Inclusion Program brought new and a continued awareness of our diverse world and student population which brought a new heightened awareness for our school and community. Results from the parent survey showed 39% of parents did not find our students mental wellbeing concerning.

## **Analysis of Pupil and Family Engagement and Outreach**

A description of the successes and challenges in implementing pupil and family engagement and outreach in the 2020-21 school year.

Teachers continued to meet virtually with their students to provide continued student engagement with checks, office hours, scheduled live synchronous sessions, participation in diagnostic assessment and completion of assignments as documented in our student information system. Many families chose to attend our virtual community events that had series on different topics both educational and enrichment. Families also opted to join many of the parent education nights and Multicultural and Diversity Inclusion Program opportunities for additional connection. Families were able to connect with one another with thematic virtual events held by Community Connections. The JHVA had an online science fair. Our NHS held outreaches too for the students to engage with one another online. With connectivity being a challenge, our school provided technology and access to the Internet for students that needed this. We also provided online curriculum options for students that provided supplemental and full online curriculum options to enhance learning. Our interim benchmark assessment assisted in data collection, analysis, and planning for learning loss. With COVID-19, parent education workshops online provided much needed support. Our staff received a social emotional wellness PD from a keynote speaker in January. Based on our parent survey results 61% of our parents are not concerned in this period of uncertainty.

## Analysis of School Nutrition

A description of the successes and challenges in providing school nutrition in the 2020-21 school year.

As a non-classroom based independent study charter school, we do not have facilities to serve meals.

## Additional Actions and Plan Requirements

Additional Actions to Implement the Learning Continuity Plan

Section	Description	Total Budgeted Funds	Estimated Actual Expenditures	Contributing
N/A	N/A	N/A	N/A	N/A

A description of any substantive differences between the planned actions and budgeted expenditures for the additional plan requirements and what was implemented and expended on the actions.

N/A

## Overall Analysis

An explanation of how lessons learned from implementing in-person and distance learning programs in 2020-21 have informed the development of goals and actions in the 2021–24 LCAP.

LVCS continued with the three educational models during the 20-21 School Year. With the additional synchronous instruction options for junior high, high school, English learners, and intervention classes, this placed a foundation for students. With the dynamics of student's homes with parents working while students are schooling, more students took the opportunity to participate in the courses. The school saw a gain in student engagement and test scores with the online direct instruction and has planned to continue and increase course offerings in the future. Professional Development during the 20-21 School year was more targeted, and data driven tailored to the internal benchmark diagnostics. Building community in the virtual world along with course offerings lended to be a strength during COVID. With the increase in student engagement in academic course offerings and desire for in person activities, the

school will continue to build programs to support the elementary aged students. The continued need for the support of mental health and social-emotional well-being will continue to be on the forefront for our schools and for schools for the next three year, and most probably more. Our Student Services side developed and will continue to develop more programs, offerings, opportunities to support students and staff.

An explanation of how pupil learning loss continues to be assessed and addressed in the 2021–24 LCAP, especially for pupils with unique needs.

For the 2021-24 LCAP's, as stated above, there will be a continued focus on direct instruction to address pupil learning loss for our unduplicated and students with disabilities elementary to high school students in core and enrichment subjects. Our EL students will continue to receive asynchronous English Language Development focused on grade level bans and EL levels determined by ELPAC results. Our Unduplicated students and SWD will be offered asynchronous instruction courses, as well as opportunities for intervention courses. Our staff will continue to focus on data driven practices from our benchmark assessments to deliver instructional strategies and curriculum to support students' specific learning needs. We will provide a pre and post assessment to help gauge academic progress.

A description of any substantive differences between the description of the actions or services identified as contributing towards meeting the increased or improved services requirement and the actions or services implemented to meet the increased or improved services requirement.

There were no substantive differences between the actions/services identified as contributing towards meeting the increased or improved services requirement.

## **Overall Analysis of the 2019-20 LCAP and the 2020-21 Learning Continuity and Attendance Plan**

A description of how the analysis and reflection on student outcomes in the 2019-20 LCAP and 2020-21 Learning Continuity and Attendance Plan have informed the development of the 21-22 through 23-24 LCAP.

Student outcomes along with stakeholder feedback from the 2019-20 LCAP and 2020-21 Learning Continuity and Attendance Plan have informed the development of the 21-22 through 23-24 with a more data driven approach. Our team has utilized the Dashboard, internal benchmarks, teacher data from Learning Period Meetings, and external data analyst companies to assist in driving a focus pertaining to increasing student achievement, both individually and collectively within unduplicated student groups. As the team

reflected on data, along with stakeholder input, these components helped to guide LVCS in an approach to educate not only the academics but also the social-emotional well-being of students.

DRAFT

## Instructions: Introduction

The Annual Update Template for the 2019-20 Local Control and Accountability Plan (LCAP) and the Annual Update for the 2020–21 Learning Continuity and Attendance Plan must be completed as part of the development of the 2021-22 LCAP. In subsequent years, the Annual Update will be completed using the LCAP template and expenditure tables adopted by the State Board of Education.

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

## Instructions: Annual Update for the 2019–20 Local Control and Accountability Plan Year

### Annual Update

The planned goals, state and/or local priorities, expected outcomes, actions/services, and budgeted expenditures must be copied verbatim from the approved 2019-20 Local Control and Accountability Plan (LCAP). Minor typographical errors may be corrected. Duplicate the Goal, Annual Measurable Outcomes, Actions / Services and Analysis tables as needed.

### Annual Measurable Outcomes

For each goal in 2019-20, identify and review the actual measurable outcomes as compared to the expected annual measurable outcomes identified in 2019-20 for the goal. If an actual measurable outcome is not available due to the impact of COVID-19 provide a brief explanation of why the actual measurable outcome is not available. If an alternative metric was used to measure progress towards the goal, specify the metric used and the actual measurable outcome for that metric.

### Actions/Services

Identify the planned Actions/Services, the budgeted expenditures to implement these actions toward achieving the described goal and the actual expenditures to implement the actions/services.

### Goal Analysis

Using available state and local data and input from parents, students, teachers, and other stakeholders, respond to the prompts as instructed.

- If funds budgeted for Actions/Services that were not implemented were expended on other actions and services through the end of the school year, describe how the funds were used to support students, including low-income, English learner, or foster youth students, families, teachers and staff. This description may include a description of actions/services implemented to mitigate the impact of COVID-19 that were not part of the 2019-20 LCAP.
- Describe the overall successes and challenges in implementing the actions/services. As part of the description, specify which actions/services were not implemented due to the impact of COVID-19, as applicable. To the extent practicable, LEAs are encouraged to include a description of the overall effectiveness of the actions/services to achieve the goal.

# Instructions: Annual Update for the 2020–21 Learning Continuity and Attendance Plan

## Annual Update

The action descriptions and budgeted expenditures must be copied verbatim from the 2020-21 Learning Continuity and Attendance Plan. Minor typographical errors may be corrected.

## Actions Related to In-Person Instructional Offerings

- In the table, identify the planned actions and the budgeted expenditures to implement actions related to in-person instruction and the estimated actual expenditures to implement the actions. Add additional rows to the table as needed.
- Describe any substantive differences between the planned actions and/or budgeted expenditures for in-person instruction and what was implemented and/or expended on the actions, as applicable.

## Analysis of In-Person Instructional Offerings

- Using available state and/or local data and feedback from stakeholders, including parents, students, teachers and staff, describe the successes and challenges experienced in implementing in-person instruction in the 2020-21 school year, as applicable. If in-person instruction was not provided to any students in 2020-21, please state as such.

## Actions Related to the Distance Learning Program

- In the table, identify the planned actions and the budgeted expenditures to implement actions related to the distance learning program and the estimated actual expenditures to implement the actions. Add additional rows to the table as needed.
- Describe any substantive differences between the planned actions and/or budgeted expenditures for the distance learning program and what was implemented and/or expended on the actions, as applicable.

## Analysis of the Distance Learning Program

- Using available state and/or local data and feedback from stakeholders, including parents, students, teachers and staff, describe the successes and challenges experienced in implementing distance learning in the 2020-21 school year in each of the following areas, as applicable:
  - Continuity of Instruction,
  - Access to Devices and Connectivity,
  - Pupil Participation and Progress,
  - Distance Learning Professional Development,
  - Staff Roles and Responsibilities, and

- Supports for Pupils with Unique Needs, including English learners, pupils with exceptional needs served across the full continuum of placements, pupils in foster care, and pupils who are experiencing homelessness

To the extent practicable, LEAs are encouraged to include an analysis of the effectiveness of the distance learning program to date. If distance learning was not provided to any students in 2020-21, please state as such.

## **Actions Related to Pupil Learning Loss**

- In the table, identify the planned actions and the budgeted expenditures to implement actions related to addressing pupil learning loss and the estimated actual expenditures to implement the actions. Add additional rows to the table as needed.
- Describe any substantive differences between the planned actions and/or budgeted expenditures for addressing pupil learning loss and what was implemented and/or expended on the actions, as applicable.

## **Analysis of Pupil Learning Loss**

- Using available state and/or local data and feedback from stakeholders, including parents, students, teachers and staff, describe the successes and challenges experienced in addressing Pupil Learning Loss in the 2020-21 school year, as applicable. To the extent practicable, include an analysis of the effectiveness of the efforts to address pupil learning loss, including for pupils who are English learners; low-income; foster youth; pupils with exceptional needs; and pupils who are experiencing homelessness, as applicable.

## **Analysis of Mental Health and Social and Emotional Well-Being**

- Using available state and/or local data and feedback from stakeholders, including parents, students, teachers and staff, describe the successes and challenges experienced in monitoring and supporting Mental Health and Social and Emotional Well-Being of both pupils and staff during the 2020-21 school year, as applicable.

## **Analysis of Pupil and Family Engagement and Outreach**

- Using available state and/or local data and feedback from stakeholders, including parents, students, teachers and staff, describe the successes and challenges related to pupil engagement and outreach during the 2020-21 school year, including implementing tiered reengagement strategies for pupils who were absent from distance learning and the efforts of the LEA in reaching out to pupils and their parents or guardians when pupils were not meeting compulsory education requirements or engaging in instruction, as applicable.

## **Analysis of School Nutrition**

- Using available state and/or local data and feedback from stakeholders, including parents, students, teachers and staff, describe the successes and challenges experienced in providing nutritionally adequate meals for all pupils during the 2020-21 school year, whether participating in in-person instruction or distance learning, as applicable.



## Analysis of Additional Actions to Implement the Learning Continuity Plan

- In the table, identify the section, the planned actions and the budgeted expenditures for the additional actions and the estimated actual expenditures to implement the actions, as applicable. Add additional rows to the table as needed.
- Describe any substantive differences between the planned actions and/or budgeted expenditures for the additional actions to implement the learning continuity plan and what was implemented and/or expended on the actions, as applicable.

## Overall Analysis of the 2020-21 Learning Continuity and Attendance Plan

The Overall Analysis prompts are to be responded to only once, following an analysis of the Learning Continuity and Attendance Plan.

- Provide an explanation of how the lessons learned from implementing in-person and distance learning programs in 2020-21 have informed the development of goals and actions in the 2021–24 LCAP.
  - As part of this analysis, LEAs are encouraged to consider how their ongoing response to the COVID-19 pandemic has informed the development of goals and actions in the 2021–24 LCAP, such as health and safety considerations, distance learning, monitoring and supporting mental health and social-emotional well-being and engaging pupils and families.
- Provide an explanation of how pupil learning loss continues to be assessed and addressed in the 2021–24 LCAP, especially for pupils with unique needs (including low income students, English learners, pupils with disabilities served across the full continuum of placements, pupils in foster care, and pupils who are experiencing homelessness).
- Describe any substantive differences between the actions and/or services identified as contributing towards meeting the increased or improved services requirement, pursuant to *California Code of Regulations*, Title 5 (5 CCR) Section 15496, and the actions and/or services that the LEA implemented to meet the increased or improved services requirement. If the LEA has provided a description of substantive differences to actions and/or services identified as contributing towards meeting the increased or improved services requirement within the In-Person Instruction, Distance Learning Program, Learning Loss, or Additional Actions sections of the Annual Update the LEA is not required to include those descriptions as part of this description.

## Overall Analysis of the 2019-20 LCAP and the 2020-21 Learning Continuity and Attendance Plan

The Overall Analysis prompt is to be responded to only once, following the analysis of both the 2019-20 LCAP and the 2020-21 Learning Continuity and Attendance Plan.

- Describe how the analysis and reflection related to student outcomes in the 2019-20 LCAP and 2020-21 Learning Continuity and Attendance Plan have informed the development of the 21-22 through 23-24 LCAP, as applicable.

California Department of Education  
January 2021

# Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Lake View Charter School	Julie Haycock, Executive Director	julie.haycock@lakeviewcharter.org (916) 241-8667

## Plan Summary [2021-22]

### General Information

A description of the LEA, its schools, and its students.

Lake View Charter School (LVCS) opened in the fall of the 2019-20 school year. Lake View Charter School is a WASC accredited, non-classroom based public charter school authorized by Lake Elementary School District in Glenn County serving approximately 500 students in Glenn, Colusa, Butte, Lake, Mendocino, and Tehama Counties from transitional kindergarten through 12th-grade. We take great pride in being able to offer our students flexible personalized learning experiences through our many unique and dynamic programs. Our school values and supports parent choice and personalized learning for all students. LVCS Home School Teachers (HST's) are California credentialed teachers who partner with families to nurture, guide and enhance a student's educational needs. A focus of collaboration with academic achievement and the development of the whole child with personalized learning is pivotal. LVCS teachers collaborate with parents/learning coaches to create Learning Plans for students each learning period that outlines the lessons to be completed during a specified time frame. All students have access to online all access curriculum as well as curriculum to support educational standards. Internal benchmark diagnostic assessment data gathered from a computerized adaptable test, taken each fall, winter, and spring, for grades TK-12, pinpoints the proficiency level of students across a range of subjects. The benchmark diagnostic assessments are specifically designed to provide meaningful information for gauging student progress toward mastery of the skills measured by the summative assessments. This data along with learning styles are used to build the individualized learning path for each student to target specific learning objectives and standards. Regular assessment determines the level of mastery and individualizing the Learning Plan helps students progress quickly. Teachers can provide instruction and support either in person or online through web-conference platforms. This tool allows for teacher collaboration and instruction by using video, voice, text, and shared writing space. Students have twenty-four-hour access to all curricula, and learning can take place at a variety of locations according to student and family preference, including libraries and the students' residences. LVCS's tiered level of support is robust and differentiated for different learning styles. LVCS is continuously planning and adjusting programs to meet the needs of the student population served. Lake View Charter School's leadership and staff look forward to continuing their collaboration with the district in providing an option to students looking for an Independent study/homeschool program. It is our mission at Lake View Charter School to develop the individual gifts of students in Glenn County and adjacent counties to become proficient in Common Core State Standards and become critical thinkers, responsible citizens and innovative leaders prepared for academic and real-life achievement in the 21st Century. The mission will be accomplished in a personalized environment that fosters successful achievement through quality, personalized, standards-based education, which could include online coursework, offline textbook work, and unique hands-on and experiential learning experiences facilitated in partnership with students, parents, staff, and community.

## Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

At Lake View Charter, we have goals for our students that are known as Schoolwide Learner Outcomes (SLOs). SLOs are a part of our school culture: they reflect our school vision, the College and Career Readiness standards, and the education of the whole child. The Junior High Virtual Academy (JHVA) and High School Virtual Academy (HSVA) were developed this year to support students. Both programs were developed to teach live online instruction providing standards aligned courses by credentialed teachers. LVCS has also implemented an online direct instruction platform (four-to-six-week direct instruction, intervention courses for mathematics and language arts), and other programs so that all students have the critical thinking skills to be successful in college and career pathways. Lake View opened in 2019-20, the 2020 California School Dashboard would have been the first dashboard released for Lake View but due to the Senate Bill 98 which suspended the reporting of state and local indicators on the 2020 California School Dashboard we do not have any data to analyze and report in terms of state accountability measures. To monitor our students collectively we are using interim benchmark assessments to analyze and understand where our students are currently performing. Based on our interim benchmark assessments currently an average of 48% of our students are performing at standards met/exceeded for Math and an average of 73% of our students are at standards met/exceeded for ELA.

## Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

Lake View Charter School opened in 2019-20, the 2020 California School Dashboard would have been the first dashboard released for Lake View but due to the Senate Bill 98 which suspended the reporting of state and local indicators on the 2020 California School Dashboard we do not have any data to analyze and report in terms of state accountability measures. Therefore, no areas of identified need or performance gaps are available to address.

## LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

Lake View Charter School takes state accountability measures very seriously and understands that there are areas we need to prioritize and create new policies or procedures to address and improve to achieve student academic success. LVCS has supported SWD's need for targeted language arts instruction by adding Reading Specialists, structured multi-sensory literacy programming as well as reading programs for specialized academic instruction. We have taken steps such as providing additional support for our unduplicated students such as professional learning for families and staff focused on instructional strategies to help students reach their academic potential. We will also implement and assess formative and interim assessments to be able to monitor our students throughout the year. With the provided data, we disaggregate the information to provide the individualized support needed for each student before the administration of the state assessments. This action plan will help students improve their overall scores on the state assessments and strengthen their academic performance. The College and Career Indicator is also an area of focus. To increase the number of students who are college and career ready, we will increase the number of course offerings in college and career indicators providing students with more opportunities to meet the requirements within this state indicator. Graduation Rate Indicator is also an area of focus for LVCS, we have created new roles and procedures to be able to monitor data

regarding student dropout rates. Our school has continued to build professional development about CCI indicators and implemented an additional planning tool on our Individualized Graduation Plan for students, parent, and teacher future planning.

## Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

### Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Our school has not been identified for CSI.

### Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Our school has not been identified for CSI.

### Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Our school has not been identified for CSI.

## Stakeholder Engagement

A summary of the stakeholder process and how the stakeholder engagement was considered before finalizing the LCAP.

Before developing the process of LCAP, our school initially conducted several meetings with different departments within our school. We began this process by gaining insight and perspective to what our teachers and staff felt our areas of focus should be within each department. We also sent our surveys to our stakeholders: community partners, staff, parents, and students to receive feedback regarding what they feel our school strategies, policies, or procedures should include for next year as actions items we can implement. The surveys we received from our stakeholders were analyzed thoroughly to gain insight on what overarching goals should be for our school and within those goals how we can create actions to meet the needs of our community. Our team presented to the School Board a series of LCAP presentations which consisted of information related to proposed goals and actions for the upcoming years to foster collaboration, transparency, and to gather input. Meetings occurred with the English Learners Advisory Committee which consists of parents of our English Learners. Presentations to Charter department staff were held to gather department feedback. A charter wide staff presentation was conducted at a monthly staff meeting. Lastly, we collaborated with our SELPA where we asked for any feedback regarding our proposed goals and actions for the coming years.

A summary of the feedback provided by specific stakeholder groups.

Describe and summarize the stakeholder feedback provided by specific stakeholders. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from stakeholders.

When analyzing the feedback, we received with various stakeholders we received an immense amount of positive feedback regarding the current set policies and procedures and what we have planned for the coming years. The feedback from our parents of English Learners Advisory Committee consisted of great positivity regarding our English Language Development courses and parents felt very supported with our current program. Some suggestions the committee felt would be beneficial for the program consisted of offering more paper based English Language Development supplemental programs rather than a complete online based program. The Committee also suggested offering more afternoon zoom courses, having access to Star 360 interim benchmark assessments in the parental portal, and having the weekly newsletter contain information regarding what teachers are working on in classes. Analyzing the feedback received from our parents through the surveys we received great suggestions which we have incorporated into our LCAP as action items and almost all our parents were extremely satisfied with the current policies and procedures of our school. The feedback received consisted of adding more parent workshops related to strengthening student achievement and resuming in person activities for students, which was suspended due to COVID restrictions. The staff feedback received from the surveys was very positive regarding how the school is working collaboratively and aligning curriculum programs with state standards. When asked which state priorities the school should focus on, much of the staff felt we should prioritize the following state priorities Basic Services (Teacher credential, instructional materials), Course Access (Student access to a broad course of study), and Parent Involvement (Efforts to seek parent input and participation). We have thoroughly gone through the feedback received from each of our stakeholders and have been actively working on how we can incorporate the recommendations received to meet the needs of our community. We thank our stakeholders for their participation in the surveys.

A description of the aspects of the LCAP that were influenced by specific stakeholder input.

Lake View Charter School believes in putting the community we serve first and addressing their individual needs as action, to be able to create an optimal learning environment for the families we serve. After receiving feedback from our stakeholders, many of their recommendations regarding our programs within each department of our school were considered when proceeding with developing our planned goals, actions, and metrics for the 2020-21 LCAP. Our English Learner population is an area we are always looking to improve and create more supportive learning for our students and parents. From the feedback we received from our English Learners Advisory Committee we are implementing actions such as professional learning for families and staff which will focus on instructional strategies and being able to collaborate with parents and help support our English Learner population to reach their academic goals. The goals and actions we specifically added from our ELAC input include:

-Goal 2, Action 2: Hire and maintain certificated staff to provide online/synchronous instruction, programs, and support for our English Learners. This will contribute to our plans to offer more creative English Language Development support options available both online and paper based.

From the feedback we received from our surveys to our parents we found there was a need for additional professional development for our families to ensure they have all the information they need about our curriculum and programs for all our students and specifically our unduplicated students. To address this area of need we have specifically implemented:

- Goal 1 Action 1: Professional Learning related to student learning needs, particularly for English learners, foster youth, students who qualify for free or reduced lunch

- Goal 1 Action 2: Professional Learning related to student learning needs, particularly for Students with Disabilities.

We also received feedback from our High school graduate students for this year through our grad survey sent out by our High School department. Analyzing the responses, we received regarding our CTE program and our college and career readiness programs led us to create Goal 3: Increase the number of students who are high school, college, career, and life ready and within the goal create the following action items:

-Goal 3 Action 2: Provide College Readiness Assessments and Preparatory Workshops

-Goal 3 Action 1: Increase number of course offerings in college and career indicators

Lastly, we met with our SELPA and received feedback in terms of prioritizing the needs of our students with special needs which led us to create the following Goal and actions:

-Goal 3 Action 3: Partnership with Earn and Learn Organization and additional secondary support programs

-Goal 3 Action 4: Individualized Graduation Plan

We hope to ensure the implementation of these actions will provide us with the growth we are expecting in the coming school years and be able to optimize our student achievement data. Overall, we are very thrilled for the new changes in the coming years and how we were able to meet with each of our stakeholders, parents, and students and be able to use the feedback we receive into action items for our schools future planning.

## Goals and Actions

### Goal

Goal #	Description
1	LVCS will continue to develop plans and utilize data to strengthen student achievement for all students. List priorities Priority 1: Basic (Conditions of Learning) Priority 2: State Standards (Conditions of Learning) Priority 7: Course Access (Conditions of Learning)

### An explanation of why the LEA has developed this goal.

LVCS is a strong believer in data driven decision making and how we can constantly monitor student academic data to maintain or improve current set policies and procedures. We are working on using various lenses of approach to identify areas of need and focus on implementing new strategies and techniques to increase student achievement. The actions we have initiated will directly contribute to utilizing student achievement data to progress on California State dashboard indicators. We had created these actions and metrics because we saw a performance gap for certain student groups and on specific dashboard indicators and needed to close the achievement gap. Our actions provide additional support and the tools needed to help our student groups performing at a red or orange performance level reach their higher achievement level goals.

We have utilized the STAR 360 program in order to monitor the progress of our students by conducting these interim assessments throughout the year. The administration of these assessments will allow for us to collect data in relation to where our students are performing before the state assessments and be able to provide additional individualized support where needed for our students.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
100% of students will have home access to technology and the Internet.	100%				100%
Increase participation rate on Interim benchmarks assessments	ELA 94% Math 94%				ELA 96% Math 96%
% of teachers report mastery on program implementation including Data Analysis, differentiation, assessment, and technology use.	96%				100%
100% of teachers will be fully credentialed in the area of instruction or assignment.	100%				100%
% of students enrolled in Direct instruction courses offerings	0%				50%
Schoolwide Distance from standard	The 2020 CAASPP assessments were waived due to the COVID-19				-20.0

(DFS) on the Caaspp ELA	pandemic. 2021 Data will become our baseline				
Schoolwide Distance from standard (DFS) on the Caaspp MATH	The 2020 CAASPP assessments were waived due to the COVID-19 pandemic. 2021 Data will become our baseline				-50.0
% of students who have access to standard aligned instructional material	100%				100%
Maintain safe facilities as demonstrated in a local inventory report.	LVCS does not have a facility				N/A
Implementation of state standards, particularly English language development	100%				100%
% of students who score at standards Met/Exceeded on California Science Test (CAST)	The 2020 CAST assessments were waived due to the COVID-19 pandemic. 2021 Data will become our baseline				35%
% of students scoring at ready or conditionally ready on the EAP for ELA	The 2020 EAP assessments were not available due to the COVID-19 pandemic. 2021 Data will become our baseline				57%

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% of students scoring at ready or conditionally ready on the EAP for Math	The 2020 EAP assessments were not available due to the COVID-19 pandemic. 2021 Data will become our baseline				35%
% of priority group students (EL, FY, those with exceptional needs) who received tier 2 support)	11.4%				25%

## Actions

Action #	Title	Description	Total Funds	Contributing
1	Professional Learning related to student learning needs, particularly for English Learners, foster youth, students who qualify for free or reduced lunch	We will provide professional learning for families and staff focused on instructional strategies as well as the importance and impacts of state testing. We are aware that certain student groups such as English Learners, foster youth, and students who qualify for free or reduced lunch are in most need of academic support. For example, we will meet with families to provide learning resources and strategies. We will also meet once a month as a Professional Learning Community as an entire staff and additionally as a smaller group to focus on professional learning.	\$60,346	Y
2	Professional Learning related to student learning needs, particularly for Students with Disabilities	We will provide professional learning for families and staff focused on instructional strategies as well as the importance and impacts of state testing. We are aware that certain groups such as our Students with Disabilities are in most need of academic support. For example, we will meet with families to provide learning resources and strategies. We will also meet once a month as a Professional Learning Community as an entire staff and additionally as a smaller group to focus on professional learning.	\$104,814	Y

3	Implement and assess formative and interim assessments	<p>We will implement assessments regularly to help us determine whether and to what degree students are making progress toward expected learning outcomes. We will focus on programs for students who are not demonstrating proficiency in ELA and Math from prior CAASPP and STAR 360. This action will improve services for our unduplicated groups and students with disabilities because it will add to our current program. This action will be implemented schoolwide; however, we believe our unduplicated student groups will benefit principally because these groups are less likely to have academic support at home. These are the best use of funds because our data demonstrates that these students need additional support which, as a school we will be able to closely monitor with a data driven model to focus target instruction to mitigate a potential increase in student learning loss.</p>	\$68,932	Y
4	Increase the number of live or synchronous classes/ workshops for Elementary level grades	<p>We are creating and implementing a TK-6 academic online program with instruction from our teachers. This program will consist of online/synchronous classes and rotating workshops focusing on standards-based mathematics and language arts foundational concepts. We will target students who are working towards proficiency in ELA and Math from prior CAASPP and STAR 360 testing data. This program will increase and improve services for our unduplicated groups and is in addition to our current program offerings. It will be implemented schoolwide, however, our unduplicated student groups will benefit principally, as students in these groups are more likely to need additional academic support. These are the best use of funds because our data demonstrates that these students need additional support which can be provided by our credentialed teaching staff who can model and closely monitor student understanding.</p>	\$0	Y
5	Purchase additional technology	<p>We will provide mobile internet connectivity and technology for student use for connectivity at home. The goal is schoolwide and is important because most of our resources and curriculum are offered online. An example is to provide a standards-based online curriculum for our unduplicated students. Another example is providing hotspots to ensure that our unduplicated students can attend our live or synchronous classes for academic and social emotional well-being. Schoolwide, however, we know priority groups will benefit due to financial restraints of these students.</p>	\$20,000	Y

6	Hire and maintain certificated staff to provide online/synchronous instruction, programs, and support.	We will hire certificated staff to expand our middle school direct instruction courses for English Language Arts and Math. Additionally, we will hire and maintain certificated staff to create online/synchronous instruction support programs for students who are not demonstrating proficiency in ELA and Math from prior CAASPP and STAR 360. This action will increase and improve services for our unduplicated groups because it will add to a current program. This action will be implemented schoolwide; however, we believe our unduplicated student groups will benefit principally because these groups are less likely to have academic support at home. These are the best use of funds because our data demonstrates that these students need additional support due to school closures and the pandemic there is an increase in student learning loss which we hope to mitigate with this action.	\$40,853	Y
7	Purchase of resources to support Multi-Tiered System of Support (MTSS), Student Study Team (SST), & Section 504 access, process, and compliance	We will purchase digital and paper resources, software, and workshops to assist staff, teachers and families with student services and the processes within the department. We are aware that student services have certain documents, processes and needs associated with compliance. The purchase of these will help in streamlining the process for our schools. An example of an expenditure is for our Student Study Team and Section 504 processes, Beyond SST will promote a digital manner for making referrals, scheduling, and holding meetings, creating Intervention and 504 plans as well as tracking data. Unduplicated students will benefit from the purchase of resources as some families have requested to remain off technology, therefore the ability to purchase printed materials will accommodate and support their educational requests. This will also support child find and create a continuum of supports and services for students.	\$1,374	Y

## Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As per CDE guidelines, the Goal Analysis section will be implemented in the 2022-23 LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures.

As per CDE guidelines, the Goal Analysis section will be implemented in the 2022-23 LCAP.

An explanation of how effective the specific actions were in making progress toward the goal.

As per CDE guidelines, the Goal Analysis section will be implemented in the 2022-23 LCAP.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As per CDE guidelines, the Goal Analysis section will be implemented in the 2022-23 LCAP.

## Goals and Actions

### Goal

Goal #	Description
2	<p>LVCS will promote a safe, healthy, and engaged learning environment for all students.</p> <p>List Priorities</p> <p>Priority 4: Pupil Achievement (Pupil Outcomes)</p> <p>Priority 7: Course Access (Conditions of Learning)</p> <p>Priority 8: Other Pupil Outcomes (Pupil Outcomes)</p>

An explanation of why the LEA has developed this goal.

This goal was developed to ensure all students including unduplicated students (foster youth, English learners, and students who qualify for free or reduced lunch) are receiving the additional support they need. To monitor students and address any individualized area of need we will hire additional staff and set procedures to be able to provide any additional support. We will hire and maintain certificated staff to provide online/synchronous instruction, programs, and support for our English Learners. To ensure improvement on our English Learners reclassification, to improve these results we will fund support staff for unduplicated student support, which includes hiring a bilingual family liaison to support our non-English speaking populations. We hope these actions will contribute to improving our overall Goal to promote a safe, healthy, and engaged learning environment for all our student

# Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
% of students who feel safe or connected to the school	Students: 93% Parents: 95% Teachers: 94%				Students:100% Parents: 100% Teachers: 100%
The percent student suspension rate	0%				0%
The percent student expulsion rate	0%				0%
The percent High school dropout rate	0%				0%
The percent Middle school dropout rate	0%				0%
Maintain Chronic Absenteeism Indicator at 0% for all students	0%				0%
1% increase in student attendance or maintenance of a minimum of 98% attendance rate annually	100%				100%
Increase opportunities for student participation in leadership, enrichment, and academic events i.e., NHS NJHS, Enrichment	Fall: 24 students Spring: 21 students				Fall: 100 students Spring: 100 students

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% of parents who provide feedback on survey specific to our LCAP actions and goals	100%				100%
% of parents/guardians of English learners, foster youth, and students who qualify for free or reduced lunch meet with a resource specialist such as our foster youth liaison or EL coordinator at least once a year	100%				100%
The percent of English learners who reclassify	0.2%				15%
The percent of English learners who are making progress towards English proficiency on ELPI	The 2020 ELPI results not available due to the COVID-19 pandemic. 2021 Data will become our baseline				65%

## Actions

Action #	Title	Description	Total Funds	Contributing
1	Fund support staff for unduplicated student support	We will fund foster/homeless youth and family liaison positions to address specific needs of unduplicated and students with disabilities including augmented communication with families to receive information and support in the appropriate language. For example, we will utilize our foster/homeless youth liaison position to partner	\$30,000	Y

		with families to assist in meeting the educational, social, and emotional needs of students. We will also hire family liaisons who also speak another language besides English, to support our non-English speaking populations.		
2	Hire and maintain certificated staff to provide online/ synchronous instruction, programs, and support for our English Learners.	To improve and increase our academic support for English learners including those with disabilities, we will refine and improve our English language development curriculum and instructional delivery. Expenditures related to this action are the hiring of additional certificated staff and programs.	\$0	Y
3	Fund School Counselor/SST Coordinator	According to our parent survey 61% of our parents who participated in the survey were concerned with their child's mental health. To support our families and provide a resource we will fund the School Counselor/SST coordinator. This position will oversee and provide social-emotional and counseling services, supports and referrals. The Coordinator will work to hold virtual SST meetings. The Counselor/SST Coordinator will offer group sessions/1:1, check in with students, lead SST meetings with a whole child perspective with Social Emotional Learning, academic, suicide risk assessment, students in crisis, dedicated time with unduplicated, collecting community-based resources for families. Although this is a schoolwide support, the position will focus on our priority group of students in need of academic intervention which includes Foster youth, low SED backgrounds, special education, and English learners. This position will provide support to students clinically and educationally. For example, counselors will address social and emotional needs of students through a variety of ways including workshops, whole group practices, small group interventions, and individualized learning activities. Another example is that our counselor will provide ongoing training and support to charter staff.	\$9,380	Y
4	Fund positions for monitoring student achievement data	Focusing on priority group students such as EL, FY, or SED background, who did not re-enroll with the following school year, as well as those that leave during the school year to decrease the dropout rates in middle and high school. This will improve and increase services with a dedicated staff member to collaborate with families, High School Counselors, and the High School Department to assist our priority groups and schoolwide students. Our priority groups will benefit from this position as they will partner with our translators to assist, if needed also.	\$0	Y

# Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As per CDE guidelines, the Goal Analysis section will be implemented in the 2022-23 LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures.

As per CDE guidelines, the Goal Analysis section will be implemented in the 2022-23 LCAP.

An explanation of how effective the specific actions were in making progress toward the goal.

As per CDE guidelines, the Goal Analysis section will be implemented in the 2022-23 LCAP.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As per CDE guidelines, the Goal Analysis section will be implemented in the 2022-23 LCAP.

## Goals and Actions

### Goal

Goal #	Description
3	<p>Increase the number of students who are high school, college, career, and life ready.</p> <p>List priorities:</p> <ul style="list-style-type: none"> <li>Priority 3: Parental Involvement (Engagement)</li> <li>Priority 5: Pupil Engagement (Engagement)</li> <li>Priority 6: School Climate (Engagement)</li> </ul>

An explanation of why the LEA has developed this goal.

This goal was developed to increase college and career readiness amongst our high school students. There is a need to increase the number of students participating and improving in college assessments. We will provide students with College Readiness Assessments and Preparatory Workshops to ensure they are supported in every way. We hope to ensure all our students in secondary education increase their performance on all college and career readiness measures with the additional support we have planned as actions for the coming school year. We are



planning to add additional AG courses to facilitate AG completion. We will collaborate with the College Board to offer onsite locations that offer PSAT, SAT and AP testing. Students have had a difficult time taking AP tests at outside institutions and this will solve that problem. We will add credentialed teacher taught CTE courses in HSVA in addition to the CTE opportunities available through eDynamic/Edmentum and at community colleges. We will offer courses through HSVA that offer more support to the struggling student to help our CAASPP scores in English, math, and science specifically. We will offer military science and leadership courses through HSVA that will help students reach the 2-year requirement for preparedness in that area. We will Contract with Earn and Learn, an organization that facilitates internship opportunities and helps students achieve the capstone course portion of the CTE pathway, making full completion more likely. Additionally, we will continue to encourage concurrent enrollment with local community colleges and seek out opportunities to partner with local colleges to offer dual enrollment to ensure we can continue to create more opportunities for our students to meet the state college and career preparedness requirements. Lastly, we will establish a contact and relationship with the Department of Rehabilitation in order to support our students with disabilities. We will also offer college and career awareness support, services, and workshops to our students with disabilities.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
The percent of students graduating with A-G requirements fulfilled	N/A				20%
The percent of students participating in a CTE pathway	0%				10%
5% increase in the number of students who score at Approaching Prepared or Prepared level on the College and Career Indicator	The 2020 CCI results were not available due to the COVID-19 pandemic. 2021 Data will become our baseline				65%
The percentage of students passing the AP examination with a score of 3 or higher	0%				72%
The percentage of high school	N/A				95%

students graduating within 4 or 5 years					
Increase CAASPP participation rate or maintain at 95% or higher	The 2020 CAASPP assessments were waived due to the COVID-19 pandemic. 2021 Data will become our baseline				ELA- 95% Math- 95%
Increase percentage of students scoring at standard met or exceeding (level 3 or 4) on CAASPP Mathematics assessments, including all subgroups	The 2020 CAASPP assessments were waived due to the COVID-19 pandemic. 2021 Data will become our baseline				75%
Increase percentage of students scoring at standard met or exceeding (level 3 or 4) on CAASPP ELA assessments, including all subgroups	The 2020 CAASPP assessments were waived due to the COVID-19 pandemic. 2021 Data will become our baseline				75%
% of students who complete both A-G and CTE pathway	0%				10%

## Actions

Action #	Title	Description	Total Funds	Contributing
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1	Increase number of course offerings in college and career indicators	<p>We will expand course offerings and analyze student data to find where a-g completion rates drop-off and expand course offerings. This action will increase and improve services for our unduplicated groups because it will add to a current program. The action will be implemented schoolwide; however, we believe our unduplicated student groups will benefit principally because these groups are less likely to have academic support at home and the offerings will support viable skills outside of schools. Our unduplicated students will have more opportunities for post-high school career opportunities. These are the best use of funds because our data demonstrates that these students need additional support due to school closures and the pandemic there is an increase in student learning loss which we hope to mitigate with this action. Expenditures associated with this action include: For example, we will add CTE course offerings to our High School Virtual Academy. We will also add more A-G course offerings for students to be able to make progress towards A-G Completion.</p>	\$41,616	Y
2	Provide College Readiness Assessments and Preparatory Workshops	<p>To improve on the CCI indicator we will increase the number of students participating on ACT, PSAT, SAT, and AP end of course exams. Although this is a schoolwide action, we will focus our resources and staff towards our unduplicated students and students with disabilities to provide them with more opportunities, workshops, and resources to prepare for college readiness.</p>	\$0	Y
3	Partnership with Earn and Learn Organization and additional secondary support programs	<p>To increase college and career readiness, we will partner with Earn and Learn, an organization that facilitates internship opportunities. This will increase and improve services for our priority groups because it will provide an additional avenue other than a university, college, or community college to gain career exploration. An example is that Earn and Learn will provide resources to support and deepen career pathways for learners including contacts to industry, tools to organize work-based learning, and a collaborative community of peers.</p> <p>We will also be working to develop a contact and relationship with the Department of Rehabilitation to support students with disabilities.</p>	\$2,934	Y
4	Individualized Graduation Plan	<p>To improve our graduation rate and performance score we have set procedures to revamp our Individualized Graduation Plan to raise awareness among our teachers so that they understand the actions</p>	\$0	Y

that make our students classified as CCI prepared. They will be asked to choose a path that culminates in each student qualifying as prepared in a way best suited to their individual needs. We are also setting up free advisory classes, submitted to the College Board for AG credit and led by the counselor. This will assist students/families in making choices that will benefit themselves and our dashboard. We have several strategies that are foundational for the training/support offered above. This offering will contribute to CCI preparedness and is more readily accessible.

Students with disabilities will have a High School Counselor, Home School Teacher, Special Education Teacher, and parent present at their IEP to assist in developing their course of study in conjunction with their independent transition plan.

## Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As per CDE guidelines, the Goal Analysis section will be implemented in the 2022-23 LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures.

As per CDE guidelines, the Goal Analysis section will be implemented in the 2022-23 LCAP.

An explanation of how effective the specific actions were in making progress toward the goal.

As per CDE guidelines, the Goal Analysis section will be implemented in the 2022-23 LCAP.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As per CDE guidelines, the Goal Analysis section will be implemented in the 2022-23 LCAP.

**A report of the Estimated Actual Expenditures for last year's actions may be found in the Annual Update Expenditures Table.**

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2021-22]

Percentage to Increase or Improve Services	Increased Apportionment based on the Enrollment of Foster Youth, English Learners, and Low-Income students
10.07%	\$38,142

## Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

- ✓ **Goal 1: Action 1 Professional Learning related to student learning needs**, particularly for English Learners, foster youth, students who qualify for free or reduced lunch. We will provide professional learning for families and staff focused on instructional strategies as well as the importance and impacts of state testing. We are aware that certain student groups such as English Learners, foster youth, and students who qualify for free or reduced lunch are in most need of academic support. For example, we will meet with families to provide learning resources and strategies. We will also meet once a month as a Professional Learning Community as an entire staff and additionally as a smaller group to focus on professional learning.
- ✓ **Goal 1: Action 2 Professional Learning related to student learning needs, particularly for Students with Disabilities**. We will provide professional learning for families and staff focused on instructional strategies as well as the importance and impacts of state testing. We are aware that certain groups such as our Students with Disabilities are in most need of academic support. For example, we will meet with families to provide learning resources and strategies. We will also meet once a month as a Professional Learning Community as an entire staff and additionally as a smaller group to focus on professional learning. This action aligns with Feather River's Special Education Plan element 3b.
- ✓ **Goal 1: Action 3 Implement and assess formative and interim assessments**. Our dashboard shows that schoolwide our students are 27.6 points below standard for ELA and 85.9 points below standard for Math. We will implement assessments regularly to help us determine whether and to what degree students are making progress toward expected learning outcomes. We will focus on programs for students who are not demonstrating proficiency in ELA and Math from prior CAASPP and STAR 360. This action will improve services for our unduplicated groups and students with disabilities because it will add to our current program. This action will be implemented schoolwide; however, we believe our unduplicated student groups will benefit principally because these groups are less likely to have academic support at home. These are the best use of funds because our data demonstrates that these students need additional support which, as a school we will be able to closely monitor with a data driven model to focus target instruction to mitigate a potential increase in student learning loss. This action aligns with Feather River Special Education Plan Element 3c. Expenditures associated with this action include: Purchase of assessment(s) that is aligned with California State Standards in mathematics and English Language arts to monitor the progress of students who typically need the most academic support including special education and homeless subgroups

- ✓ **Goal 1: Action 5 Purchase additional technology:** We will provide mobile internet connectivity and technology for student use for connectivity at home. The goal is schoolwide and is important because most of our resources and curriculum are offered online. An example is to provide a standards-based online curriculum for our unduplicated students. Another example is providing hotspots to ensure that our unduplicated students can attend our live or synchronous classes for academic and social emotional well-being. Schoolwide, however, we know priority groups will benefit due to financial restraints of these students.
- ✓ **Goal 1: Action 6 Hire and maintain certificated staff to provide online/synchronous instruction, programs, and support.** Our dashboard shows that schoolwide our students are 27.6 points below standard for ELA and 85.9 points below standard for Math. We will hire certificated staff to expand our middle school direct instruction courses for English Language Arts and Math. Additionally, we will hire and maintain certificated staff to create online/synchronous instruction support programs for students who are not demonstrating proficiency in ELA and Math from prior CAASPP and STAR 360. This action will increase and improve services for our unduplicated groups because it will add to a current program. This action will be implemented schoolwide; however, we believe our unduplicated student groups will benefit principally because these groups are less likely to have academic support at home. These are the best use of funds because our data demonstrates that these students need additional support due to school closures and the pandemic there is an increase in student learning loss which we hope to mitigate with this action.
- ✓ **Goal 1: Action 7 Purchase of resources to support Multi-Tiered System of Support (MTSS), Student Study Team (SST), & Section 504 access, process, and compliance.** We will purchase digital and paper resources, software, and workshops to assist staff, teachers and families with student services and the processes within the department. We are aware that student services have certain documents, processes and needs associated with compliance. The purchase of these will help in streamlining the process for our schools. An example of an expenditure is for our Student Study Team and Section 504 processes, Beyond SST will promote a digital manner for making referrals, scheduling and holding meetings, creating Intervention and 504 plans as well as tracking data. Unduplicated students will benefit from the purchase of resources as some families have requested to remain off of technology, therefore the ability to purchase printed materials will accommodate and support their educational requests. This will also support child find and create a continuum of supports and services for students.
- ✓ **Goal 2: Action 1 Fund support staff for unduplicated student support.** We will fund foster/homeless youth and family liaison positions to address specific needs of unduplicated and students with disabilities including augmented communication with families to receive information and support in the appropriate language. For example, we will utilize our foster/homeless youth liaison position to partner with families to assist in meeting the educational, social, and emotional needs of students. We will also hire family liaisons who also speak another language besides English, to support our non-English speaking populations.
- ✓ **Goal 2: Action 3 Fund School Counselor/SST Coordinator.** According to our parent survey 46% of our parents who participated in the survey were concerned with their child's mental health. To support our families and provide a resource we will fund the School Counselor/SST coordinator. This position will oversee and provide social-emotional and counseling services, supports and referrals. The Coordinator will work to hold virtual SST meetings. The Counselor/SST Coordinator will offer group sessions/1:1, check in with students, lead SST meetings with a whole child perspective with Social Emotional Learning, academic, suicide risk assessment, students in crisis, dedicated time with unduplicated, collecting community-based resources for families. Although this is a schoolwide support, the position will focus on our priority group of students in need of academic intervention which includes Foster youth, low SED backgrounds, special education, and English learners. This position will provide support to students clinically and educationally. For example, counselors will address social and emotional needs of students through a variety of ways including workshops, whole group practices, small group interventions, and individualized learning activities. Another example is that our counselor will provide ongoing training and support to charter staff.

- ✓ **Goal 3: Action 1 Increase number of course offerings in college and career indicators.** From our graduation survey results we found that 65.5% of our graduates were not aware of our CTE program. Our dashboard shows that schoolwide 32.4% of our students are prepared on the college and career indicator. We will expand course offerings and analyze student data to find where a-g completion rates drop-off and expand course offerings. This action will increase and improve services for our unduplicated groups because it will add to a current program. The action will be implemented schoolwide; however, we believe our unduplicated student groups will benefit principally because these groups are less likely to have academic support at home and the offerings will support viable skills outside of schools. Our unduplicated students will have more opportunities for post-high school career opportunities. These are the best use of funds because our data demonstrates that these students are in need of additional support due to school closures and the pandemic there is an increase in student learning loss which we hope to mitigate with this action. Expenditures associated with this action include: For example, we will add CTE course offerings to our High School Virtual Academy. We will also add more A-G course offerings for students to be able to make progress towards A-G Completion.
- ✓ **Goal 3: Action 3 Partnership with Earn and Learn Organization and additional secondary support programs.** Our Dashboard shows schoolwide that our students are 32.4% prepared in CCI. To increase college and career readiness, we will partner with Earn and Learn, an organization that facilitates internship opportunities. This will increase and improve services for our priority groups because it will provide an additional avenue other than a university, college, or community college to gain career exploration. An example is that Earn and Learn will provide resources to support and deepen career pathways for learners including contacts to industry, tools to organize work-based learning, and a collaborative community of peers. We will also be working to develop a contact and relationship with the Department of Rehabilitation to support students with disabilities.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

LVCS understands the importance of equity vs. equality and how our unduplicated students require the additional support in reaching their educational goals for all our created schoolwide actions in the coming years. Our school has approximately 52.4% of our students who qualify as either foster youth, English learners, or low-income, for which we receive \$378,768 known as supplemental concentration funds as pursuant to 5 CCR 15496(a)(5). To provide the additional needed support we are increasing or improving services for our unduplicated students (Foster Youth, English Learners, and Low-Income Students) by 10.07% which is approximately \$38,142. We have planned in our LCAP as action items to specifically use these additional funds for Professional Learning, additional technology, and funds for additional staff which will help support our unduplicated student group where needed. The LCAP actions were created with the feedback from our stakeholders, parents, students, and staff ensuring we can identify the area where the additional support is required. We want to pursue being able to address and close the achievement gaps amongst all our student groups while prioritizing our unduplicated students.

## Instructions

[Plan Summary](#)

[Stakeholder Engagement](#)

[Goals and Actions](#)

[Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

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

## Introduction and Instructions

The Local Control Funding Formula (LCFF) requires LEAs to engage their local stakeholders in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have ten state priorities). LEAs document the results of this planning process in the Local Control and Accountability Plan (LCAP) using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [EC] 52064(e)(1)). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. Local educational agencies (LEAs) should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Stakeholder Engagement:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful stakeholder engagement (EC 52064(e)(1)). Local stakeholders possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.



- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
  - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (*EC 52064(b)(4-6)*).
  - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (*EC 52064(b)(1) & (2)*).
  - Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC 52064(b)(7)*).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with stakeholders that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a stakeholder engagement tool.

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 *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.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for stakeholders and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing, but also allow stakeholders to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse stakeholders and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and stakeholder engagement functions:

Given present performance across the state priorities and on indicators in the California School Dashboard, how is the LEA using its budgetary resources to respond to student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics or a set of actions that the LEA believes, based on input gathered from stakeholders, research, and experience, will have the biggest impact on behalf of its students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

## Plan Summary

### Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

### Requirements and Instructions

**General Information** – Briefly describe the students and community. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

**Reflections: Successes** – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, stakeholder input, and any 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 specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

**Reflections: Identified Need** – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the “Red” or “Orange” performance category or any local indicator where the LEA received a “Not Met” or “Not Met for Two or More Years”

rating AND (b) 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 areas of low performance and performance gaps? Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

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

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

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

## Stakeholder Engagement

### Purpose

Significant and purposeful engagement of parents, students, educators, and other stakeholders, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such stakeholder engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC 52064(e)(1)*). Stakeholder engagement is an ongoing, annual process.

This section is designed to reflect how stakeholder engagement influenced the decisions reflected in the adopted LCAP. The goal is to allow stakeholders that participated in the LCAP development process and the broader public understand how the LEA engaged stakeholders and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the stakeholder groups that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent

Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP. Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective stakeholder engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website:

<https://www.cde.ca.gov/re/lc/>.

## Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for stakeholder engagement in the LCAP development process:

### Local Control and Accountability Plan:

For county offices of education and school districts only, verify the LEA:

- a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.
- b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.
- c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.
- d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.
- e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

**Prompt 1:** “A summary of the stakeholder process and how the stakeholder engagement was considered before finalizing the LCAP.”

Describe the stakeholder engagement process used by the LEA to involve stakeholders in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required stakeholder groups as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with stakeholders. A response may also include information about an LEA's philosophical approach to stakeholder engagement.

**Prompt 2:** "A summary of the feedback provided by specific stakeholder groups."

Describe and summarize the stakeholder feedback provided by specific stakeholders. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from stakeholders.

**Prompt 3:** "A description of the aspects of the LCAP that were influenced by specific stakeholder input."

A sufficient response to this prompt will provide stakeholders and the public clear, specific information about how the stakeholder engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the stakeholder feedback described in response to Prompt 2. This may include a description of how the LEA prioritized stakeholder requests within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, "aspects" of an LCAP that may have been influenced by stakeholder input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions
- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

## Goals and Actions

### Purpose

Well-developed goals will clearly communicate to stakeholders what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to stakeholders and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

### Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

### ***Focus Goal(s)***

**Goal Description:** The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with stakeholders. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

### ***Broad Goal***

**Goal Description:** Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

### ***Maintenance of Progress Goal***

**Goal Description:** Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with stakeholders, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

**Explanation of why the LEA has developed this goal:** Explain how the actions will sustain the progress exemplified by the related metrics.

### ***Measuring and Reporting Results:***

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g. high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–2021 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g. graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric:** Indicate how progress is being measured using a metric.
- **Baseline:** Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome:** When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome:** When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome:** When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023-24:** When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.



Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023-24)
Enter information in this box when completing the LCAP for <b>2021–22</b> .	Enter information in this box when completing the LCAP for <b>2021–22</b> .	Enter information in this box when completing the LCAP for <b>2022–23</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2023–24</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2024–25</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2021–22</b> .

The metrics may be quantitative or qualitative; but at minimum, an LEA’s LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

**Actions:** Enter the action number. Provide a short title for the action. This title will also appear in the expenditure tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary expenditure tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No. (Note: for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

**Actions for English Learners:** School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.

**Actions for Foster Youth:** School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

**Goal Analysis:**

Enter the LCAP Year

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

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.
- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures. Minor variances in expenditures do not need to be addressed, and a dollar-for-dollar accounting is not required.
- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for stakeholders. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

## Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

### Purpose

A well-written Increased or Improved Services section provides stakeholders with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improved services for its unduplicated students as compared to all students and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of stakeholders to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

### Requirements and Instructions

This section must be completed for each LCAP year.

When developing the LCAP in year 2 or year 3, copy the "Increased or Improved Services" section and enter the appropriate LCAP year. Using the copy of the section, complete the section as required for the relevant LCAP year. Retain all prior year sections for each of the three years within the LCAP.

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

**Increased Apportionment based on the enrollment of Foster Youth, English Learners, and Low-Income Students:** Specify the estimate of the amount of funds apportioned on the basis of the number and concentration of unduplicated pupils for the LCAP year.

### Required Descriptions:

**For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.**

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 CCR Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether

or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

**Principally Directed and Effective:** An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7% lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])

In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action(s))

These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100% attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we

expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

**COEs and Charter Schools:** Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

## **For School Districts Only:**

### **Actions Provided on an LEA-Wide Basis:**

**Unduplicated Percentage > 55%:** For school districts with an unduplicated pupil percentage of 55% or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

**Unduplicated Percentage < 55%:** For school districts with an unduplicated pupil percentage of less than 55%, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **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.

### **Actions Provided on a Schoolwide Basis:**

School Districts must identify in the description those actions 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 actions 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 actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

**“A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.”**

Consistent with the requirements of 5 CCR Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the 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. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

## Expenditure Tables

Complete the Data Entry table for each action in the LCAP. The information entered into this table will automatically populate the other Expenditure Tables. All information is entered into the Data Entry table. Do not enter data into the other tables.

The following expenditure tables are required to be included in the LCAP as adopted by the local governing board or governing body:

- Table 1: Actions
- Table 2: Total Expenditures
- Table 3: Contributing Expenditures
- Table 4: Annual Update Expenditures

The Data Entry table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included.

In the Data Entry table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All", or by entering a specific student group or groups.

- **Increased / Improved:** Type “Yes” if the action **is** included as contributing to meeting the increased or improved services; OR, type “No” if the action is **not** included as contributing to meeting the increased or improved services.
- If “Yes” is entered into the Contributing column, then complete the following columns:
  - **Scope:** The scope of an action may be LEA-wide (i.e. districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
  - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
  - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate “All Schools”. If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter “Specific Schools” or “Specific Grade Spans”. Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades K-5), as appropriate.
- **Time Span:** Enter “ongoing” if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter “1 Year”, or “2 Years”, or “6 Months”.
- **Personnel Expense:** This column will be automatically calculated based on information provided in the following columns:
  - **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
  - **Total Non-Personnel:** This amount will be automatically calculated.
- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA’s total LCFF target (i.e. base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.

- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.

DRAFT



## Coversheet

### Public Hearing for Local Control and Accountability Plan (LCAP) and Budget Overview for Parents (BOP)

**Section:** III. Academic Excellence  
**Item:** C. Public Hearing for Local Control and Accountability Plan (LCAP) and Budget Overview for Parents (BOP)  
**Purpose:** Vote  
**Submitted by:**

**BACKGROUND:**

The Local Control and Accountability Plan (LCAP) and Budget Overview For Parents (BOP) are presented at this board meeting in a Public Hearing, as an opportunity to share input on the plans. Any input and changes will be reflected in the final plans and presented at a later meeting for approval and adoption by the Governing Board.

# Coversheet

## Benefits Package Options

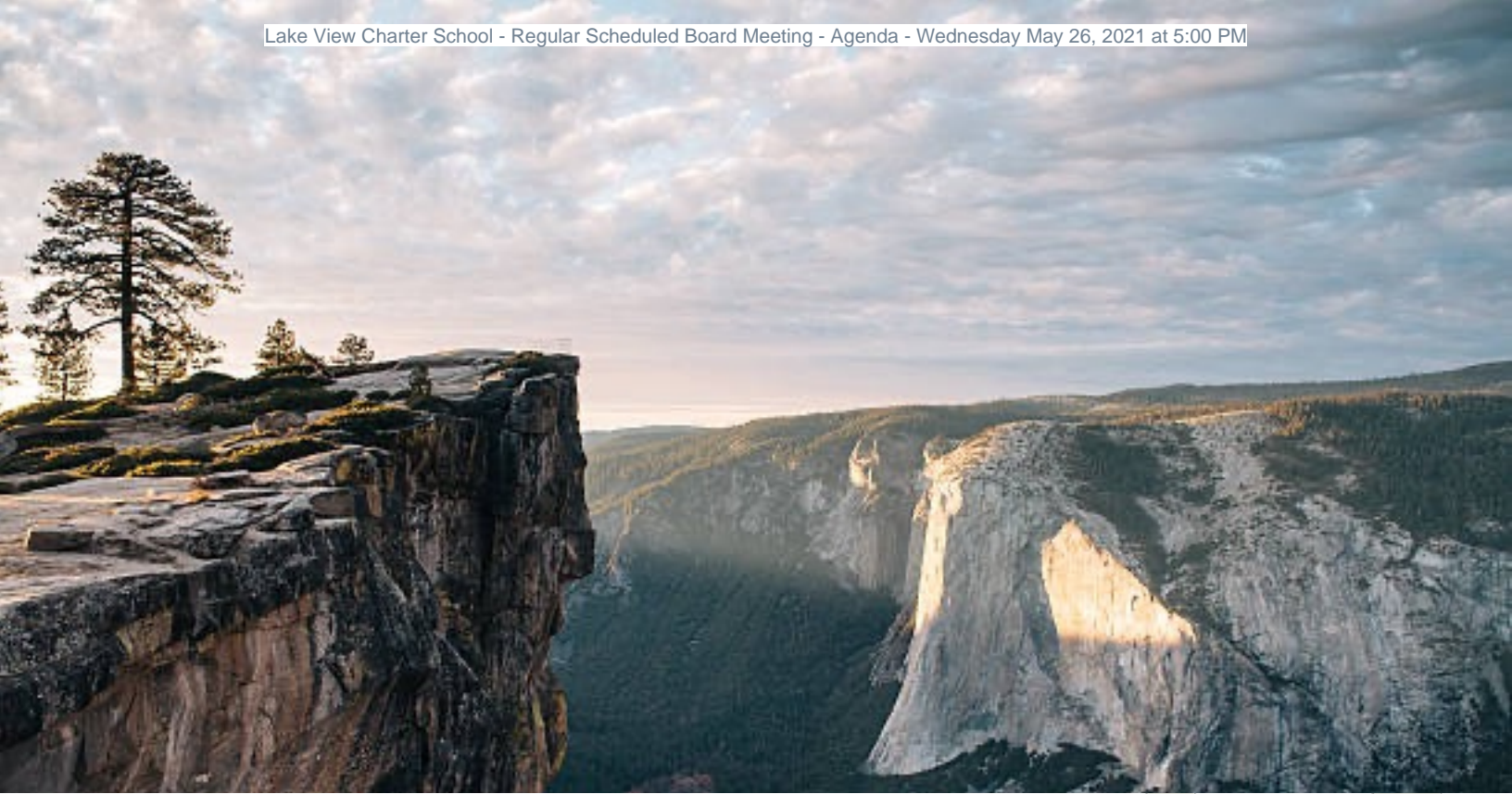
**Section:** IV. Operations  
**Item:** A. Benefits Package Options  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 2021 OE Guide - Sequoia Grove.pdf

**BACKGROUND:**

Sequoia Grove Charter Alliance has assembled a robust collection of health plans available to Clarksville Charter School staff. The Benefit Guide provides more details on plan options.

**RECOMMENDATION:**

Recommended for approval.



# SEQUOIA GROVE CHARTER ALLIANCE

## Employee Benefits Guide

July 1, 2021 –  
June 30, 2022

# Introduction & Employee Resources



## Flexible Solutions For Your Benefits Needs

We consider our employee benefits program to be one of our most important investments. Because we recognize the value our employees bring to our organization, we are committed to providing you with a complete benefits program as part of your total compensation.

This guide has been prepared to assist you in making informed decisions regarding your health insurance benefits and provide a brief overview of our overall employee benefits program.

## Gallagher Employee Support Center

Gallagher Employee Support Center (ESC) provides a dedicated team of specialized representatives ready to assist you and your dependents.

The ESC team can support you as you utilize your employee health insurance benefits. The licensed representatives will work with both providers and the insurance companies on your behalf while protecting the privacy of your healthcare information.

You can also contact the ESC if you have questions or need assistance selecting the right health insurance plan for you and your family.

### Your Employee Support Center (ESC) Supporting You With...

- Benefits Inquiry
- Claims Assistance
- Eligibility
- Materials/Forms Request
- Plan Education
- Provider Network Inquiries
- Referral/Pre-authorization

**Monday - Friday | 8am - 4pm**

**855.670.2222**

**LosAngeles.ESC@ajg.com**

Due to privacy regulations, our representatives will be required to obtain personal identifying information such as full name, contact information, address, date of birth and in some cases SSN or Member ID #. Please have this information ready. Some inquiries may require for you to provide HIPAA release in order for our advocates to work efficiently in resolving your issue with your provider or carrier.



# Eligibility & Enrollment



## New Hires/Newly Eligible for Benefits

All full-time regular and project employees who work on average at least 30 hours per week throughout the year are eligible for benefits.

Your benefits are effective 1st of the month following your date of hire. Once you have completed your new hire waiting period, you must enroll by the deadline date. If you do not enroll within that time period, you will not be eligible for benefits until the next Open Enrollment, unless you have a Qualifying Family Status Change.

## Eligible Dependents

Your eligible dependents include your legally married spouse, registered domestic partner, and children. Due to Health Care Reform, your medical, dental, and vision plans cover dependents to age 26. However, for other plans, age limits may apply.

Coverage may be available for a mentally or physically disabled child who is age 19 or older. Requirements for such coverage and documentation of disability depend on the insurance carrier. Please contact your Benefits Administrator if you believe this applies to your family.

## Open Enrollment

During Open Enrollment, you will have the opportunity to make changes to your benefit elections. You must enroll by the Open Enrollment deadline for your benefits to be effective July 1st. Except for a Qualifying Status Change, you will not be able to change your elections until the next year's Open Enrollment.

## Qualifying Status Change

If you have a qualifying family status change, you may be able to change your benefits before the next Open Enrollment. You must notify Human Resources within 30 days of the change.

### Qualifying Status Includes:

- Newly hired as full-time benefits-eligible
- Change in work schedule for you or your spouse (part-time to full-time)
- Change in employment for you, your spouse or dependent (i.e. your spouse loses their job and benefits)
- Change in marital status or dependents
- Gaining other coverage through your spouse
- Loss of other coverage for your dependent
- Change in residence causing loss of coverage
- Medicare or Medicaid entitlement for you, your spouse or dependent
- Qualified Medical Child Support Order (QMCSO)

# Easy Online Enrollment



This year, all health insurance enrollment will take place online in an interactive portal, Ease! This portal will be available to you 24/7 throughout the year. You can update your information throughout the year, as well as update your life insurance beneficiary information.

<https://sequoiagrove.ease.com>

## Step 1

Follow your email link for enrollment and select "Sign Up".

**Welcome to Ease**

Welcome Test.

Your Manager just added you to Ease.

Ease helps you manage your benefits and other important HR activities.

Please log in now and complete your profile here:

**Important:** This email is intended only for Test Employee and should not be forwarded to anyone else.

[Sign Up](#)

## Step 2

Begin your enrollment by selecting "Get Started".

**ease**

Test Employee

**Begin Enrollment**

Welcome to the team! Let's get you started with your benefits.

[Get Started](#)

## Step 3

Complete your profile.

**Profile**

Dependents

Benefits

Summary

Sign Forms

Finish

**Personal Information**

First Name \*  Middle Name

Last Name \*

Sex \*  Birth Date (29) \*

SSN \*

Marital Status \*

## Step 4

To add dependents simply select "Add Dependent".

**Dependents**

If you have any dependents (e.g. spouse, domestic partner, children) please add them here. If you do not have any dependents please click "Continue".

[Add](#)

[Continue](#)

## Step 5

Make your benefit selection checking off the icon next to the plan. Scroll down and click "Continue".

**Specify your coverage**

Select Enrolled \* or Withdrawn X for each eligible member below.

Autumn Abdurka  Enrolled  X

**Select your plan**

The cost below is the employee cost deducted on a Pay Day Deduct (Semi-Monthly) Pay

2020 Medical Opt Out  \$0.00 [Select](#)

Blue Shield of CA  \$88.97 [Select](#)

Blue Shield Access- HMO

## Step 6

To add beneficiaries select "Add Beneficiary".

**Beneficiaries**

Specify your beneficiaries for each plan type below.

Your beneficiary can be the person or persons for whom you wish to provide financial protection in the event of your death.

You can name as many beneficiaries as you want, subject to the policy. The beneficiary to whom the proceeds go first is called the primary beneficiary (required). Secondary beneficiaries (optional) are entitled to the proceeds only if they survive both you and the primary beneficiary.

If you name multiple beneficiaries, you must also specify how much each beneficiary will receive. The totals of which must add up to 100%.

If you do not want to name an individual or entity as your beneficiary, you may prefer to name your estate or a trust as your beneficiary. The proceeds will then be distributed with your other assets according to your will. If a valid, legal trust exists at the time of your death.

Name	Relationship	Primary % (Required)	Secondary % (Optional)	Est.
Kim Seifman	Wife	100%	0%	\$00
<b>Total</b>		<b>100%</b>	<b>0%</b>	

## Step 7

After selecting your plans you will then sign the electronic enrollment forms.

**IMPORTANT: CAREFULLY REVIEW YOUR FORMS**

The purpose of this online tool is to help you easily complete several different forms. It is important that you review each of these forms to make sure that they are completed accurately.

Please review the questions as asked on each form and make sure that the correct answer has been provided. While we make every effort to ensure this is done for you, we want to take the extra step to make sure that your carriers are getting the most accurate information possible.

If you find any errors, you can use the navigation at the top of your screen to return to the area where a correction needs to be made. If you are logged out of the system, you can log back to return and make changes.

Please remember to electronically sign your applications.

If you have any comments about this process, please leave feedback on the Finish section. Your input will be used to

[Continue](#)

## Step 8

Confirm your election summary by clicking "Next" and you may also print them for your records.

**Enrollment Summary**

Chris Test

Family Information

Name	Relationship	DOB	Address	Email
Chris Test	Employee	01/01/1990	123 Main St, San Francisco, CA 94102	chris@sequoiagrove.com

Beneficiary Information

Beneficiary	Plan	Beneficiary	Beneficiary	Employee Cost	Employee Cost
Kim Seifman	2020 Medical Opt Out	Blue Shield of CA	Blue Shield Access- HMO	\$0.00	\$88.97

[Next](#)

## Step 9

Select "Finish" and you have then completed the enrollment process.

**Step 7 of 7: Finish**

[Back](#) [Finish](#)

Congratulations! Your enrollment elections have been submitted for review.

Tell us how we did.

★ ★ ★ ★ ★

Additional Comments

[Submit Feedback](#)

# Benefits At A Glance



Costs Shared By You & Sequoia Grove	
Medical	<ul style="list-style-type: none"> <li>• Sutter Health HMO 20</li> <li>• Health Net SmartCare HMO 20/20%</li> <li>• Health Net PPO 1000</li> <li>• Health Net PPO HSA 2800</li> <li>• Kaiser HMO 20</li> </ul>
Dental	<ul style="list-style-type: none"> <li>• MetLife Dental HMO Plan</li> <li>• MetLife Dental PPO Low Plan</li> <li>• MetLife Dental PPO High Plan</li> </ul>
Vision	<ul style="list-style-type: none"> <li>• MetLife/VSP</li> </ul>
Benefits Provided By Sequoia Grove	
Basic Life and AD&D	<ul style="list-style-type: none"> <li>• MetLife: \$50,000 Benefit</li> </ul>
Employee Assistance Plan (EAP)	<ul style="list-style-type: none"> <li>• MetLife: 24/7 unlimited telephonic counseling services plus 5 face-to-face visits</li> </ul>
Voluntary Employee-Paid Benefits	
Supplemental Life and AD&D	<ul style="list-style-type: none"> <li>• MetLife:                             <ul style="list-style-type: none"> <li>• <u>Employee</u> coverage in increments of \$10,000 up to \$500,000 or 5 times salary (guaranteed \$100,000)</li> <li>• <u>Spouse</u> coverage in increments of \$5,000 up to \$100,000 or 50% of employee election (guaranteed \$30,000)</li> <li>• <u>Child(ren)</u> coverage under the age of 15 days is \$100, 15 days to 6 months is \$1,000 and 6 months to 26 years (full-time student) is \$1,000, \$2,000, \$4,000, \$5,000, or \$10,000 (guaranteed \$10,000)</li> </ul> </li> </ul>
Disability Benefit	<ul style="list-style-type: none"> <li>• MetLife: Short Term Disability</li> </ul>
Worksite Benefits	<ul style="list-style-type: none"> <li>• Transamerica:                             <ul style="list-style-type: none"> <li>• Accident</li> <li>• Critical Illness</li> <li>• Hospital Indemnity</li> </ul> </li> </ul>
Flexible Spending Accounts (FSA)	<ul style="list-style-type: none"> <li>• The Advantage Group                             <ul style="list-style-type: none"> <li>• <u>Health Care FSA</u>: \$2,750 maximum plan year contribution</li> <li>• <u>Dependent Care FSA</u>: \$5,000 maximum plan year contribution</li> </ul> </li> </ul>
403b Savings Plan	<ul style="list-style-type: none"> <li>• Teacher's Pension Exchange (TPX)</li> </ul>
Voluntary Pet Insurance	<ul style="list-style-type: none"> <li>• ASPCA</li> </ul>

# Employee Pay-period Contributions



Medical Coverage	Sutter HMO	Health Net HMO	Health Net PPO	Health Net PPO HSA	Kaiser HMO
Employee	\$0.00	\$97.85	\$118.07	\$0.00	\$0.00
Employee + Spouse	\$66.40	\$317.04	\$405.56	\$117.65	\$81.05
Employee + Child(ren)	\$44.35	\$215.27	\$272.08	\$86.96	\$54.03
Employee + Family	\$116.18	\$418.80	\$539.04	\$148.34	\$141.83



Dental Coverage	MetLife Dental HMO Plan	MetLife Dental PPO Low Plan	MetLife Dental PPO High Plan
Employee	\$2.63	\$10.00	\$15.00
Employee + Spouse	\$8.06	\$30.00	\$40.00
Employee + Child(ren)	\$9.87	\$35.00	\$45.00
Employee + Family	\$13.91	\$50.00	\$65.00



Vision Coverage	MetLife/VSP Vision
Employee	\$2.00
Employee + Spouse	\$4.00
Employee + Child(ren)	\$5.00
Employee + Family	\$8.00



Voluntary Coverage*	Transamerica Accident Plan	Transamerica Hospital Plan
Employee	\$6.55	\$9.77
Employee + Spouse	\$10.18	\$20.89
Employee + Child(ren)	\$8.87	\$16.18
Employee + Family	\$12.75	\$24.97

\*Rates for Voluntary Life/AD&D, Short Term Disability, and Critical Illness are based on individual age and health. Rates may vary. [Click here for more information.](#) [Powered by BoardOnTrack](#) Ease for pay-period costs.



# Medical Plan Options



## Sutter Health Plus HMO

Sutter Health Plus HMO is affiliated with the Sutter Health organization. Many of Sutter Health's hospitals, physician organizations, surgery centers, outpatient sites, urgent care centers and other health care services are available through the HMO plan. The Primary Care Physician will oversee all of your medical care. Other providers and specialists must be referred by your Primary Care Physician. You may change to a different Primary Care Physician whenever you choose.



## Health Net HMO

If you choose the Health Net HMO, you must select a primary care physician who will manage your care and refer you to a specialist when it is needed. You pay a copayment for some products and services, and there is no annual deductible.

## Health Net PPO & HSA

The PPO plan offers a network of providers who have agreed to discount their fees for their services. You may choose to have your treatment provided by a PPO provider and receive a higher level of benefit with a lower out-of-pocket cost to you. You may also choose to go outside the network; however, generally, benefits are reimbursed at a lower level and you may have higher out-of-pocket costs.



## Kaiser HMO

Kaiser Permanente operates its own facilities and hires all physicians directly. Most services are provided at little or no cost to the enrollees. Under most circumstances, you must use Kaiser facilities and physicians, although emergency care is covered when you are away from home.



# HMO Plans



WHAT YOU PAY	Sutter Network	SmartCare Network	Kaiser Network
Calendar Year Deductible (Single/Family)	None	None	None
Calendar Year Out-of-Pocket Maximum (Single/Family)	\$1,500/\$3,000	\$2,500/\$7,500	\$3,000/\$6,000
Preventive Services	No Charge	No Charge	No Charge
Office Visits (Primary/ Specialist/Telehealth)	\$20/\$20/\$20	\$20/\$40/\$0	\$20/\$20/\$0
Chiropractic/Acupuncture	\$10 (30 visits/year)	\$15 (10 visits/year)	\$15 (20 visits/year)
Fertility Services*	Not Covered	50%	50%
Lab & X-ray	Lab: \$20 X-Ray: No Charge	No Charge	\$10
Complex Radiology (Includes CT, PET and MRI)	No Charge	\$100	\$100
Inpatient Hospital Services (Includes maternity)	\$250/admit	20%	\$500/day (3-days max)
Outpatient Surgery	\$100	Facility: 10% Hospital: 20%	\$250
Urgent Care (Co-pay waived if admitted)	\$20	\$40	\$20
Emergency Room (Co-pay waived if admitted)	\$100	\$100	\$150
Ambulance	\$50	\$100	\$150
<b>PRESCRIPTION DRUGS</b>			
Calendar Year Drug Deductible	None	None	None
Retail Prescription (Tier 1/Tier 2/Tier 3/Specialty)	\$10/\$30/\$60/ 20% up to \$250 (up to 30-day supply)	\$10/\$30/\$50/ 30% up to \$250 (up to 30-day supply)	\$15/\$35/ 30% up to \$200 (generic/brand/specialty) (up to 30-day supply)
Mail-Order Prescription (Tier 1/Tier 2/Tier 3)	\$20/\$60/\$120 (up to 90-day supply)	\$20/\$75/\$125 (up to 90-day supply)	\$30/\$70/ Not Covered (generic/brand/specialty) (up to 100-day supply)

\*Fertility benefits limited to diagnosis of fertility issues and artificial insemination. Lifetime maximum benefit coverage apply. Refer to individual carrier policy for more details.

# PPO Plans



WHAT YOU PAY	PPO Plan		PPO HSA Plan	
	In-Network	Out-of-Network**	In-Network	Out-of-Network**
Calendar Year Deductible (Single/Family)	\$1,000/\$3,000	\$2,000/\$6,000	\$2,800/\$5,600	\$5,600/\$11,200
Calendar Year Out-of-Pocket Maximum (Single/Family)	\$3,000/\$9,000	\$6,000/\$18,000	\$5,000/\$10,000	\$10,000/\$20,000
Preventive Services	No Charge (deductible waived)	Not Covered	No Charge (deductible waived)	Not Covered
Office Visits (Primary/ Specialist/ Telehealth)	\$30/\$50/\$0 (deductible waived)	40%/40%/Not Covered (after deductible)	30%/30%/\$0 (after deductible)	50%/50%/Not Covered (after deductible)
Chiropractic/ Acupuncture	\$30 (deductible waived)/ 20% (after deductible)	40% (after deductible)	30%/30% (after deductible)	50% (after deductible)
Fertility Services*	50% (after deductible)	Not Covered	50% (after deductible)	50% (after deductible)
Lab & X-ray	20% (after deductible)	40% (after deductible)	30% (after deductible)	50% (after deductible)
Complex Radiology (Includes CT, PET and MRI)	20% (after deductible)	40% (after deductible)	30% (after deductible)	50% (after deductible)
Inpatient Hospital Services (Includes maternity)	20% (after deductible)	40% (after deductible)	30% (after deductible)	50% (after deductible)
Outpatient Surgery	Facility: 10% Hospital: 20% (after deductible)	40% (after deductible)	Facility: 20% Hospital: 30% (after deductible)	50% (after deductible)
Urgent Care (Co-pay waived if admitted)	\$50 (deductible waived)	40% (after deductible)	30% (after deductible)	50% (after deductible)
Emergency Room (Co-pay waived if admitted)	\$100 + 20% (after deductible)	\$100 + 20% (after deductible)	\$100 + 30% (after deductible)	\$100 + 30% (after deductible)
Ambulance	\$50 + 20% (after deductible)	\$50 + 40% (after deductible)	30% (after deductible)	30% (after deductible)
<b>PRESCRIPTION DRUGS</b>				
Calendar Year Drug Deductible	None		Medical Plan Deductible Applies	
Retail Prescription (Tier 1/Tier 2/Tier 3/Specialty)	\$10/\$30/\$50/ 30% up to \$250 (up to 30-day supply)	Retail co-pay + 50%	\$15/\$35/\$55/ 30% up to \$250 (up to 30-day supply)	Retail co-pay + 50%
Mail-Order Prescription (Tier 1/Tier 2/Tier 3)	\$20/\$75/\$125 (up to 90-day supply)	Not Covered	\$30/\$87.50/\$137.50 (up to 90-day supply)	Not Covered

\*Fertility benefits limited to diagnosis of fertility issues and artificial insemination. Lifetime maximum benefit coverage apply. Refer to individual carrier policy for more details.

\*\*Out of Network services are limited to a maximum allowed amount/fee schedule reimbursement.

# Medical Provider Search



1. Visit [www.sutterhealthplus.org](http://www.sutterhealthplus.org)
2. Click on "Find a Provider" and enter your Zip Code or City & State
3. If you know what kind of doctor you are interested in select an option from the "Primary Care Specialties" box
4. Click on the "Accepting new patients" box and then click "Search Doctors" and a list of contracted providers that are accepting new patients will be generated

**Remember:** Choosing Sutter means staying within the Sutter network, with the limited exception for an approved referral for an outside provider from your PCP.



1. Visit [www.healthnet.com](http://www.healthnet.com)
2. Click on "Find a Provider" and select a location type from the drop-down menu. Then enter your location details (city & state or zip code).
3. Under "Filter by type of Plan/Network" choose from the below:
  - For **HMO**: select "HMO - SmartCare Network Large Group"
  - For **PPO or HSA**: select "PPO - Large Group"
4. Click the type of care you are searching for (doctors, urgent cares, hospitals, etc.)

**Remember:** Provider contracts are always changing with the carrier. Please call your provider or Health Net to ensure that the provider's are still in-network before going to see them.



1. Please visit [www.kp.org](http://www.kp.org)
2. Click on "Doctors & Locations"
3. Choose the region you are searching in and enter your zip code
4. Press "Search" you will see a listing of doctors

**Remember:** Choosing Kaiser means staying within the Kaiser network, with the limited exception for an approved referral for an outside provider from your PCP.

## Looking for Chiropractic or Acupuncture Services?

- When you need chiropractic or acupuncture care under the Kaiser HMO plan, you can visit any participating provider in California from the ASH plan network without referral from your HMO PCP.
- Find an ASH Plan Participating Provider near you by calling the customer service line at 1-800-678-9133 weekdays from 5am to 6pm (PST) or visiting the website [www.ashlink.com/ash/kp](http://www.ashlink.com/ash/kp).

# Member Tools



## Sutter Member Portal & My Health Online

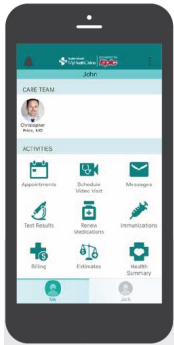
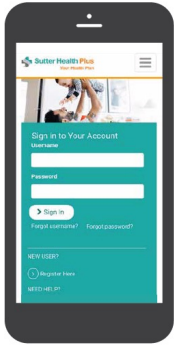


Sutter Health Plus offers a member portal for your convenience. Just visit <https://shplus.org/memberportal>, and after you register on the portal, you will have easy access from your smartphone, tablet or computer to:

- Renew prescriptions & view test results
- Pay bills and copays online
- Change your primary care physician
- Request or print member ID cards
- Access your summary of deductibles and out-of-pocket balances
- Review your benefit details and Evidence of Coverage (EOC)

You can also enroll in My Health Online (**MHO**), a convenient way to manage your health when and where you want. With MHO, it's easy to stay connected with your care team and have 24/7 access to your health information. Log in at <https://mho.sutterhealth.org>, and through the portal you can:

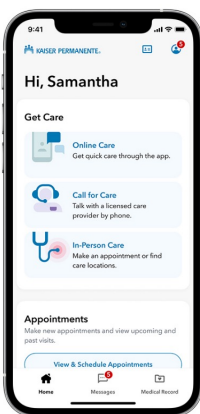
- Book a video visit & email your care team
- Make an appointment
- Sign up for text reminders



## Health Net Mobile App Health Net®

The Health Net Mobile app is the easiest way to connect to your [www.healthnet.com](http://www.healthnet.com) online account.

Once you're a registered on the Health Net member site, you can use the member app to quickly get plan, co-pay and deductible information. You can also access Provider Search and a mobile version of your Health Net ID card.



## Kaiser Mobile App & Member Portal



With the Kaiser app, keeping up with your care is quick, easy, and secure. Just download the mobile app at no cost from your preferred app site.

- Schedule or cancel routine appointments
- Email your doctor's office with non-urgent questions
- Refill most prescriptions & check most lab results
- Access a digital version of your member ID card
- View and pay bills

Register as a member through the Kaiser online portal by visiting [kp.org/registernow](http://kp.org/registernow).



# Virtual Visits



When you need care – anytime, day or night – virtual visits can be a convenient option. Talk with a doctor 24/7 about mild conditions such as flus, fevers, colds, sore throats, migraines, rashes, allergies, stomach aches, pink eye, and more.

## Sutter Video Visits – \$25 Sutter Health Plus Your Health Plan

You have access to video visits through your My Health Online (MHO) account, with same-day appointments for common and minor illnesses.



Download the MHO mobile app for the best experience using virtual care. You can also access virtual visits through your computer. Select “Schedule Video Visit” and pick a time for your visit. At the time of your appointment, log into MHO. Select your scheduled Video Visit and click “Begin Video Visit.”



For more information visit, [www.sutterhealth.org/video-visits](http://www.sutterhealth.org/video-visits).

## Health Net Care with Babylon Health – \$0 (HSA Plan: covered after deductible) Health Net®

With the Babylon app you can make a video appointment to speak face-to-face with a health care provider for non-emergency issues at any time day or night, 24/7.



1. Search & download the Babylon Health app.
2. To sign-up, enter your information and the code **HNCOM**. You must be 18 or older to sign up. If you are a parent or guardian setting up an account for a child under 18, you must sign-up first and then add the child to your account. You will also need to be present during the child's Babylon video appointment.



## Kaiser Virtual Care – \$0 KAISER PERMANENTE®

Kaiser offers phone and video appointments with your doctor, as well as 24/7 medical advice and guidance through their service team. You can even email your doctor through your Kaiser mobile app. These options are perfect for conditions such as colds, flus, allergies, sinus issues, and other mild medical needs.

### E-visits

1. Log in at [www.kp.org/appointments](http://www.kp.org/appointments) or go to Get Care on the KP mobile app
2. Answer questions online about your symptoms. Based on your answers, you'll receive treatment information or instructions.

### Telephone Appointments

1. Log in at [www.kp.org](http://www.kp.org) or the KP mobile app, or call (650) 358-7015, Monday through Friday, 7 a.m. to 7 p.m.

### Video visits

1. Call (650) 358-7015, Monday through Friday, 7 a.m. to 7 p.m. and check if a video visit is appropriate for your condition and available.



# Medical Preventive Services



The following are examples of Preventive Services covered by your policy. For a complete list of these services, please refer to your combined Evidence of Coverage and Disclosure Form. Preventive Services are covered 100%.

CHILD PREVENTIVE CARE	MEN & WOMEN'S PREVENTIVE CARE	ADULT PREVENTIVE CARE
<p><b>Screening Tests</b></p> <ul style="list-style-type: none"> <li>○ Behavioral counseling to promote a healthy diet</li> <li>○ Blood pressure</li> <li>○ Cervical dysplasia screening</li> <li>○ Cholesterol and lipid level</li> <li>○ Depression screening</li> <li>○ Type 2 diabetes screening</li> <li>○ Hearing screening</li> <li>○ Height, weight and body mass index (BMI)</li> <li>○ Hemoglobin (blood count)</li> <li>○ HPV screening</li> <li>○ Lead testing</li> <li>○ Newborn screening</li> <li>○ Screening and counseling for obesity</li> <li>○ Oral (dental health) assessment</li> <li>○ Screening and counseling for STIs</li> <li>○ Vision screening</li> </ul> <p><b>Immunizations</b></p> <ul style="list-style-type: none"> <li>○ Diphtheria, tetanus and pertussis (whooping cough)</li> <li>○ Haemophilus influenza type b</li> <li>○ Hepatitis A and Hepatitis B</li> <li>○ Human papillomavirus (HPV)</li> <li>○ Influenza</li> <li>○ Measles, mumps and rubella</li> <li>○ Meningococcal (meningitis)</li> <li>○ Pneumococcal (pneumonia)</li> <li>○ Polio</li> <li>○ Rotavirus</li> <li>○ Varicella (Chicken Pox)</li> </ul>	<p><b>Men</b></p> <ul style="list-style-type: none"> <li>○ Aortic aneurysm screening (men who have smoked)</li> <li>○ Prostate cancer</li> </ul> <p><b>Women</b></p> <ul style="list-style-type: none"> <li>○ Well-woman visits</li> <li>○ Breast cancer testing for BRCA 1 and BRCA 2 when certain criteria are met</li> <li>○ Breastfeeding: primary care intervention to promote breastfeeding support, supplies and counseling</li> <li>○ Contraceptive (birth control) counseling</li> <li>○ FDA-approved contraceptive services provided by a doctor</li> <li>○ Counseling related to chemoprevention for women with a high risk of breast cancer</li> <li>○ Counseling related to genetic testing for women with a family history of ovarian or breast cancer</li> <li>○ HPV screening</li> <li>○ Screening and counseling for interpersonal and domestic violence</li> <li>○ Pregnancy screenings: includes, but is not limited to, gestational diabetes, hepatitis, iron deficiency, anemia, and STDs</li> <li>○ Pelvic exam and Pap test, including screening for cervical cancer</li> </ul>	<p><b>Screening Tests</b></p> <ul style="list-style-type: none"> <li>○ Behavioral counseling to promote a healthy diet</li> <li>○ Blood pressure</li> <li>○ Bone density test to screen for osteoporosis</li> <li>○ Cholesterol and lipid (fat) level</li> <li>○ Colorectal cancer, including fecal occult blood test, barium enema, flexible sigmoidoscopy, screening colonoscopy and related prep kit and CT colonography (as appropriate)</li> <li>○ Depression screening</li> <li>○ Hepatitis C virus (HCV) for people at high risk for infection and a one-time screening for adults born between 1945 and 1965</li> <li>○ Type 2 diabetes screening</li> <li>○ Eye chart test</li> <li>○ Obesity</li> <li>○ STIs</li> <li>○ Tobacco use: related screening and behavioral counseling</li> <li>○ Violence, interpersonal and domestic: related screening and counseling</li> </ul> <p><b>Immunizations</b></p> <ul style="list-style-type: none"> <li>○ Diphtheria, tetanus and pertussis</li> <li>○ Hepatitis A and Hepatitis B</li> <li>○ HPV</li> <li>○ Influenza</li> <li>○ Meningitis</li> <li>○ Measles, mumps and rubella</li> <li>○ Pneumococcal</li> <li>○ Varicella (Chicken pox)</li> <li>○ Zoster (shingles)</li> </ul>



## Dental & Vision Plans



### MetLife HMO Dental

Dental HMOs are designed to help you and your family maintain oral health and reduce your out-of-pocket costs, and they're simple to use. Just select a participating (network) dentist at enrollment and refer to your Schedule of Benefits to determine your benefits for each covered service.

This type of insurance requires some type of prepayment from you. In exchange, you get dental care from a network of dental care providers. If you want to use a dentist outside the approved network, you must pay your entire dentist's bill yourself.

### MetLife PPO Dental

You may see any dentist, but you will have a higher benefit level and lower out-of-pocket costs if you visit a MetLife PPO network dentist. Savings are greater when you visit an In-Network provider because MetLife's contracted dentists have agreed to provide care at a negotiated rate.

Out of Network benefit amounts are subject to the MetLife contracted fee schedule. You will be responsible for the difference between the plan payment and the dentist's usual charge.



### MetLife/VSP Vision Care

A vision plan is one of the most requested benefit options. We are pleased to provide an affordable vision plan. The plan utilizes the VSP Choice network.

VSP has one of the largest networks of private practicing optometrists, ophthalmologists, and opticians. In addition to the vision plan benefits provided through your benefits program, VSP offers a number of non-covered services at a discount.



# Metlife Dental HMO Plan



## WHAT YOU PAY\*

Plan Maximums	
Calendar Year Deductible	None
Calendar Year Maximum Benefit	None
Preventive Procedures	
Office Visit	\$5
D1110/D1120 Cleaning Adult/Child	\$0
D0210 – D0330 X-rays & Imaging	\$0
Restorative Procedures	
D2391 White Filling (posterior)	\$25
D3330 Molar Endodontics (root canal)	\$95
D4261 Periodontal Osseous Surgery (gum disease)	\$198
D4342 Periodontal Scaling & Root Planing (gum disease)	\$19
Major Procedures	
D5110 – D5120 Complete Denture (maxillary or mandibular)	\$125
D5211 – D5212 Partial Denture (maxillary or mandibular)	\$110
D6241 Pontic (porcelain fused to a high noble metal)	\$100
D6750 Crown (porcelain fused to a high noble metal)	\$100
D7220 Surgery to remove impacted tooth (soft tissue)	\$20
Orthodontia	
Comprehensive Orthodontic Treatment (child)	\$1,450
Comprehensive Orthodontic Treatment (adult)	\$1,450

\* Please view the carrier's schedule of benefits for a more comprehensive outline.



### Key Facts:

- No plan maximum, unlimited benefit coverage
- You must make all appointments with your assigned DHMO dentist
- You must contact MetLife before the 15<sup>th</sup> of the month to change your dentist
- Always request a treatment plan before you have services done!

# Metlife Dental PPO Low Plan



## WHAT YOU PAY

In Network\*

Out Of Network\*

Plan Maximums		
Calendar Year Deductible (single/family)	\$50/\$150	\$100/\$300
Calendar Year Maximum Benefit	\$2,000 per person per calendar year	\$1,500 per person per calendar year
Preventative Procedures		
Oral Examinations, Bitewing or Full Mouth X-rays, Cleanings	0% (deductible waived)	0% (deductible waived)
Basic Procedures		
Fillings, Endodontics (root canal therapy), Periodontics, Sealants, Simple Oral Surgery and Simple Extractions	20%	20%
Major Procedures		
Crowns, Inlays, Onlays and Cast Restorations, Bridges and Dentures	50%	50%
Orthodontic Procedures		
Orthodontia	Not Covered	

*\*Reimbursement is based on PPO contracted fees for PPO dentists, and maximum allowable charges for non-MetLife dentists.*



### Key Facts:

- Free exams, cleanings, & x-rays
- Plan allowance (calendar year maximum benefit) resets every January 1
- Always request a treatment plan before you have services done!

# Metlife Dental PPO High Plan



## WHAT YOU PAY

In Network\*

Out Of Network\*

Plan Maximums		
Calendar Year Deductible (single/family)	\$0/\$0	\$100/\$300
Calendar Year Maximum Benefit	\$2,500 per person per calendar year	\$2,000 per person per calendar year
Preventative Procedures		
Oral Examinations, Bitewing or Full Mouth X-rays, Cleanings	0% (deductible waived)	0% (deductible waived)
Basic Procedures		
Fillings, Endodontics (root canal therapy), Periodontics, Sealants, Simple Oral Surgery and Simple Extractions	20%	20%
Major Procedures		
Crowns, Inlays, Onlays and Cast Restorations, Bridges and Dentures	50%	50%
Orthodontic Procedures		
Orthodontia	\$1,500 lifetime maximum benefit 50% (children & adults)	

*\*Reimbursement is based on PPO contracted fees for PPO dentists, and maximum allowable charges for non-MetLife dentists.*



### Key Facts:

- Free exams, cleanings, & x-rays
- Plan allowance (calendar year maximum benefit) resets every January 1
- Always request a treatment plan before you have services done!

# Metlife/VSP Vision



## WHAT YOU PAY

In Network

Out of Network

Exams		
Vision Exam (every 12 months)	\$10	Reimbursement up to \$45
Lenses		
Single Bifocal Trifocal (every 12 months)	\$25	Reimbursement up to: \$30 \$50 \$65
Frames		
Frames (every 12 months)	\$150 allowance, then 20% off amount over frame allowance  \$85 allowance at Costco, Walmart, Sam's Club	Reimbursement up to \$70
Contacts (In Lieu of Glasses)		
Medically Necessary (every 12 months)	\$25	Reimbursement up to \$210
Elective (every 12 months)	\$150 allowance	Reimbursement up to \$105
Contact lens exam (fitting and evaluation)	Not to exceed \$60	Not Covered



### Key Facts:

- Services are covered based on your **most recent service date**. You can have a new eye exam and purchase new lenses 12 months after your last eye exam or lens purchase. You can purchase new frames 12 months after your most recent purchase.
- Additional lens enhancements available at a co-pay or discount.
- Out of Network services may require you to make a full payment at the time or services, and submit a claim form for reimbursement.

# Dental/Vision Provider Search



1. Visit [www.metlife.com](http://www.metlife.com)
2. Under the tab "Support", click on "Find a Dentist"
3. Enter your Zip Code or City & State. You may also search for a specific dentist or dental office.
4. Choose your plan:
  1. For **Dental HMO**: select "Dental HMO/Managed Care". After you click "Find", select "Met100" from the drop down list.
  2. For **Dental PPO**: select "PDP"
5. Click on the "Accepting new patients" box and a list of contracted providers that are accepting new patients will be generated

**Remember:** If you choose the Dental HMO plan, you will need to select a primary dental provider. If you choose the Dental PPO plan, you do not need to elect a primary dental provider, but we recommend requesting pre-determination for all proposed services prior to receiving treatment to determine what the plan will cover and what your out of pocket cost will be.



1. Visit [www.metlife.com](http://www.metlife.com)
2. Under the tab "Support", click on "Find a Vision Provider"
3. Enter your Zip Code or City & State, and a list of contracted providers will be generated



## MetLife Mobile App

Find a MetLife Dental or Vision Provider and access your ID cards all in one easy-to-use app. One username and password gives you 24/7 access to your health plan information from your desktop, laptop and mobile device.



Download the mobile app today or visit [www.metlife.com](http://www.metlife.com) for more details and FAQs.



# Flexible Spending Accounts



## What is an FSA?

A Flexible Spending Account (FSA) is an account that allows you to set aside pre-tax dollars from your paycheck to use on eligible health care and dependent care expenses. You elect how much you want to contribute each year, and your employer deducts the amount from your paychecks for the plan year.

## Health Care Reimbursement FSA

The annual maximum contribution to the Health Care Reimbursement FSA is \$2,750

The Health Care Reimbursement FSA allows you to pay for certain health care services and items for you, spouse and dependents. These are items such as:

- Prescriptions
- Co-pays
- Dental & Vision care
- Certain over-the-counter items and medicines

For more information about eligible expenses, please refer to IRS Publication 502 available at [www.irs.gov/publications/p502/index.html](http://www.irs.gov/publications/p502/index.html)

## Dependent Care Reimbursement FSA

The annual maximum contribution to the Dependent Care Reimbursement FSA is \$5,000

The Dependent Care Reimbursement FSA allows you to use pre-tax dollars toward qualified dependent care. Care must be for a tax-dependent child under age 13 who lives with you, or a tax-dependent, spouse or child who lives with you and is incapable of caring for themselves. Also, the care must be needed so that you and your spouse (if applicable) can go to work. Care must be given during normal working hours and cannot be provided by another of your dependents. Typical expenses include:

- Before- and after-school care
- Day care, preschool, nursery school
- Adult day care



## “Use-It-or-Lose-It” Rule

The Health Care and Dependent Care Reimbursement FSAs run on a plan year basis. The current plan year is from July 1, 2021 through June 30, 2022; claims can only be for services/expenses incurred during the plan period. Any funds left unclaimed will be forfeited. Your employer has elected to offer a \$500 rollover option for Health Care Reimbursement, which will allow you to roll over up to \$500 of unused contributions into the next plan year. Please refer to your plan documents for additional information.



The *MyFlex* Mobile App allows you to view FSA balances and submit claims and receipts.



Have leftover funds at the end of the year? Visit [www.fsastore.com](http://www.fsastore.com) to purchase FSA-eligible items before the end of the plan year, and also review the updated FSA Eligibility list.

# Life Insurance



All benefit eligible employees are provided with employer-paid Life and Accidental Death & Dismemberment (AD&D) coverage. All eligible employees are automatically enrolled in Life and AD&D plans. This benefit is paid for 100% by your employer.

## Employee Basic Life Insurance & Accidental Death and Dismemberment (AD&D)

- Benefit amount of \$50,000
- AD&D provides 100% of the Basic Life benefit
- In the event of death that occurs from a covered accident, both Life and AD&D benefit would be payable each in the amount of the basic life insurance.

## Benefits After Age 70

Your life benefits will reduce after age 70, and the reduction schedule is as follows:

- Reduce to 70% at age 70, reduce to 40% at age 75



- Consider updating your Life Insurance beneficiary through the Ease enrollment portal.
- You may update your Life Insurance Beneficiary any time during the year as often as you would like.

As an added benefit, you may purchase Supplemental Life and Accidental Death & Dismemberment insurance for you and your dependents. This benefit is voluntary and paid for 100% by eligible employees through payroll deductions.

## Supplemental Employee Life/AD&D

Employees may purchase additional coverage in \$10,000 increments not to exceed \$500,000 or 5 times their salary. The Guaranteed Issue\* amount is \$100,000.

## Supplemental Spouse Life/AD&D

You may purchase additional coverage for your spouse in \$5,000 increments to the lesser of \$100,000 or 50% of employee coverage. The Guaranteed Issue\* amount is \$30,000.

## Supplemental Child(ren) Life/AD&D

You may purchase additional coverage for your child(ren). For children age 6 months to 26 years (if full-time student), you may purchase additional coverage of \$1,000 \$2,000, \$4,000, \$5,000 or \$10,000. For infants (birth to age 14 days), the benefit is \$100, and from age 15 days to 6 months the benefit is \$1,000.

*\*Should you choose to elect coverage outside of your initial eligibility period, or you elect coverage above the Guaranteed Issue amount, you or your spouse will need to complete the Statement of Health Form for medical underwriting purposes\**



# Employee Assistance Plan (EAP)

This benefit is paid for 100% by Sequoia Grove. There is no cost to you, the employee.  
All members of your household can utilize the benefits of this program.



All benefit eligible employees are provided with employer paid Employee Assistance Plan (EAP) through MetLife. All eligible employees are automatically enrolled in the EAP. All members of your household can utilize the benefits of this program.

Life is full of challenges and sometimes balancing it is difficult. The EAP is there when you need it. MetLife offers the appropriate assistance for a wide range of issues and provides referrals to professional counselors or services that can help you resolve emotional health, family and work issues.

- Healthy Living
- Stress Management
- Mental Health
- Diet & fitness
- Overall wellness
- Parenting support
- Child & elder care
- Learning programs
- Special needs help
- Legal issues
- Will preparation
- Taxes
- Debt
- Financial planning



Along with unlimited telephonic access, the EAP also offers 5 face-to-face visits with a counselor per person per issue. Member Services Available 24/7!

Phone: 888-319-7819

Online: [www.metliffeap.lifeworks.com](http://www.metliffeap.lifeworks.com) (username: **metliffeap** Password: **eap**)



# Voluntary Short Term Disability

This benefits is paid for 100% by the employee.



MetLife provides employees with Voluntary Short Term coverage for those unexpected situations that may keep you from performing the daily responsibilities of your job. Your disability plan is available to help supplement your income when you are not able to continue employment for a certain period of time. This benefit is voluntary and paid for 100% by eligible employees through payroll deductions.

## Elimination Period

Benefits begin after the end of the elimination period. The elimination period begins on the day you become disabled and is the length of time you must wait, while disabled, before you are eligible to receive a benefit. For injury, accident, and pregnancy, the elimination period is 7 days.

## Coverage Period

Benefits continue for as long as you are disabled up to a maximum duration of 12 weeks of Disability.

## Benefit Amount

The Short Term Disability benefit replaces a portion of your pre-disability earnings. The benefit amount is 20% of your pre-disability weekly earnings up to \$700 per week.

## Pre-Existing Condition

Employees are subject to a pre-existing condition limitation. The pre-existing condition under this plan is 3/12 which means any condition that you receive medical attention, treatment, or medication for in the 3 months prior to your effective date of coverage that results in a disability during the first 12 months of coverage, would not be covered.

## How do I submit a Short Term Disability Claim?

A completed Short Term Disability Claim is necessary for MetLife to review a claim. Please make a copy of the completed form for your records. Make sure you have provided all required information and answered all questions completely and accurately. You, your Employer, and your Attending Physician will need to provide information on this claim form.

### Submit a claim online:

<https://mybenefits.metlife.com>

- Locate Sequoia Grove and then register online.

### Start a claim over the phone:

1-800-438-6388

### Submit a paper claim form:

MetLife Group STD Claims  
P.O. Box 80826  
Lincoln, NE 68501-0826  
Phone: (800) 438-6388  
Fax: (855) 306-7350



# Voluntary Accident

This benefits is paid for 100% by the employee.



With the high cost of medical care today, a trip down the stairs can hurt your bank account as much as your body. Accident insurance can pay you money based on the injury and the treatment you receive, whether it's a simple sprain or something more serious, like an injury from a car accident.

Accident benefits pay in addition to other insurance, and can be used to help cover gaps in health insurance or other expenses if the unexpected happens. The money is paid directly to you and you decide how to spend it. This benefit is voluntary and paid for 100% by eligible employees through payroll deductions.

**Benefits:**

- Covers off-the-job accidents 24-hours per day
- Covers employee and spouses to age 65, covers children to age 26
- Family coverage is available
- Guarantee Issue: No Medical Questions asked
- Conversion Option available: you can take your policy with you if you leave your employer



Covered Conditions	24-Hour Off-Job Coverage Transamerica Accident Insurance Pays YOU
Fractures	\$420 - \$6,000
Dislocations	\$180 - \$4,800
Concussions	\$140
Lacerations	\$28 - \$420
Ambulance	\$210 - \$1,050
Emergency Care	\$150
CT/MRI/EEG Scan	\$240
Physician Follow-Up	\$50
Physical Therapy	\$50
Hospital	\$1,050 (ICU or non-ICU) per accident + Non-ICU \$150/day (up to 365 days) ICU \$450/day (up to 15 days)

*Plus many other events!*

# Voluntary Critical Illness

This benefit is paid for 100% by the employee.



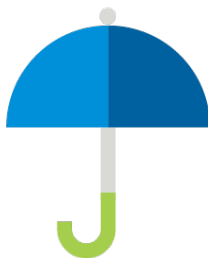
What's a critical illness? Some common examples are heart attack, stroke and cancer diagnosis. The medical treatment for these conditions can be very expensive.

Critical illness insurance with Transamerica can help by paying a lump sum payment directly to you at the first diagnosis of a covered condition. You decide how to spend it. You can use this coverage more than once for different conditions, but each condition is payable once per lifetime. This benefit is voluntary and paid for 100% by eligible employees through payroll deductions.

## Plan Highlights

- Covers employee and spouses to age 65, covers children to age 26
- Employee benefit options: \$10,000, \$20,000 or \$30,000
- Spouse benefit options: 100% of employee benefit
- Children benefit options: 100% of employee benefit
- Guarantee Issue: No Medical Questions asked
- Wellness Screening Benefit: pays \$50 when a covered person undergoes a health screening test
- Conversion Option available: you can take your policy with you if you leave your employer
- Each illness is eligible for its own payout
- No pre-existing condition limitation
- No age reduction

## Covered Conditions



- Heart Attack
- Stroke
- Major Organ Failure
- End Stage Renal Failure
- Loss of Speech
- Loss of Sight
- Coronary Artery Disease
- Cancer
- Plus many Other Conditions

# Voluntary Hospital Indemnity

This benefits is paid for 100% by the employee.

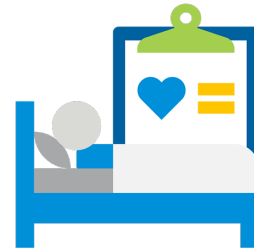


Hospital indemnity (HI) insurance pays a cash benefit if you or an insured dependent (spouse or child) are confined in a hospital for a covered illness or injury. It also provides additional daily benefits for related services. Even with the best primary health insurance plan, out-of-pocket costs from a hospital stay can add up. This benefit is voluntary and paid for 100% by eligible employees through payroll deductions.

The benefits are paid in lump sum amounts to you, and can help offset expenses that primary health insurance doesn't cover (like deductibles, co-insurance amounts or co-pays), or benefits can be used for any non-medical expenses (like housing costs, groceries, car expenses, etc.).

**Benefits:**

- Covers on- and off-the-job injury or illness, 24-hours per day
- Covers employee and spouses to age 65, covers children to age 26
- Family coverage is available
- Guarantee Issue: No Medical Questions asked
- Conversion Option available: you can take your policy with you if you leave your employer
- No pre-existing condition limitations
- Pregnancy: excluded if occurring within the first 10 months of the Covered Person's effective date of coverage
- Wellness Screening Benefit: pays \$50 when a covered person undergoes a health screening test



Covered Benefits	24-Hour On/Off-Job Coverage Transamerica Hospital Insurance Pays YOU
<b>Hospital Coverage (Accident or Sickness)</b>	
<b>Admission</b> Per member per calendar year	\$1,000
<b>Confinement</b>	Non-ICU \$100/day up to 31 days ICU \$100/day up to 30 days
<b>Pre-Existing Condition</b>	None
<b>Pregnancy</b>	Covered after 10 months
<b>Wellness Benefit</b>	\$50/person covered
<b>Conversion</b>	Included

# Transamerica Claims Processing



## Do you have what you need to file a claim?

Having all your documents together helps make submitting a claim a smoother process. Look below to see the documentation needed for each type of claim. Please include your name and Social Security number on all claims.

### Wellness

- Date wellness services were provided
- Provider's contact information
- List of services provided

### Accident, Critical Illness, and Hospital Indemnity Claim Filing Requirements

- Completed claim form
- Attending physician statement
- Itemized statement
- Discharge summary (if hospitalized)
- Police report (if applicable to the loss)

### Online (cannot be utilized for wellness claims)



1. Log in at [www.tebcs.com](http://www.tebcs.com). If you're not registered, click "New User Registration" and use your contract (certificate or policy) number and personal information, including Social Security number, to register.
2. Click on the policy you're using to file a claim.
3. Once inside the policy's contract details, click on claims, then on the specific type of claim you want to file.
4. Complete all requested information. If your claim requires a specific form, it will be provided here.
5. Print a copy of your claim submission for your records.

### Email



1. Email claim documents to: [SelfAdminClaims@transamerica.com](mailto:SelfAdminClaims@transamerica.com)
2. Include the insured's name and policy/certificate number.
3. You will receive an email acknowledgment of receipt.

### Phone



1. Contact the Transamerica Claims Customer Service Department at **855-244-8318**.
2. Be ready to provide all claim information.

### Fax



- Fax claim documents to **855-604-5205**.
- Include the insured's name and policy/certificate number.
- All documents should be clear and readable.

### Mail



- Mail completed claim documents to:  
**Transamerica – Claims, PO BOX 869090, Plano, Texas, 75075**
- Include the insured's name and policy/certificate number.

# 403b Savings Plan



We are committed to helping you save for retirement and encourage all eligible employees to take advantage of our 403(b) Retirement Savings Plan through Teacher's Pension Exchange (TPX).

Regardless of how far you may be from retirement, the sooner you start saving, the more time your money has to grow through compounding interest.

**2021 IRS Maximum Allowed Contribution:** \$19,500 (If over age 50: \$6,500 additional)

Your 403(b) contributions are all pretax, which can reduce your current-year taxable income, and you can make changes to your contribution amount at any time.

TPX offers a variety of resources to educate you about the benefits of retirement savings:

- Video Resources
- Easy to use retirement calculators
- Resource Articles
- Dedicated financial wellness consultants

Develop a retirement plan with the help  
of a financial professional!

<https://tpensions.com/sequoiagrove>

Phone: 888-498-6870  
Email: [tpx@tpensions.com](mailto:tpx@tpensions.com)

# Financial Wellness



# Immediate

Immediate is a financial wellness solution designed to improve the quality of life by smoothing out income peaks and valleys. No more need to wait until the next payday to access your earnings.

## How Immediate works

You will receive a registration email and registration code to use when downloading the app. Immediate will confirm your hours worked and wages earned and simply charge a small fee to access your wages early. You are able to access up to 50% of your earned wages, and those dollars are then deducted from your next paycheck.

Immediate is not a loan, nor does it have a payback period.

## Immediate use – step by step

It's fast and easy to sign up and start using Immediate.

### Sign up

1. Open the invitation email from: [invite@joinimmediate.com](mailto:invite@joinimmediate.com)
2. Download the **ImmediatePay** app to your mobile device
3. Enter the activation code from the invitation email
4. Verify your account with the verification code sent to your email address
5. Complete your password setup

### Set up your wallet

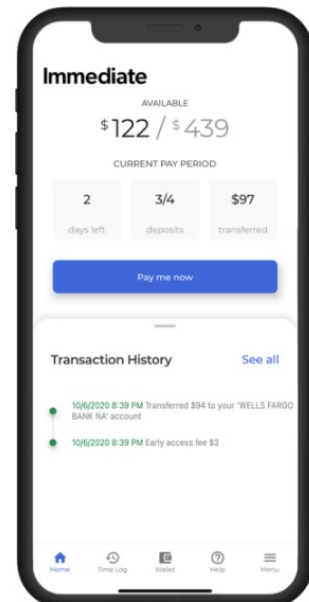
1. Open the Immediate app
2. Click "Wallet"
3. Click "+" to add your bank account

### Make a transaction

1. Click "pay me now"
2. Select the amount you want and your account
3. Click confirm



Scan to download





# Voluntary Pet Insurance

This benefit is paid for 100% by the employee.



ASPCA offers employees the ability to purchase discounted Pet Insurance. This benefit is voluntary and paid for 100% by eligible employees and paid directly to ASPCA.



## What do the plans cover?

ASPCA plans provide nose-to-tail coverage for a wide range of injuries, illnesses, genetic conditions, and emergency care for dogs and cats. Coverage is provided with no claim limits and offers unlimited lifetime benefits with an annual deductible. Multiple discounts are applied at time of rate quote with actual dollar savings presented to the pet parent. The plan co-insurance can cover up to 90% of your veterinary bills.

## How does the benefit schedule work?

Unlimited lifetime benefits are available with no caps on claims. There are some pre-existing conditions on the plans, and the plans do not cover routine care, office visits, or spay/neutering.

## How to Enroll

**Phone:** call 877-343-5314 and tell the pet insurance specialist that you're an employee of Sequoia Grove.

**Online:** visit the link below to obtain personalized rates. The rates given will include your group discount.



Refer to the ASPCA website for a complete description of this plan.

Sign up for these plans any time during the year! Visit:  
[www.aspcapetinsurance.com/SequoiaGrove](http://www.aspcapetinsurance.com/SequoiaGrove)  
Save with your priority code: EB21SequoiaGrove



# Employee Support Center



Committed to YOU.

## YOUR EMPLOYEE SUPPORT CENTER



Supporting You With...

- Benefits Inquiry
- Claims Assistance
- Eligibility
- Materials/Forms Request
- Plan Education
- Provider Network Inquiries
- Referral/Pre-authorization

...maximizing  
your benefits.

toll free

**855.670.2222**

local number

**818.539.8804**

email

[LosAngeles.ESC@ajg.com](mailto:LosAngeles.ESC@ajg.com)



Insurance | Risk Management | Consulting

# Health Insurance Marketplace



**Notice of Medical  
Coverage Options:**

## THE NEW HEALTH INSURANCE MARKETPLACE

Under federal law, beginning January 1, 2014, individuals will be required to have minimum essential health coverage, or else be subject to a penalty. This is referred to as the "individual mandate." The Health Insurance Marketplace is intended to help individuals meet the individual mandate requirement by providing another marketplace to purchase coverage, and possibly qualify for federal assistance. Individuals who have insurance through their employers (or who are eligible for insurance through their employers) may opt out of the employer plan during their renewal period and go to the Health Insurance Marketplace to purchase health insurance (note employers are not required to pass on their employer contribution towards an employee's coverage election in the Health Insurance Marketplace). Based upon your specific income level and household size, you may receive more affordable coverage for yourself and/or dependents through the Health Insurance Marketplace. Individuals who have insurance through their employers (or who are eligible for insurance through their employers) are not eligible for federal assistance through the individual mandate.

The Health Insurance Marketplace website will help people find out whether they qualify for federal financial assistance that will reduce their costs for medical coverage. Depending on your income and family size, you could be eligible for no-cost Medicare or for tax credits to help reduce your monthly premium costs. You do not need to purchase coverage through the Health Insurance Marketplace if you already have medical coverage. However, you have the option to do so if you wish.



If you have questions, please visit the  
Health Insurance Marketplace  
website at [www.Healthcare.gov](http://www.Healthcare.gov)

# Important Employee Notifications



## Model General Notice Of COBRA Continuation Coverage Rights

Introduction: You're getting this notice because you recently gained coverage under a group health plan (the Plan). This notice has important information about your right to COBRA continuation coverage, which is a temporary extension of coverage under the Plan. This notice explains COBRA continuation coverage, when it may become available to you and your family, and what you need to do to protect your right to get it. When you become eligible for COBRA, you may also become eligible for other coverage options that may cost less than COBRA continuation coverage.

The right to COBRA continuation coverage was created by a federal law, the Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA). COBRA continuation coverage can become available to you and other members of your family when group health coverage would otherwise end. For more information about your rights and obligations under the Plan and under federal law, you should review the Plan's Summary Plan Description or contact the Plan Administrator.

You may have other options available to you when you lose group health coverage. For example, you may be eligible to buy an individual plan through the Health Insurance Marketplace. By enrolling in coverage through the Marketplace, you may qualify for lower costs on your monthly premiums and lower out-of-pocket costs. Additionally, you may qualify for a 30-day special enrollment period for another group health plan for which you are eligible (such as a spouse's plan), even if that plan generally doesn't accept late enrollees.

What is COBRA continuation coverage?: COBRA continuation coverage is a continuation of Plan coverage when it would otherwise end because of a life event. This is also called a "qualifying event." Specific qualifying events are listed later in this notice. After a qualifying event, COBRA continuation coverage must be offered to each person who is a "qualified beneficiary." You, your spouse, and your dependent children could become qualified beneficiaries if coverage under the Plan is lost because of the qualifying event. Under the Plan, qualified beneficiaries who elect COBRA continuation coverage must pay for COBRA continuation coverage.

If you're an employee, you'll become a qualified beneficiary if you lose your coverage under the Plan because of the following qualifying events:

- Your hours of employment are reduced, or
- Your employment ends for any reason other than your gross misconduct.

If you're the spouse of an employee, you'll become a qualified beneficiary if you lose your coverage under the Plan because of the following qualifying events:

- Your spouse dies;
- Your spouse's hours of employment are reduced;
- Your spouse's employment ends for any reason other than his or her gross misconduct;
- Your spouse becomes entitled to Medicare benefits (under Part A, Part B, or both); or
- You become divorced or legally separated from your spouse.

Your dependent children will become qualified beneficiaries if they lose coverage under the Plan because of the following qualifying events:

- The parent-employee dies;
- The parent-employee's hours of employment are reduced;
- The parent-employee's employment ends for any reason other than his or her gross misconduct;
- The parent-employee becomes entitled to Medicare benefits (Part A, Part B, or both);
- The parents become divorced or legally separated; or
- The child stops being eligible for coverage under the Plan as a "dependent child."

# Important Employee Notifications



When is COBRA continuation coverage available?: The Plan will offer COBRA continuation coverage to qualified beneficiaries only after the Plan Administrator has been notified that a qualifying event has occurred. The employer must notify the Plan Administrator of the following qualifying events:

- The end of employment or reduction of hours of employment;
- Death of the employee; or
- The employee's becoming entitled to Medicare benefits (under Part A, Part B, or both).

For all other qualifying events (divorce or legal separation of the employee and spouse or a dependent child's losing eligibility for coverage as a dependent child), you must notify the Plan Administrator within 60 days after the qualifying event occurs. You must provide this notice to your employer.

How is COBRA continuation coverage provided?: Once the Plan Administrator receives notice that a qualifying event has occurred, COBRA continuation coverage will be offered to each of the qualified beneficiaries. Each qualified beneficiary will have an independent right to elect COBRA continuation coverage. Covered employees may elect COBRA continuation coverage on behalf of their spouses, and parents may elect COBRA continuation coverage on behalf of their children.

COBRA continuation coverage is a temporary continuation of coverage that generally lasts for 18 months due to employment termination or reduction of hours of work. Certain qualifying events, or a second qualifying event during the initial period of coverage, may permit a beneficiary to receive a maximum of 36 months of coverage.

There are also ways in which this 18-month period of COBRA continuation coverage can be extended:

1. Disability extension of 18-month period of COBRA continuation coverage: If you or anyone in your family covered under the Plan is determined by Social Security to be disabled and you notify the Plan Administrator in a timely fashion, you and your entire family may be entitled to get up to an additional 11 months of COBRA continuation coverage, for a maximum of 29 months. The disability would have to have started at some time before the 60th day of COBRA continuation coverage and must last at least until the end of the 18-month period of COBRA continuation coverage.

2. Second qualifying event extension of 18-month period of continuation coverage: If your family experiences another qualifying event during the 18 months of COBRA continuation coverage, the spouse and dependent children in your family can get up to 18 additional months of COBRA continuation coverage, for a maximum of 36 months, if the Plan is properly notified about the second qualifying event. This extension may be available to the spouse and any dependent children getting COBRA continuation coverage if the employee or former employee dies; becomes entitled to Medicare benefits (under Part A, Part B, or both); gets divorced or legally separated; or if the dependent child stops being eligible under the Plan as a dependent child. This extension is only available if the second qualifying event would have caused the spouse or dependent child to lose coverage under the Plan had the first qualifying event not occurred.

Are there other coverage options besides COBRA Continuation Coverage?: Yes. Instead of enrolling in COBRA continuation coverage, there may be other coverage options for you and your family through the Health Insurance Marketplace, Medicaid, or other group health plan coverage options (such as a spouse's plan) through what is called a "special enrollment period." Some of these options may cost less than COBRA continuation coverage. You can learn more about many of these options at [www.healthcare.gov](http://www.healthcare.gov).

# Important Employee Notifications



If you have questions: Questions concerning your Plan or your COBRA continuation coverage rights should be addressed to the contact or contacts identified below. For more information about your rights under the Employee Retirement Income Security Act (ERISA), including COBRA, the Patient Protection and Affordable Care Act, and other laws affecting group health plans, contact the nearest Regional or District Office of the U.S. Department of Labor's Employee Benefits Security Administration (EBSA) in your area or visit [www.dol.gov/ebsa](http://www.dol.gov/ebsa). (Addresses and phone numbers of Regional and District EBSA Offices are available through EBSA's website.) For more information about the Marketplace, visit [www.healthcare.gov](http://www.healthcare.gov).

Keep your Plan informed of address changes: To protect your family's rights, let the Plan Administrator know about any changes in the addresses of family members. You should also keep a copy, for your records, of any notices you send to the Plan Administrator.

## Women's Health and Cancer Rights Act of 1998 (WHCRA)

If you have had or are going to have a mastectomy, you may be entitled to certain benefits under the Women's Health and Cancer Rights Act of 1998 (WHCRA). For individuals receiving mastectomy related benefits, coverage will be provided in a manner determined in consultation with the attending physician and the patient, for:

- All stages of reconstruction of the breast on which the mastectomy was performed;
- Surgery and reconstruction of the other breast to produce a symmetrical appearance;
- Prostheses; and
- Treatment of physical complications of the mastectomy, including lymphedema.

These benefits will be provided subject to the same deductibles and coinsurance applicable to other medical and surgical benefits provided under this plan.

Contact your Benefits Administrator for more information.

## Newborns' and Mothers' Health Protection Act of 1996

Group health plans and health insurance issuers generally may not, under Federal law, restrict benefits for any hospital length of stay in connection with childbirth for the mother or newborn child to less than 48 hours following a vaginal delivery, or less than 96 hours following a cesarean section. However, Federal law generally does not prohibit the mother's or newborn's attending provider, after consulting with the mother, from discharging the mother or her newborn earlier than 48 hours (or 96 hours as applicable). In any case, plans and issuers may not, under Federal law, require that a provider obtain authorization from the plan or the insurance issuer for prescribing a length of stay not in excess of 48 hours (or 96 hours).

## Extension of Dependent Coverage to Age 26

Individuals whose coverage ended, or who were denied coverage (or were not eligible for coverage), because the availability of dependent coverage of children ended before attainment of age 26 are eligible to enroll in Sutter Health Plus and Kaiser. Individuals may request enrollment for such children for 30 days from the date of notice. Enrollment will be effective retroactively to July 1, 2021.

For more information, contact Sutter Health Plus, Health Net, and Kaiser.

## Notice of Special Enrollment Rights

If you are declining enrollment for yourself or your dependents (including your spouse) because of other health insurance or group health plan coverage, you may be able to enroll yourself and your dependents in this plan if you or your dependents lose eligibility for that other coverage (or if the employer stops contributing toward your or your dependents' other coverage). However, you must request enrollment within 30 days after your or your dependents' other coverage ends (or after the employer stops contributing toward the other coverage). In addition, if you have a new dependent as a result of marriage, birth, adoption, or placement for adoption, you may be able to enroll yourself and your dependents. However, you must request enrollment within 30 days or any longer period that applies under the plan after the marriage, birth, adoption, or placement for adoption. To request special enrollment or obtain more information, contact your Benefits Administrator.

# Important Employee Notifications



## Lifetime Limit No Longer Applies and Enrollment Opportunity

The lifetime limit on the dollar value of benefits under Sutter Health Plus, Health Net, and Kaiser no longer applies. Individuals whose coverage ended by reason of reaching a lifetime limit under the plan are eligible to enroll in the plan. Individuals have 30 days from the date of this notice to request enrollment.

For more information, contact Sutter Health Plus, Health Net, and Kaiser.

## Primary Protection

Sutter Health Plus and Health Nety generally requires the designation of a primary care provider. You have the right to designate any primary care provider who participates in our network and who is available to accept you or your family members. Until you make this designation, Sutter Health Plus designates one for you. For information on how to select a primary care provider, and for a list of the participating primary care providers, contact Sutter Health Plus and Health Net.

## Medicaid and the Children's Health Insurance Program (CHIP) Offer Free Or Low-Cost Health Coverage To Children And Families

If you or your children are eligible for Medicaid or CHIP and you're eligible for health coverage from your employer, your state may have a premium assistance program that can help pay for coverage, using funds from their Medicaid or CHIP programs. If you or your children aren't eligible for Medicaid or CHIP, you won't be eligible for these premium assistance programs but you may be able to buy individual insurance coverage through the Health Insurance Marketplace. For more information, visit [www.healthcare.gov](http://www.healthcare.gov).

If you or your dependents are already enrolled in Medicaid or CHIP, contact your State Medicaid or CHIP office to find out if premium assistance is available.

If you or your dependents are NOT currently enrolled in Medicaid or CHIP, and you think you or any of your dependents might be eligible for either of these programs, contact your State Medicaid or CHIP office or dial **1-877- KIDS NOW** or [www.insurekidsnow.gov](http://www.insurekidsnow.gov) to find out how to apply. If you qualify, ask your state if it has a program that might help you pay the premiums for an employer-sponsored plan.

If you or your dependents are eligible for premium assistance under Medicaid or CHIP, as well as eligible under your employer plan, your employer must allow you to enroll in your employer plan if you aren't already enrolled. This is called a "special enrollment" opportunity, and **you must request coverage within 60 days of being determined eligible for premium assistance**. If you have questions about enrolling in your employer plan, contact the Department of Labor at [www.askebsa.dol.gov](http://www.askebsa.dol.gov) or call **1-866-444-EBSA (3272)**.

## Out of Network Balance Billing

The amount the plan pays for covered services provided by non-network providers is based on a maximum allowable amount for the specific service rendered. Although your plan stipulates an out-of-pocket maximum for out of network services, please note the maximum allowed amount for an eligible procedure may not be equal to the amount charged by your out of network provider. Your out of network provider may bill you for the difference between the amount charged and the maximum allowed amount. This is called balance billing and the amount billed to you can be substantial. The out-of-pocket maximum outlined in your policy will not include amounts in excess of the allowable charge and other non-covered expenses as defined by your plan. The maximum reimbursable amount for non network providers can be based on a number of schedules such as a percentage of reasonable and customary or a percentage of Medicare. Contact your claims payer or insurer for more information. The plan document or carrier's master policy is the controlling document, and this Benefit Highlight does not include all of the terms, coverage, exclusions, limitations, and conditions of the actual plan language.

# Important Employee Notifications



## Prescription Drug Coverage and Medicare Part D

Please read this notice carefully and keep it where you can find it. This notice has information about your current prescription drug coverage with Sequoia Grove and about your options under Medicare's prescription drug coverage. This information can help you decide whether or not you want to join a Medicare drug plan. If you are considering joining, you should compare your current coverage, including which drugs are covered at what cost, with the coverage and costs of the plans offering Medicare prescription drug coverage in your area. Information about where you can get help to make decisions about your prescription drug coverage is at the end of this notice.

There are two important things you need to know about your current coverage and Medicare's prescription drug coverage:

1. Medicare prescription drug coverage became available in 2006 to everyone with Medicare. You can get this coverage if you join a Medicare Prescription Drug Plan or join a Medicare Advantage Plan (like an HMO or PPO) that offers prescription drug coverage. All Medicare drug plans provide at least a standard level of coverage set by Medicare. Some plans may also offer more coverage for a higher monthly premium.
2. Sequoia Grove has determined that the prescription drug coverage offered by Sutter Health Plus, Health Net, and Kaiser is, on average for all plan participants, expected to pay out as much as standard Medicare prescription drug coverage pays and is therefore considered Creditable Coverage. Because your existing coverage is Creditable Coverage, you can keep this coverage and not pay a higher premium (a penalty) if you later decide to join a Medicare drug plan.

**When Can You Join A Medicare Drug Plan?** You can join a Medicare drug plan when you first become eligible for Medicare and each year from October 15th to December 7th.

However, if you lose your current creditable prescription drug coverage, through no fault of your own, you will also be eligible for a two (2) month Special Enrollment Period (SEP) to join a Medicare drug plan.

**What Happens To Your Current Coverage If You Decide To Join A Medicare Drug Plan?** If you decide to join a Medicare drug plan, your current Sequoia Grove coverage may be affected.

If you decide to join a Medicare drug plan and drop your current Sequoia Grove coverage, be aware that you and your dependents may not be able to get this coverage back.

**When Will You Pay A Higher Premium (Penalty) To Join A Medicare Drug Plan?** You should also know that if you drop or lose your current coverage with Sequoia Grove and don't join a Medicare drug plan within 63 continuous days after your current coverage ends, you may pay a higher premium (a penalty) to join a Medicare drug plan later.

If you go 63 continuous days or longer without creditable prescription drug coverage, your monthly premium may go up by at least 1% of the Medicare base beneficiary premium per month for every month you did not have that coverage. For example, if you go nineteen months without creditable coverage, your premium may consistently be at least 19% higher than the Medicare base beneficiary premium. You may have to pay this higher premium (a penalty) as long as you have the Medicare prescription drug coverage. In addition, you may have to wait until the following October to join.

**For More Information About This Notice Or Your Current Prescription Drug Coverage:** Contact the person listed below for further information. Note: you will get this notice each year. You will also get it before the next period you can join a Medicare drug plan, and if this coverage through Sequoia Grove changes. You may also request a copy of this notice at any time.

# Important Employee Notifications



For More Information About Your Options Under Medicare Prescription Drug Coverage: More detailed information about Medicare plans that offer prescription drug coverage is in the “Medicare & You” handbook. You will receive a copy of the handbook in the mail every year from Medicare. You may also be contacted directly by Medicare drug plans. Additional resources: [www.medicare.gov](http://www.medicare.gov). Call your State Health Insurance Assistance Program (see the inside back cover of your copy of the “Medicare & You” handbook for their telephone number) for personalized help; Call **1-800-663-4227 (TTY 1-877-486-2048)**. If you have limited income and resources, extra help paying for Medicare prescription drug coverage is available. For information about this extra help, visit Social Security on the web at [www.socialsecurity.gov](http://www.socialsecurity.gov), or call them at **1-800-772-1213 (TTY 1-800-325-0778)**.

Am I eligible for Medicare if I am under 65? There are three ways you can get Medicare coverage if you are under 65 years of age.

1. You are eligible for Medicare if you are a U.S. citizen or have your resident visa, have lived in the U.S. for five years in a row, and you have a disability and have been receiving Social Security Disability Insurance (SSDI) for more than 24 months. Your eligibility begins during the month you receive your 25th SSDI check. You do not need to contact anyone. Social Security should automatically mail you your Medicare card three months before you become eligible.

**Note:** If you are receiving railroad disability annuity checks, whether you are eligible for Medicare and when you get it, depends on how your disability has been classified by the Railroad Retirement Board.

OR

2. You have been diagnosed with End-Stage Renal Disease (ESRD) and you are getting dialysis treatments or have had a kidney transplant; apply for Medicare benefits (up to 12 months retroactively); and you
  - are eligible to receive SSDI;
  - are eligible to receive railroad retirement benefits; or
  - are otherwise considered to be fully insured by Social Security, as defined by the length of time you have worked and the amount of money you have made (you need a certain amount of Social Security work credits depending on how long you have worked).

**Note:** If you are a railroad worker with ESRD, you must contact Social Security, not the Railroad Retirement Board, to find out if you are eligible for Medicare because you have been diagnosed with ESRD. When your Medicare benefits begin depends on the circumstance.

OR

3. You have been diagnosed with Amyotrophic Lateral Sclerosis (ALS), commonly known as Lou Gehrig's Disease. You will automatically be enrolled in Medicare the first month you receive SSDI or, if you are a railroad worker, the first month you receive a railroad disability annuity check.

**Note:** Because Social Security and Medicare eligibility rules are complex, you should call Social Security at **800-772-1213** to get the most accurate information regarding your particular situation.

**Date:** July 1, 2021  
**Name of Entity/Sender:** Human Resources  
**Address:** 4305 South Meridian Road, Meridian CA 95957  
**Phone Number:** (530) 285-2578

*This proposal (analyses, report, etc.) is an outline of the coverages proposed by the carrier(s) based upon the information provided by your company. It does not include all the terms, coverages, exclusions, limitations, and conditions of the actual contract language. See the policies and contracts for actual language. This proposal (analyses, report, etc.) is not a contract and offers no contractual obligation on behalf of Gallagher Benefit Services (GBS). Policy forms for your reference will be made available upon request.*



# Notes



# Benefit Plan Contact Information



Provider	Coverage Type	Phone and Web
 <b>Sutter Health Plus</b> Your Health Plan	Medical	Sutter Health Plus 855-315-5800 <a href="http://www.sutterhealthplus.org">www.sutterhealthplus.org</a>
 <b>Health Net</b>	Medical	Health Net 800-522-0088 <a href="http://www.healthnet.com">www.healthnet.com</a>
 <b>KAISER PERMANENTE</b>	Medical	Kaiser 800-464-4000 <a href="http://www.kp.org">www.kp.org</a>
 <b>MetLife</b>	Dental Vision Life/AD&D (Basic & Voluntary) Voluntary Short Term Disability	MetLife 800-438-6388 <a href="http://www.metlife.com">www.metlife.com</a>
 <b>MetLife</b>	Employee Assistance Plan (EAP)	MetLife 888-319-7819 <a href="http://www.metliffeap.lifeworks.com">www.metliffeap.lifeworks.com</a> Username: metliffeap Password: eap
 <b>TRANSAMERICA</b>	Voluntary Accident Voluntary Critical Illness Voluntary Hospital	Transamerica 855-244-8318 <a href="mailto:SelfAdminClaims@transamerica.com">SelfAdminClaims@transamerica.com</a> <a href="http://www.TEBCS.com">www.TEBCS.com</a>
 <b>THE ADVANTAGE GROUP</b>	Flexible Spending Account (FSA)	The Advantage Group (TAG) 877-506-1660 <a href="http://www.enrollwithtag.com">www.enrollwithtag.com</a>
 <b>ASPCA</b> PET HEALTH INSURANCE PETS ARE DEPENDENTS, TOO.	Voluntary Pet Insurance	ASPCA 877-343-5314 <a href="http://www.aspcapetinsurance.com/SequoiaGrove">www.aspcapetinsurance.com/SequoiaGrove</a>

**Employee Support Center**  
Call 855.670.2222  
Monday - Friday | 8am - 4pm  
[LosAngeles.ESC@ajg.com](mailto:LosAngeles.ESC@ajg.com)



# Coversheet

## Teacher Induction Program and Policy

**Section:** IV. Operations  
**Item:** B. Teacher Induction Program and Policy  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Teacher Induction Policy - Lake View.pdf

**BACKGROUND:**

Teacher Induction Program and Policy as presented denotes the discontinuance of the Feather River Charter School's Teacher Induction Program. In exchange, staff recommends providing reimbursement for up to \$2000 to candidates.

**RECOMMENDATION:**

Recommended for approval.



## Teacher Induction Policy

The Governing Board of Lake View Charter School (the “Charter School”) committed to providing a high-quality educational program is dependent upon the employment of certificated staff who are adequately prepared and have demonstrated proficiency in basic skills and in the subject matter to be taught.

The purpose of the Lake View Charter School Governing Board approving this Teacher Induction Policy **and Program** is to accomplish the following:

1. Outline the California Credentialing System
  2. **Establish School reimbursement of Teacher Induction Policy**
  3. **Lake View Charter School discontinuing internal Teacher Induction Policy**
  - ~~4. Outline the Induction Program~~
  - ~~5. Establish the Individual Learning Plan of a Participating Teacher~~
  - ~~6. Establish an Early Completion Option~~
  - ~~7. Outline the Qualifications, Selection and Training of Coaches~~
  - ~~8. Outline the Selection of Participating Teachers~~
  - ~~9. Outline Participating Teacher Competence for the Clear Credential Recommendation~~
1. **California Credentialing System:** California has a two-tiered credentialing system for teachers. Preliminary programs prepare candidates to obtain an initial teaching credential through successful completion of required coursework, fieldwork, and a performance demonstration of their knowledge, skills, and abilities. The second tier of preparation is a two-year job-embedded individualized induction program that is focused on extensive support and mentoring to new teachers in their first and second year of teaching. Lake View Charter School’s induction program is designed to provide a two-year, individualized, job-embedded system of mentoring, support and professional learning that begins in the teacher’s first year of teaching.
  2. **Lake View Charter School Reimbursement:** LVCS will reimburse a LVCS teacher up to \$2000, as a reimbursement for costs associated with enrollment in the Teacher Induction Program. Upon completion of year one and year two, the LVCS Teacher will provide documentation of completion of the program to submit for reimbursement. Maximum amount of reimbursement is \$1000 a year. Prior approval for Teacher Induction reimbursement may be granted with Executive Director approval.
  3. **Lake View Charter School Teacher Induction Program Discontinuance:** LVCS will discontinue offering an internal Teacher Induction Program. Teachers will enroll in a third party program to complete their Teacher Induction.
  - ~~4. **Induction Program Generally:** The Lake View Charter School’s Induction program is a two-year program that is free of charge to participating teachers. Within the first 30 days of the participant’s enrollment in the Lake View Charter School’s Induction program, the Lake~~

~~View Charter School shall identify and assign an Induction coach to each participating teacher. The coach and participating teacher match is made according to the credentials held, grade level and/or subject area, as appropriate to the participating teacher's employment.~~

~~Each participating teacher shall receive an average of not less than one hour per week of individualized support and mentoring coordinated and/or provided by the coach.~~

- ~~5. **Individual Learning Plan:** Within the first 60 days of the participating teacher's enrollment in the induction program, goals for each participating teacher must be developed within the context of the Individual Learning Plan ("ILP"). The ILP shall be designed and implemented only for the professional growth and development of the participating teacher and not for evaluation for employment purposes.~~

~~The ILP is developed based on needs determined by the teacher and program provider, in consultation with the site administrator and guided by the Preliminary Program Transition Plan. The ILP must address identified candidate competencies that support the recommendation for the credential. Coaching support for participating teachers must include both "just in time" and longer term analysis of teaching practice to help candidates develop enduring professional skills. The program's design shall serve to strengthen the participating teacher's professional practice and contribute to the participating teacher's retention in the profession.~~

~~The ILP must address the *California Standards for the Teaching Profession* and provide the road map for the participating teachers' induction work during their time in the program along with guidance for the coach in providing support. The ILP must be collaboratively developed at the beginning of the Induction by the participating teacher and coach, with input from the Lake View Charter School regarding the participating teacher's job assignment, and guidance from the program staff.~~

~~The ILP It must include the following:~~

- ~~● Candidate professional growth goals~~
- ~~● A description of how the participating teacher will meet those goals~~
- ~~● Defined and measurable outcomes for the participating teacher~~
- ~~● Planned opportunities to reflect on progress and modify the ILP as needed~~

- ~~6. **Early Completion Option:** The Lake View Charter School shall make available and advise participants of an early completion option for "experienced and exceptional" candidates who meet the program's established criteria. In order to qualify for the early completion option, participating teachers must be in year one of the Induction program, have five years of verified superior teaching experience, and have a letter of recommendation from their Regional Coordinator, Program Specialist or Senior Director.~~

- ~~7. **Qualifications, Selection and Training of Coaches:** The Induction program assigns qualified coaches and provides guidance and clear expectations for the coaching experience based on the program's design. Qualifications for coaches shall include the following:~~

- ~~● Knowledge of the context and content area of the participating teacher's assignment~~
- ~~● Demonstrated commitment to professional learning and collaboration~~
- ~~● Possession of a Clear Teaching Credential~~
- ~~● Ability, willingness, and flexibility to meet candidate needs for support~~
- ~~● Minimum of three years of effective teaching experience~~

~~Coaches are required to provide “just in time” support for candidates, in accordance with the ILP, along with longer-term guidance to promote enduring professional skills. Coaches facilitate participating teacher growth and development through modeling, guided reflection on practice and feedback on classroom instruction. The coaches connect participating teachers with available resources to support their professional growth and accomplishment of the ILP.~~

~~Coaches will be provided ongoing training and support that includes two required trainings with Center for Teacher Innovation (Coach Preview and Induction Orientation), coaching and mentoring, goal setting, use of appropriate mentoring instruments, best practices in adult learning, support for individual coaching challenges, reflection on coaching practice and opportunities to engage with coaching peers in professional learning networks, and program processes designed to support participating teacher growth and effectiveness.~~

~~Coaches may carry up to 2 participating teachers per year and must have a credential that matches that of the participating teacher(s). Coaches will receive One Thousand Dollars (\$1,000.00) per year paid out in equal amounts (less required deductions) over a ten (10) month period. If a coach leaves the employ of Lake View Charter School before the end of the ten (10) month period, the coach is not entitled to any unpaid amounts if the coach has not completed his/her coaching obligations.~~

~~8. **Selection of Participating Teachers:** Each candidate is reviewed in the Commission on Teacher Credentialing database for credential verification and reviewed for early completion option eligibility.~~

~~9. **Participating Teacher Competence for the Clear Credential Recommendation:** The Induction program shall assess the participating teacher’s progress towards mastery of the *California Standards for the Teaching Profession* to support the recommendation for the clear credential. The documentation of participating teacher progress must reflect the learning and professional growth goals indicated within the ILP and evidence of the participating teacher’s successful completion of the activities outlined in the ILP.~~

~~Prior to recommending a candidate for a Clear Credential, the Lake View Charter School must verify that the participating teacher has satisfactorily completed all program activities and requirements, and that the program has documented the basis on which the recommendation for the clear credential is made. The Lake View Charter School’s verification is based on a review of observed and documented evidence, collaboratively assembled by the participating teacher, the coach and/or other colleagues, according to the program’s design.~~

~~As part of the Induction program’s recommendation verification process also includes a systematic process of reviewing documentation. If a participating teacher is not recommended for a Clear Credential, the participating teacher may rewrite or expand the reflection, revisit the context and illustrate a better understanding of the context and/or next steps. Alternatively, the participating teacher may complete a written appeal form available from [insert title of person] providing additional evidence, as that participating teacher feels is appropriate. In the discretion of the Induction Program, a participating teacher may repeat portions of the program.~~

# Coversheet

## Employee Handbook 2021-2022

**Section:** IV. Operations  
**Item:** C. Employee Handbook 2021-2022  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** SGCA Employee Handbook 2021-2022,v.1.docx.pdf

**BACKGROUND:**

This is the annual approval of the Employee Handbook. Changes for this include expense reimbursement policy, the residency of staff, and Title IX reporting procedure.



# SEQUOIA GROVE CHARTER ALLIANCE

## Employee Handbook

July 1, 2021 –  
June 30, 2022





## Welcome to **Sequoia Grove Charter Alliance**

Welcome to Clarksville Charter School, Feather River Charter School, Lake View Charter School, and Winship Community Schools, Members of the Sequoia Grove Charter Alliance! Herein below, "your School" is defined as the charter school in which you are contractually employed.

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

This handbook has been written to provide you with an overview of our Schools, its personnel policies and procedures, and your benefits as an employee.

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

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

We welcome you and wish you great success and fulfillment at your School.

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## SECTION 1 – GENERAL

This handbook has been written to serve as a guide for the employer/employee relationship. This handbook applies to faculty and staff at your School. This handbook contains only general information and guidelines. It is not intended to be comprehensive or to address all the possible applications of, or exceptions to, the general policies and procedures described. For that reason, if you have any questions concerning eligibility for a particular benefit, or the applicability of a policy or practice to you, you should address your specific questions to your supervisor or Human Resources. You are responsible for reading, understanding, and complying with the provisions of this handbook. Our objective is to provide you with a work environment that is constructive to both personal and professional growth.

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

No supervisor or other representative of your School except the Executive Director or designee, with the approval of the Board of Directors, has the authority to enter into any agreement for employment for any specified period of time, or to make any agreement contrary to the above. Further, the procedures, practices, policies and benefits described herein may be modified or discontinued from time to time with or without advance notice. We will try to inform you of any changes as they occur. Up to date policies are found in the Schools' governing board websites.

## SECTION 2 – PHILOSOPHY

### CORE PURPOSE

Your School exists to educate and inspire children to realize their potential to become extraordinary and active members of society.

### CORE VALUES

The following three core values are what distinguish your School from other schools:

- Mentoring – to inspire students to forge their paths in the world
- Passionate – to strive for excellence
- Collaborative – to be active, engaging, and contributing team members

### PERMISSION-TO-PLAY VALUES

The following Permission-to-Play values are minimum behavioral standards that all employees must exhibit consistently:

- Innovative
- Dynamic
- Results-oriented
- Data-driven
- Extraordinary
- Confident
- Energetic

### STRATEGIC ANCHORS

To ensure success of our core purpose and core values, your School will use the following two strategic anchors to inform every decision the School makes and the basis for how decisions and actions will be evaluated:

- Academic achievement through relevant curricula, clear expectations, and shared accountability
- Relationship building through mentorship and consistent communication

## Schoolwide ..... Learner Outcomes



	<p><i>Our students are...</i></p>
	<p><i>Navigators of the Digital World</i> Proficient in the use of technology, media, and online resources</p>
	<p><i>Self-Directed and Motivated</i> Able to set attainable goals to achieve academic success</p>
	<p><i>Personalized Learners</i> Thriving in the education style that best fits their individual needs</p>
	<p><i>Independent Critical-Thinkers</i> Able to problem-solve, take ownership, and apply their knowledge</p>
	<p><i>Responsible Citizens</i> Actively seeking knowledge of local and global issues</p>
	<p><i>Effective Communicators</i> Articulating their thinking with confidence</p>

## SECTION 3 – EMPLOYMENT

### EMPLOYMENT APPLICATIONS

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

### EQUAL EMPLOYMENT OPPORTUNITY

Your School is an equal opportunity employer. In accordance with applicable law, your School prohibits discrimination, harassment, intimidation, and bullying based on actual or perceived ancestry, age, color, disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sex, sexual orientation, actual or potential parental, family, marital status, or association with a person or a group with one or more of these actual or perceived characteristics. Your School will ensure that applicants and employees are treated in all aspects of employment without unlawful discrimination because of these or any other protected basis. Such aspects of employment include, but are not limited to, recruitment, hiring, promotion, demotion, transfer, layoff, termination, compensation, and training. Additionally, in accordance with applicable law, your School prohibits all forms of unlawful harassment of a sexual or other discriminatory nature. Any conduct contrary to this policy is prohibited. This policy applies to all applicants and employees of your School.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, your School will make a good faith effort to provide reasonable accommodations for the known physical or mental limitations of an otherwise qualified applicant or employee with a disability, unless undue hardship would result to your School. An applicant or employee who believes he or she requires an accommodation in order to perform the essential functions of the job should contact Human Resources and request such an accommodation, specifying what accommodation he or she needs to perform the job. Your School will analyze the situation, engage in an interactive process with the individual, and respond to the individual's request. If you believe you have been subjected to discrimination, please follow the complaint procedure outlined below.

### HARASSMENT

It is the policy of your School to ensure equal employment opportunity without discrimination, harassment, intimidation, or bullying based on actual or perceived ancestry, age, color, disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sex, sexual orientation, actual or potential parental, family, marital status, or association with a person or a group with one or more of these actual or perceived characteristics. Your School prohibits any such discrimination or harassment. In addition, we prohibit abusive conduct/workplace bullying in the work environment. It is our mission to provide a professional work and learning environment free of harassment, discrimination and/or workplace bullying that maintains equality, dignity, and respect for all. This policy protects all employees of the School as well as interns, volunteers, and potential employees (applicants). All employees of the School are required to abide by this policy, regardless of position or status, including supervisors, administration, and co-workers. In addition, this policy prohibits unlawful harassment by third parties, including students, parents, vendors or other third parties, who have workplace contact with our employees. This policy applies to all applicants and employees (or other listed individuals), whether related to conduct engaged in by fellow employees or someone not directly connected to your School (e.g. an outside vendor, consultant or customer). Conduct prohibited by these policies is unacceptable in the workplace and in any work-related setting outside the workplace, such as during business or field trips, meetings and business or school-related social events.

#### What is Harassment?

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

- Offensive remarks, comments, jokes or slurs pertaining to an individual's race, religion, sex, sexual orientation, gender or gender identity or gender expression, age, national origin or ancestry, disability, citizenship, veteran status, or any other protected status as defined by law or regulation whether verbally or by electronic means including email, and/or text messages
- Offensive sexual remarks, sexual advances, flirtations, or requests for sexual favors regardless of the gender of the individuals involved and whether verbally or by electronic means
- Offensive physical conduct, including, but not limited to, touching, blocking normal movement or interfering with another's work regardless of the gender of the individuals involved, including, but not limited to threats of harm, violence or assault
- Offensive pictures, drawings or photographs or other communications, including email, text messages, or other forms of electronic communication
- Holding work functions in inappropriate venues, such as a strip-club
- Sex or gender based practical jokes, sexual favoritism
- Threatening reprisals due to an employee's refusal to respond to requests for sexual favors or for reporting a violation of this policy
- Unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct of a sexual nature, regardless of gender, when:
  - Submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment;
  - Submission to, or rejection of, such conduct by an individual is used as a basis for employment decisions affecting such individual;
  - Such conduct has the purpose or effect of substantially interfering with the individual's work performance or creating an intimidating, hostile or offensive working environment.
  - What is abusive conduct/workplace bullying?
- Conduct of an employee in the workplace that a reasonable person would find hostile, threatening, intimidating, humiliating and unrelated to an employer's legitimate business interests.
  - Use of derogatory remarks, insults and/or epithets.
  - Verbal or physical conduct that sabotages or undermines a person's work performance that is threatening, humiliating or intimidating.
- Bullying, gossip, profanity, abusive conduct and negative comments are destructive to our School culture, create false rumors, disrupt school operations and interfere with the privacy of others.

#### What is Retaliation?

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

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

As used in this policy, an "adverse employment action" means conduct or an action that materially affects the terms and conditions of the employee's employment status or is reasonably likely to deter the employee from engaging in further protected activity. An adverse employment action may include, but is not limited to, the following: demotion, suspension, reduction in pay, denial of merit salary increase, failure to hire, refusing to promote, denying employment opportunities, changing work assignments or otherwise treating an employee differently.

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

#### Responsibility

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

#### Reporting

Your School encourages reporting of all perceived incidents of discrimination, harassment, abusive conduct or retaliation, regardless of the offender's identity or position. Individuals who believe that they have been subjected to such conduct should immediately discuss their concerns with their immediate supervisor, Executive Director or Human Resources. Do not report your complaint to any individual who has allegedly engaged in the inappropriate behavior that is the subject of your complaint. In addition, your School encourages individuals who believe they are being subjected to such conduct to promptly advise the offender that his or her behavior is unwelcome and request that it be discontinued. Often this action alone will resolve the problem. Your School recognizes, however, that an individual may prefer to pursue the matter through formal complaint procedures. Every effort will be made to keep such reports as confidential as possible, although confidentiality cannot be guaranteed. Your School is serious about enforcing its policy against harassment; however, your School cannot resolve a harassment problem that it does not know about. Therefore, employees are responsible for bringing any such problems to your School's attention so it can take whatever steps are necessary to correct the problems.

Supervisors must report any and all conduct of which they are made aware, which violates, or may violate, policies regarding discrimination, unlawful harassment, or retaliation to Human Resources, the Executive Director or the Chair of the Board of Directors, if appropriate. Supervisors who fail to report alleged violations may be subject to disciplinary action, up to and including termination.

Title IX provides for separate processes and procedures for sexual harassment and sexual assault when the type of conduct falls within the definitions of sexual harassment and sexual assault as provided in 34 C.F.R. § 106.30. In addition, the conduct must have taken place at school locations, events or circumstances over which the School exercised substantial control over both the individual who has been accused of sexual harassment and/or assault and the context in which the sexual harassment occurs. For these types of complaints, the School will follow the Title IX policy processes and procedures, which may be found in the School's Title IX grievance policy. If the conduct does not fall within Title IX, this policy will be followed. There may be instances where the conduct falls within both policies and the School will follow both policies.

The School's Title IX Coordinators are:

For Lake View Charter School and Winship Community Schools: Julie Haycock Email- julie.haycock@lakeviewcharter.org Phone Number- (916) 382-8873

For Clarksville and Feather River Charter Schools: Jenell Sherman Email- jenell.sherman@featherrivercharter.org Phone Number- (916) 532-5923

If you have a complaint about Title IX, contact the Title IX Coordinator listed above. You have 180 days of the date of the alleged discrimination, unless the time for filing is extended for good cause by the Title IX Coordinator. Although you are not required to utilize the School's internal grievance procedure, you may do so prior to filing a complaint with the Office of Civil Rights (OCR). If you use the School's internal grievance process, your Title IX complaint must be filed with the Office of Civil Rights within 60 days after the last act of the School's grievance process. If using the School's grievance process, the School will investigate student Title IX claims of discrimination using the processes adopted through the Uniform Complaint Procedure. A copy of the School's Uniform Complaint Procedures is available on the School's website.

Questions, concerns or complaints regarding compliance with Title IX employee issues, please contact the Human Resources Director Becky Harris, 4818 Golden Foothills Parkway #9, El Dorado Hills, CA 95762, (916) 241-8657. Questions, concerns or complaints regarding harassment, discrimination, intimidation and bullying, please contact the Equity Compliance Officer, Darcy Belleza, 4818 Golden Foothills Parkway #9, El Dorado Hills, CA 95762, (916) 241-8657.

#### Universal Complaint Procedure

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

Your School's investigation methods will vary depending on the nature of the complaint, the allegations, the witnesses, and other factors. The investigation may include individual interviews with the parties involved and, where necessary, with individuals who may have observed the alleged conduct or may have other relevant knowledge. All complaints will be handled as confidentially as possible and information will be disclosed only as it is necessary to complete the investigation and resolve the matter. All employees are required to fully cooperate with your School's investigation, which includes, but is not limited to, providing all pertinent information in a truthful manner, submitting pertinent documents in their possession, not interfering with the investigation in any manner, and maintaining an appropriate level of discretion regarding the investigation. Failure to do so may result in disciplinary action, up to and including termination.

During the investigation, your School will provide regular progress updates, as appropriate, to those directly involved. Your School will strive to complete its investigation as efficiently as possible in light of the allegations and will reach any conclusions based on the evidence collected and credibility of the witnesses. Your School may investigate conduct in the absence of a formal complaint if your School has reason to believe that an individual has engaged in conduct that violates School policies or applicable law. Further, your School may continue its investigation even if the original complainant withdraws his or her complaint during the course of the investigation. Any conduct which your School believes constitutes harassment, discrimination, abusive conduct, or retaliation in violation of this policy will be dealt with appropriately. Corrective action may include, for example, training, referral to counseling and/or disciplinary action such as warning, reprimand, withholding of a promotion or pay increase, reassignment, temporary suspension without pay or termination, as your School believes appropriate under the circumstances. Due to privacy protections, your School may not be able to fully disclose its entire decision regarding corrective action to the complainant. False and malicious complaints of harassment, discrimination, abusive conduct, or retaliation as opposed to complaints, which, even if erroneous, are made in good faith, may be the subject of appropriate disciplinary action. You may view the Universal Complaint Procedure on your school's website.

#### Conclusion

This policy was developed to ensure that all employees could work in an environment free from harassment, discrimination, abusive conduct and retaliation. Your School will make every reasonable effort to ensure that all concerned are familiar with these policies and aware that any complaint in violation of such policies will be investigated and resolved appropriately. Any employee who has questions or concerns about these policies should talk with Human Resources or the Executive Director. Finally, these policies should not, and may not, be used as a basis for excluding or separating individuals of a particular gender, or any other protected characteristic, from participating in business or work-related social activities or discussions. In other words, no one should make the mistake of engaging in discrimination or exclusion in order to avoid allegations of harassment. The law and the policies of your School prohibit disparate treatment on the basis of sex or any other protected characteristic, with regard to terms, conditions, privileges and prerequisites of employment. The prohibitions against harassment, discrimination, abusive conduct, and retaliation are intended to complement and further those policies, not to form the basis of an exception to them.

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

#### Training Requirements

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

#### AT WILL EMPLOYMENT

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

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

#### TRANSCRIPTS FOR SALARY ADJUSTMENT

All transcripts must be turned in to Human Resources before September 1 to be considered for the current school year. If you choose to enroll in courses for Professional Development, please complete the *Professional Development Survey* in the HST Handbook no later than September 1, for consideration for the upcoming school year. This is an approval of courses to confirm that courses to be enrolled in are educationally relevant and sound. Failure to complete the *Professional Development Survey* before the deadline may result in no credit received for courses taken.

#### OPEN COMMUNICATION POLICY

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

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

#### LACTATION ACCOMMODATION POLICY

Your School provides a reasonable amount of break time to accommodate a female employee's need to express breast milk for the employee's infant child. For those employees that are working at a school site, the School will also make a reasonable effort to provide the employee with the use of a room or other private location in close proximity to the employee's work area for the employee to express milk in private. The location will also meet the following requirements: not be a bathroom; be free from intrusion; be shielded from view; be safe, clean, and free of hazardous materials; contain a surface to place a breast pump and personal items; contain a place to sit; and have access to electricity or alternative devices, including, but not limited to, extension cords or charging stations, needed to operate an electric or battery-powered breast pump. In addition, the School shall provide access to a sink with running water and a refrigerator suitable for storing milk in close proximity to the employee's work area. If a refrigerator cannot be provided, the School may provide another cooling device suitable for storing milk, such as a School-provided cooler.

The School reserves the right to deny an employee's request for a lactation break if the additional break time will seriously disrupt operations.

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

- The employee should complete an accommodation request form and contact the employee's supervisor or Human Resources to request designation of a location and time to express breast milk under this policy. The School will respond accordingly, generally within two business days.
- The requested break time should, if possible, be taken concurrently with other scheduled break periods. Nonexempt employees should clock out for any lactation breaks that do not run concurrently with normally scheduled rest periods. Any such breaks will be unpaid.

Retaliation for making a lactation accommodation request is strictly forbidden. If the employee believes she has been retaliated against it should be reported immediately to her supervisor, Human Resources or Executive Director. Discrimination against and harassment of lactating employees in any form is unacceptable, a form of prohibited sex/gender discrimination, will not be tolerated at your School and will be handled in accordance with your School's policy on discrimination and harassment. If any employee believes that he or she has experienced retaliation or discrimination as a result of conduct protected by this policy, the employee may file a complaint with his or her supervisor and/or the Labor Commissioner's

Office. For more information, contact the Labor Commissioner's Office by phone at 213-897-6595 or visit a local office by finding the nearest one on our website: [www.dir.ca.gov/dlse/DistrictOffices.htm](http://www.dir.ca.gov/dlse/DistrictOffices.htm). The Labor Commissioner's Office provides an interpreter at no cost to the employee, if needed.

#### **PUBLIC RELATIONS**

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

Below are several things employees can do to help leave people with a good impression of our School. These are the building blocks for our continued success:

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

#### **WHISTLEBLOWER POLICY**

Your School is committed to maintaining a workplace where employees are free to raise good faith concerns regarding certain business practices, specifically: (1) reporting suspected violations of law, including but not limited to federal laws and regulations; (2) providing truthful information in connection with an inquiry or investigation by a court, agency, law enforcement, or other governmental body; and (3) identifying potential violations of School policy, specifically the policies contained in your School's Employee Handbook. An employee who wishes to report a suspected violation of law or School Policy may do so by contacting the Executive Director, Director or Human Resources.

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

Any employee who believes that he or she has been subjected to any form of retaliation as a result of reporting a suspected violation of law or policy should immediately report the retaliation to one of the following: the Executive Director, Director or Human Resources. Any supervisor, manager, or human resources staff member that receives complaints of retaliation must immediately inform the Executive Director or Chair of the Board of Directors, if appropriate.

Reports of suspected violations of law or policy and reports of retaliation will be investigated promptly and in a manner intended to protect confidentiality as much as possible (although confidentiality cannot be guaranteed) and consistent with a full and fair investigation. Human Resources and a member of School administration will conduct the investigation or designate other internal or external parties to conduct the investigations. The investigating parties will notify the concerned individuals of their findings as appropriate.



## SECTION 4 – THE EMPLOYMENT PROCESS

### EMPLOYEE STATUS AND CLASSIFICATIONS

Each School employee is either a “full-time,” “part-time,” or “temporary” employee and either an “exempt” or “non-exempt” employee. Some of the policies and benefits described in this handbook depend on whether the employee is full-time or part-time. Full-time employees are those employees regularly scheduled to work 30 or more hours or more each week. Part-time employees are those regularly scheduled to work less than 30 hours each week. Temporary employees are those employed for short-term assignments or in connection with a specific project or event. Temporary employees are not eligible for employee benefits, except those mandated by applicable law.

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

#### Exempt

This category includes all regular employees who are determined by the School to be exempt from certain wage and hour provisions of state and federal laws. Exempt employees are paid a fixed salary that is intended to cover all of the compensation to which they are entitled. Exempt employees will be expected to work the number of hours necessary to complete their assigned responsibilities. Because they are exempt, such employees are not entitled to additional compensation for extra hours of work. Typically, full-time Teachers and Administrators are exempt employees.

#### Non-Exempt

This category includes all regular employees who are covered by certain wage and hour provisions of state and federal laws. Non-exempt employees are entitled to overtime and double-time pay as well as meal and rest breaks, as prescribed by law. Typically, all part-time and temporary employees are non-exempt. Additionally, most Classified staff are typically non-exempt employees.

#### Certificated Employee

Certificated Employees are teachers and administrators.

- Homeschool teachers (HST) are Schedule A
- Specialized Teachers including High School Teachers and Virtual Academy Teachers, Education Specialists, Speech Pathologists, Nurses, and Occupational Therapists are Schedule B
- Leadership is Schedule C
- Administration is Schedule D
- See below for Schedule E
- Part-time HST’s are Schedule F

#### Classified Employee

Classified Employees include those employees hired by the School that do not primarily instruct students, nor require state certification, such maintenance, assistants and other operational employees.

- Classified Employees are Schedule E on the salary schedule

### WORK SCHEDULES

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

Your School reserves the right to assign employees to jobs other than their usual assignment when necessary, provided the employee is capable of performing the essential functions of the alternate assignment.

Non-exempt employees are not to work before or to continue working after their scheduled hours unless specifically assigned by the supervisor. Non-exempt employees are not allowed to work “off the clock.” Attendance at School-sponsored functions is not compensated unless the supervisor has required you to attend. Employees violating these rules may be subject to disciplinary action up to and including termination.

### WORKWEEK AND WORKDAY

Staff are expected to complete their School employment duties from 8:30 a.m. – 5:00 p.m. Monday- Friday excluding holidays.

### VIRTUAL TEACHING EMPLOYMENT CONDITIONS

#### Position Responsibilities:

- Teachers selected for special assignment including, but not limited to High School Virtual Academy, Junior High Virtual Academy, Intervention or other created programs deemed “Virtual” within the job description will be assigned a “Virtual Class” or “Virtual Classes”
- Teachers are provided, at the School’s expense, a computer capable of maintaining a high speed internet connection for conducting virtual classes and other duties. Other equipment provided when necessary for class upon request.
- Teachers must be available each school day from 8:30 a.m. – 5:00 p.m. Monday - Friday by internet and/or phone.
- Teachers assigned to virtual classes will be required to conduct a virtual classroom session.
- Teachers must have access to a phone for calling/responding to students/parents during the teacher’s scheduled time within twenty-four (24) hours..
- Teachers will use the tracking and monitoring system integrated into the student’s assigned course. Teachers will provide continual monitoring of the student’s progress and their scheduled benchmarked progress status.
- Teachers will be responsible for all virtual school required record keeping and reporting.

#### Training:

- Teachers are required to attend training sessions hosted virtually or in-person. Mileage reimbursement will follow standard School protocols and procedures.

#### Worksites:

- Most classes will be held virtually. Teachers may work from home.

### SPECIAL EDUCATION TEACHING EMPLOYMENT CONDITIONS

#### Special Education Teachers/ Case Managers

- Special Education Teachers/ Case Managers teach specialized academic instruction (SAI) and transition services as well as credit bearing courses virtually.
- Teachers are provided, at the School’s expense, a computer capable of maintaining a high speed internet connection for conducting virtual class and other duties.
- Teachers must be available each school day from 8:30 a.m. – 5:00 p.m. Monday - Friday by internet and/or phone.
- Special Education Teachers are required to teach in virtual classrooms/ sessions.
- Teachers must have access to a phone for calling/responding to students/parents during the teacher’s scheduled time within twenty-four (24) hours.
- Teachers will use the tracking and monitoring system in google classroom and curricular programs as well as SEIS. Teachers will provide continual monitoring of the student’s progress at the scheduled progress reporting times.
- Teachers are responsible for collecting data and student work samples for student IEP goals and special education taught courses.
- Teachers will be responsible for all special education required record keeping and reporting.

#### Training:

- Teachers are required to attend training sessions hosted virtually or in-person. Special Education Teachers are required to attend two in-person schoolwide meetings/trainings per year. Mileage reimbursement will follow standard School protocols and procedures.

#### State-wide Assessments:

- Special Education Teachers are required to proctor 5 days (maximum) of in-person state-wide assessments per year

#### Worksites:

- Special Education Teachers work remotely as all classes and sessions are taught virtually.

### ATTENDANCE AND PUNCTUALITY

Employees are expected to observe regular attendance and be punctual. Each of our employees is critical to our success. Therefore, regular attendance and punctuality is considered an essential function of all positions. If you are unable to report for work on any particular day, you must call your supervisor at least one hour before the time you are scheduled to begin working for that day. If you call in less than one hour before your scheduled time to begin work, you will be considered tardy for that day. Absent extenuating circumstances or a medical provider’s order excusing you from work for a period of time, you must call in on any day you are scheduled to work and will not report to work. The School understands that in some cases, advance notice is not possible. In these cases, notify your supervisor personally at the earliest possible moment. In some circumstances, you may be required to provide verification of the reason or documentation for your absence.

More than three instances of tardiness by a non-exempt employee or instructional employee during any twelve-month period are considered excessive. Any unexcused absence is considered excessive. If you fail to report for work without any notification to your supervisor and the absence continues for a period of three business days, the School will determine that you have abandoned your job and voluntarily terminated your employment.

**PROFESSIONAL DEVELOPMENT**

Employees are expected to attend and participate in all professional development sessions and other school sponsored trainings that may be scheduled. While we understand that scheduling conflicts may arise, consistent tardiness, absenteeism or early departures may result in disciplinary action. When an employee attends a school sponsored professional development and/or training, the time spent in attendance shall be counted as time worked. For virtual attendance, video registration/chat or signing in on a Google Doc/Survey will serve as attendance. For in-person meetings, either online document or paper documentation will be required for the purpose of record keeping. These records will serve as the official roster of attendance. Your School will pay hourly employees for attendance at mandatory trainings, lectures and meetings outside of regular working hours at the employee’s hourly rate. As exempt employees, salaried staff may be required to attend training seminars that may be outside of your School’s normal business hours with no additional pay. In the event that an employee must leave early or is unable to attend a scheduled training (i.e. Professional Development sessions), during their normal work hours, an employee MUST put in a time-off request according to the time-off policy. Employees may also be required to attend make-up sessions of any missed training. Failure to comply with this policy may result in disciplinary action.

**TIME RECORDS (NON-EXEMPT EMPLOYEES)**

Non-exempt employees must accurately complete time records within the School’s time keeping system on a daily basis. Each time record must show the exact time work began and ended, the meal periods taken, and employee signature. Absences and overtime must be accurately identified on your time record. Non-exempt employees are not allowed to work “off the clock.” All time actually worked must be recorded. You cannot record time and/or submit a time record for another employee. Each employee must sign and submit his or her own time record. Employees must record all time actually worked.

Exempt employees must report full days of absence from work. Deductions from an exempt employee’s salary will be made only in accordance with applicable law. Employees should immediately contact Human Resources with any questions concerning their pay so that inadvertent errors can be corrected.

**OVERTIME**

All non-exempt employees are required to obtain approval from their supervisor prior to working overtime or double-time. Failure to obtain such approval may subject an employee to discipline, up to and including termination. However, in all cases, the School will compensate its non-exempt employees for all hours worked.

**OFF THE CLOCK WORK**

Your School prohibits all non-exempt employees from working off the clock at any time. All time worked must be recorded on the employee’s timesheet. This includes the use of laptops, computers, PDAs or cell-phones to check work email, voicemail or to send text messages after hours.

**MEAL AND REST PERIODS (NON-EXEMPT EMPLOYEES)**

All non-exempt employees are provided with an opportunity to take meal and rest periods consistent with the law. During your meal periods and rest periods, you may not work at all. You are excused from all duties. In addition, please understand that you may not combine required meal or rest periods in order to take a longer break. Also, you may not miss a required meal or rest period in order to start work later or leave work earlier. In the rare event that you believe you cannot take a meal or rest period, or you are unable to take a full meal or rest period pursuant to School policy or you must begin your meal period more than five hours after your work period began, you must notify Human Resources in advance whenever possible (and, in any event, as soon as possible) so that the proper measures may be taken. Failure to comply with the School’s policy regarding meal and/or rest periods can lead to discipline, up to and including termination.

**Meal Periods**

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

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

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

**Rest Periods**

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

<b>Hours Worked</b>	<b>Number of Rest Periods</b>		
3.5 hours to 6 hours	1, 10-minute rest period	Over 6 hours to 10 hours	2, 10-minute rest periods
		Over 10 hours to 14 hours	3, 10-minute rest periods

Non-exempt employees must observe assigned working hours, the time allowed for rest periods, and report any missed rest period immediately as set forth below. Employees are encouraged to report any concerns regarding meal or rest periods to Human Resources.

**Reporting Missed, Late or Short/Interrupted Meal and Rest Periods**

Any employee who misses a meal or rest period or who experiences a late, short, or interrupted meal period – for any reason – must immediately report this issue in writing (via email) to Human Resources on the same workday that he or she experienced the non-compliant meal or rest period. The employee must include a description providing a thorough explanation for the non-compliant meal or rest period.

If an employee voluntarily chooses to miss a meal or rest period or take a late, short, or interrupted meal period (e.g., I chose to take my lunch later in the day or I chose to refuse an “authorized” meal period at the time provided by your school), the employee is not entitled to premium pay (one additional hour of pay). If an employee involuntarily experiences a missed meal or rest period or a late, short, or interrupted meal period (e.g., my supervisor asked me to handle a client call or meeting that caused me to miss or take a late meal period), the employee is entitled to premium pay. Employees must report the reason for the non-compliant meal or rest period to Human Resources.

**PAYDAYS**

Employees are paid semi-monthly in accordance with the School’s payroll schedule. The Payroll Coordinator or his or her designee will distribute checks to those who do not have direct deposit. If a normally scheduled pay day falls on a weekend or holiday, paychecks will be distributed the preceding business day.

A written, signed authorization is required for mail delivery or for delivery of your paycheck to any other person. If you have an automatic deposit for your paycheck, your funds will be deposited to the financial institution you requested by the end of business on the scheduled payday. While an automatic deposit may actually credit to your account before your actual “payday,” the School is not responsible for automatic payments or withdrawals dated prior to your actual payday and you should not depend on early deposits of your pay. If a wage garnishment order is received by your School for one of our employees, we are obligated by law to comply with the demand. The affected employee will receive notice from his or her supervisor or Human Resources as soon as possible.

**PAYROLL WITHHOLDINGS**

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

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

Every deduction from the employee’s paycheck is explained on the check voucher/paystub. If the employee does not understand the deduction, then he or she should ask Human Resources to explain it. The employee may change the number of withholding allowances he or she wishes to claim for Federal and/or State Income Tax purposes before any pay period by filling out a new W4 form and submitting it to Human Resources.

## SECTION 5- CONDITIONS OF EMPLOYMENT

### IMMIGRATION LAW COMPLIANCE

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

### CREDENTIAL REQUIREMENTS

If you are a credentialed team member, you must provide copies of your credential, official transcripts, and/or test scores prior to your first day of actual work. Failure to provide these documents may delay your ability to begin work. You are also responsible for keeping required certificates, credentials, and registrations current and in good standing, for paying the costs associated with renewal, and for providing both your Executive Director and the School with verification of renewals. Failure to provide these updated documents to the School may result in suspension without pay until such time as the necessary documentation has been provided. If a teacher fails to obtain the appropriate credential, or allows a credential, certificate, registration, or required course deadline to expire, or fails recertification, training, or testing, the School reserves the right to suspend the teacher without pay until the teacher's credential is cleared, or release the teacher from at-will employment as necessary.

### TEACHER INDUCTION

Your school does not offer Teacher Induction. Please refer to the California Commission on Teacher Credentialing.

### RESIDENCY REQUIREMENTS

All employees with in-person requirements as part of their job description are required to live and reside in California, in the region where students are served. Employees are not permitted to work for the School while out of the state of California, unless on a pre-approved basis.

### TEMPORARY RESIDENCY

Temporary Residency for Certificated Employee: All certificated employees (with in-person requirements as part of their job description) who are seeking to relocate with a temporary residence are required to: Write a "Temporary Residency Request" to their supervisor and Executive Director a minimum of 5 days prior to departing primary residence.

Certificated employees must obtain written approval from their supervisor and Executive Director for the Temporary Residency to be granted. Failure to do so, will result in a dock in pay for days absent. Temporary Residency may be approved for a maximum of two weeks and the certificated employee is expected to continue and perform all job duties per their job description, communicate and execute all job duties with students, colleagues, and all work-related entities. Certificated employees are expected to continue to be available between the scheduled hours of 8:30am-5pm. Though a temporary residency may not be the norm, employees are encouraged to review the other leave policies outlined in the Employee Handbook that may be deemed more appropriate for the circumstance. Temporary Residency is not to be construed as a vacation, as only Administration (Schedule D) has PTO in their contract. All Certificated staff, please refer to the Leave policies or Human Resources for more clarification.

### TUBERCULOSIS TEST

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

TB Clearance is good for four years and it is the employee's responsibility to remain in compliance and ensure the School has a valid certificate on file.

### CRIMINAL BACKGROUND CHECK

As required by law, all individuals working or volunteering at the School will be required to submit to fingerprinting and a criminal background investigation.

The School shall, on a case-by-case basis, determine whether a volunteer will have more than limited contact with pupils or consider other factors requiring a criminal background check for such a volunteer.

### CHILD ABUSE AND NEGLECT REPORTING ACT

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

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

While each employee has the responsibility to ensure the reporting of any child he/she suspects is a victim of abuse, the employee is not to verify the suspicion or prove that abuse has occurred. Teachers or staff who become aware of suspected child abuse should report the suspicions as required. All employees will be mandated child abuse reporters and will participate in annual training, follow all applicable reporting laws and the same policies. Your School's Child Abuse and Neglect Policy will contain detailed policies and procedure for the immediate reporting of suspected child abuse and neglect. All appropriate staff are required to certify knowledge of the policy annually, and employees shall receive mandated reporter training annually. Your school will provide this training, as well as other trainings, mandated by law during the week before school begins.

It is extremely important that School employees comply with the requirements of the Child Abuse and Neglect Reporting Act (CANRA). No mandated reporter can be held civilly or criminally liable for any report required or authorized by CANRA. In addition, any other person who voluntarily reports a known or suspected incident of child abuse or neglect will not incur civil or criminal liability unless it is proven that the report was false and the person knew the report was false or made the report with reckless disregard of its truth or falsity. Your direct supervisor is available to answer any questions employees may have about their responsibilities under CANRA, or to assist an employee in making a report under CANRA. If an employee makes a report pursuant to CANRA without the School's assistance, he or she is required to notify the School of the report if it is based on incidents he or she observed or became aware of during the course and scope of his or her employment with the School.

### PERSONNEL FILES

An employee or former employee (or designee) has the right to inspect or receive a copy of his or her personnel records at reasonable times, at a reasonable place, and on reasonable advance notice to Human Resources. All requests should be put in writing preferably on the form maintained by the School. If the request includes a request for copies the employee or former employee may be required to pay for the actual costs of copying. The Employer will respond to such a request within 30 days of receipt of the written request. Employees are not entitled to inspect or copy: letters of reference, records that relate to an investigation of possible criminal activity, ratings, reports, or records obtained prior to employment, prepared by examination committee members or obtained in connection with a promotional examination.

### CHANGES IN EMPLOYEE INFORMATION

An employee is responsible for notifying Human Resources about changes in the employee's personal information and changes affecting the employee's status (ex. name changes, address or telephone number changes, marriages or divorces, etc.) This notification by the employee must occur as close to the change as possible, but no later than 30 days following the change.

## SECTION 6 – PERFORMANCE

### PERFORMANCE EVALUATIONS

Performance evaluations generally are conducted annually to provide both employees and supervisors with the opportunity to discuss the employee's position, tasks, identify and correct weaknesses, encourage and recognize strengths, and discuss methods for improving performance. The performance evaluations are intended to make employees aware of their progress, areas for improvement, and objectives or goals for future work performance. Favorable performance evaluations do not guarantee an increase in salary or promotional opportunities, or even continued employment. Salary increases and promotions are solely within the discretion of your school and depend upon many factors in addition to performance.

#### Certificated Staff:

At the start of each academic year, each certificated staff member will meet with their Supervisor or Instructional Team Advisor to establish Performance Objectives or SMART Goals for that school year. The certificated staff member will put these objectives in writing and complete a pre-evaluation template to be provided by their Supervisor or Instructional Team Advisor. The Supervisor or Instructional Team Advisor will evaluate the certificated staff member's performance at least once a year formally and on an ongoing basis informally. The evaluation will be based on factors including the certificated staff member's job description, accomplishment of the Performance Objectives, and standards for teaching performance. In addition to these more formal performance evaluations, your School encourages you and your supervisor to discuss your job performance on an ongoing basis.

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

#### Classified Staff:

Formal evaluations are generally held once each year. You will be provided a copy of the evaluation tool and as part of the process you will do a self-evaluation. Your supervisor may schedule your evaluation time in advance so that you are prepared for the process. In addition to these more formal performance evaluations, the School encourages you and your supervisor to discuss your job performance on an ongoing basis.

## SECTION 7 – LEAVES

### FAMILY MEDICAL LEAVE ACT/CALIFORNIA FAMILY RIGHTS ACT

The School complies with the federal Family and Medical Leave Act (FMLA) and the California Family Rights Act (CFRA), both of which require the School to permit each eligible employee to take up to 12 work weeks of leave in any 12-month period for the birth or adoption of a child, the employee's own serious health condition or for the serious health condition of the employee's child, parent, or spouse. CFRA further allows for 12 work weeks of leave to care for the serious health condition of the employee's grandchild, grandparent, domestic partner, or sibling.

Child means a biological, adopted, or foster child, a stepchild, a legal ward, a child of domestic partner, or a person to whom the employee stands in loco parentis. Parent means a biological, foster, or adoptive parent, a stepparent, a legal guardian, or other person who stood in loco parentis to the employee when the employee was a child. For ease of reference in this policy, all leave taken under FMLA and CFRA will be referred to as "FMLA Leave," except to the extent that leave under FMLA and CFRA do not overlap. It is also the policy of the School that it will not interfere with, restrain, or deny any employee's rights provided by FMLA and CFRA. FMLA leave runs concurrently with Pregnancy Disability Leave, while CFRA leave does not.

Eligible employees may request a family and medical leave of absence under the circumstances described below. Eligible employees are those who have been employed by the School for at least 12 months (not necessarily consecutive), have worked at least 1250 hours during the 12 months immediately prior to the family and medical leave of absence, and, for purposes of FMLA leave only, are employed at a worksite where there are 50 or more employees of the School within 75 miles.

Ordinarily, you must request a planned family and medical leave at least 30 days before the leave begins. If the need for the leave is not foreseeable, you must request the leave as soon as possible. You should use the School's request form, which is available upon request from Human Resources. Failure to comply with this requirement may result in a delay of the start of the leave.

A family and medical leave may be taken for the following reasons:

1. The birth of an employee's child or the placement of a child with the employee for foster care or adoption, so long as the leave is completed within 12 months of the birth or placement of the child;
2. The care of the employee's spouse, child, parent, or registered domestic partner with a "serious health condition";
3. The care of a grandchild, grandparent, domestic partner, or sibling with a serious health condition. Leave taken pursuant to this section is available only through CFRA and not FMLA. As such, FMLA does not run concurrently with leave taken for the employee's grandchild, grandparent, domestic partner, or sibling with a serious health condition.
4. The "serious health condition" of the employee;
5. The care of the employee's spouse, child, parent, or next of kin who is a member of the Armed Forces, including a member of the National Guard or Reserves, and who is undergoing medical treatment, recuperation, or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list, for a serious injury or illness incurred in the line of duty on active duty or that existed before the beginning of the member's active duty and was aggravated by service in the line of duty; or
6. Any qualifying exigency as defined by the applicable regulations arising out of the fact that the employee's spouse, registered domestic partner, child, or parent is on active duty (or has been notified of an impending call or order to active duty) in the Armed Forces in support of a contingency operation. Domestic partner leave under this section is only available through CFRA and not FMLA.

A "serious health condition" is an illness, injury, impairment, or physical or mental condition that involves inpatient care in a hospital or other medical care or residential health care facility or continuing treatment or supervision by a health care provider. You may take a leave under paragraphs (2) or (3) above only if due to a serious health condition, your spouse, child, grandchild, grandparent, sibling, parent, or registered domestic partner requires your care or assistance as certified in writing by the family member's health care provider. If you are seeking a leave under paragraph (4) above, you must provide the School with a medical certification from your health care provider establishing eligibility for the leave, and you must provide the School with a release to return to work from the health care provider before returning to work. You must provide the required medical certification to the School in a timely manner to avoid a delay or denial of leave. You may obtain the appropriate forms from Human Resources.

Family and medical leave is unpaid and may be taken for up to 12 workweeks during the designated 12-month period (with the exception of qualifying leaves to care for a member of the Armed Services who has a serious illness or injury, which may be taken for up to a total of 26 workweeks of leave during a single 12-month period). The 12-month period will be defined as a "rolling twelve months" looking backward over the preceding 12 months to calculate how much family and medical leave time has been taken and therefore determine the amount of leave that is available. Qualifying leaves to care for a member of the Armed Services who has a serious illness or injury will be calculated on the 12-month period looking forward. All time off that qualifies as family and medical leave will be counted against your state and federal family and medical leave entitlements to the fullest extent permitted by law. You will be required to use any available sick time during unpaid family and medical leave. You will also be required to use any available paid sick leave during unpaid family and medical leave that is due to your own or a family member's serious health condition. However, if an employee is receiving benefit payments pursuant to a disability insurance plan (such as California's State Disability Insurance plan or Paid Family Leave program) or workers' compensation insurance plan, the employee and the School may mutually agree to supplement such benefit payments with available paid sick leave.

Benefit accrual, such as PSL, PTO, and holiday benefits, will be suspended during the approved leave period and will resume upon return to active employment. During a family and medical leave, group health benefits will be maintained as if you were continuously employed. However, you must continue to pay your share of applicable premiums (for yourself and any dependents) during the leave.

If the employee out on leave chooses not to return from a leave allowed by this policy after the expiry of the leave, the employee will be required to repay the School the premium amounts it paid during leave, unless the employee does not return to work because of circumstances beyond the employee's control or because of recurrence, continuation, or onset of a serious health condition.

If you do not return to work on the first workday following the expiration of an approved family and medical leave, you will be deemed to have resigned from your employment. Upon returning from such a leave, you will normally be reinstated to your original or an equivalent position and will receive pay and benefits equivalent to those you received prior to the leave, as required by law. In certain circumstances, "key" employees may not be eligible for reinstatement following a family and medical leave. The School will provide written notice to any "key" employee who is not eligible for reinstatement.

Before an employee will be permitted to return from leave taken because of their own serious health condition, the employee must obtain a certification from their health condition, the employee must obtain a certification from their health care provider that they are able to resume work.

If you have any questions concerning, or would like to submit a request for a family and medical leave of absence, please contact Human Resources.

### PREGNANCY DISABILITY LEAVE

The School provides pregnancy disability leaves of absence without pay to eligible employees who are temporarily unable to work due to a disability related to pregnancy, childbirth, or related medical conditions. Employees should make requests for pregnancy disability leave to their supervisor at least 30 days in advance of foreseeable events and as soon as possible for unforeseeable events. A health care provider's statement must be submitted, verifying the need for such leave and its beginning and expected ending dates. Any changes in this information should be promptly reported to Human Resources. Employees returning from pregnancy disability leave must submit a health care provider's verification of their fitness to return to work.

The School will make a good faith effort to provide reasonable accommodations and/or transfer requests when such a request is medically advisable based on the certification of a healthcare provider. When an employee's health care provider finds it is medically advisable for an employee to take intermittent leave or leave on a reduced work schedule and such leave is foreseeable based on planned medical treatment because of pregnancy, the School may require the employee to transfer temporarily to an available alternative position. This alternative position will have an equivalent rate of pay and benefits and must better accommodate recurring periods of leave than the employee's regular job.

Eligible employees are normally granted unpaid leave for the period of disability, up to a maximum of four months (or 17 1/3 weeks or 693 hours) per pregnancy. Employees will be required to use any unused allotted sick time during any unpaid portion of pregnancy disability leave. Employees may also elect to use any available PTO during any unpaid portion of pregnancy disability leave. If an employee is receiving benefit payments pursuant to a disability insurance plan (such as California's State Disability Insurance plan or Paid Family Leave program), the employee and the School may mutually agree to supplement such benefit payments with available sick leave.

Benefit accrual, such as PTO, sick leave, and holiday benefits, will be suspended during the approved pregnancy disability leave period and will resume upon return to active employment. Group health benefits will be maintained during the approved pregnancy disability leave as if you were continuously employed. However, you must continue to pay your share of applicable premiums (for yourself and any dependents) during the leave.

Additionally, if an employee does not return to work after the expiration of the pregnancy disability leave, and the reasons for failure to return to work do not include one of the following: 1) the employee is on CFRA leave; or 2) the continuation, recurrence or onset of a health condition entitling the employee to pregnancy disability leave in the first instance, or a non pregnancy-related medical condition requiring other leave or other circumstances beyond the control of the employee, the School reserves the right to recover from the employee the premium the School paid for the employee's group health plan while out on leave.

So that an employee's return to work can be properly scheduled, an employee on pregnancy disability leave is requested to provide the School with at least one week's advance notice of the date she intends to return to work.

When an approved pregnancy disability leave ends, the employee will be reinstated to the same position, unless the job ceases to exist because of legitimate business reasons. An employee has no greater right to reinstatement to the same position or to other benefits and conditions of employment than if she had been continuously employed in this position during the pregnancy disability leave or transfer. If the same position is not available, the employee will be offered a comparable position in terms of such issues as pay, location, job content, and promotional opportunities, if one exists. An employee has no greater right to reinstatement to a comparable position or to other benefits or conditions of employment than an employee who has been continuously employed in another position that is being eliminated.

If you have any questions regarding pregnancy disability leave, please contact Human Resources.

#### **ADDITIONAL LEAVES**

Some of the following leaves are designated with asterisks, which means that application and employee eligibility requirements of the leave (either in part or in whole) depends on whether the School employs the minimum number of employees indicated below. Policies without an asterisk apply regardless of the number of School employees.

- \*The School has 15 or more employees
- \*\*The School has 16 or more employees
- \*\*\*The School has 25 or more employees

Should you have any questions as to eligibility requirements of any leave policy, please contact Human Resources.

#### **MILITARY SPOUSE LEAVE\*\*\***

An eligible employee-spouse of a qualified service member is entitled to take ten (10) days unpaid leave during a period when the spouse is on leave from deployment during a period of military conflict. An eligible employee must work an average of 20 hours per week; must provide notice of his or her intention to take the leave within two (2) business days of receiving official notice that the service member will be on leave; and submit written documentation certifying that the service member will be on leave during the time the leave is required.

The employee may use available PSL or PTO for this leave.

#### **WORKERS' COMPENSATION LEAVE**

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

#### **BEREAVEMENT LEAVE**

The School provides regular full-time employees up to three (3) days of paid bereavement leave, beyond sick or personal time, due to the death of an immediate family member. This includes a parent (including an in-law and step-parent), spouse, domestic partner, dependent, sibling, stepsibling, grandparent or grandchild. If a funeral is more than 500 miles from your home, you may receive paid leave for five (5) days with prior approval from your supervisor.

#### **JURY DUTY LEAVE**

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

Non-exempt employees who are called for jury/witness duty will be provided time off without pay. Exempt employees will receive their regular salary unless they do not work any hours during the course of a workweek. Employees may elect to use any available PTO during jury/witness duty leave.

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

#### **TIME OFF TO VOTE**

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

An employee may also serve as an election official on Election Day without being disciplined, however the School will not pay the employee for this time off. Available PTO may be used for this time off. Nothing in this policy requires the employee to bring his or her mail (absentee) ballot to work, including mailing such absentee ballots from work.

#### **SCHOOL ACTIVITIES LEAVE\*\*\***

The School encourages employees to participate in the school activities of their child(ren). If you are the parent or guardian of a child who is in school up to grade 12, or who attends a licensed daycare facility, you may take up to 40 hours of unpaid leave per year to participate in the activities of the school or daycare facility, to find, enroll or reenroll your child in a school or with a licensed childcare provider and/or to address a childcare provider or school emergency.

The leave is subject to all of the following conditions:

- The time off for school activity participation cannot exceed eight (8) hours in any calendar month, or a total of forty (40) hours each year;
- Unless it is an emergency, employees planning to take time off for school visitations must provide as much advance notice as possible to their supervisor;
- If the School employs both parents, the first employee to request such leave will receive the time off. The other parent will receive the time off only if the leave is approved by his or her supervisor;
- Employees must use existing PTO in order to receive compensation for this time off;
- Employees who do not have paid time off available will take the time off without pay.
- Documentation of participation may be requested and will be sufficient if it is provided in writing by the school or the licensed child care/day care facility.

#### **SCHOOL APPEARANCE/SUSPENSION LEAVE**

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

This leave is unpaid but the employee may choose to use available PTO. You will not be discharged or discriminated against because of an absence protected by this law.

#### **CRIME VICTIM LEAVE**

Employees are allowed to be absent from work for various reasons related to crime or abuse if:

- The employee is a victim of a crime;
- An immediate family member is a victim of a crime (immediate family member means: spouse, registered domestic partner, child, step-child, adoptive child, foster child, legal ward of the court, adopted child, a child of a domestic partner, a child to whom the employee stands in loco parentis, a person to whom the employee stood in loco parentis when the person was a minor, sibling, step-sibling, foster sibling, adoptive sibling, half-sibling, parent, step-parent, or the child or a registered domestic partner, or any other individual whose close association with the employer is the equivalent of any of these family relationships).
- "Victim of crime" means a victim of stalking, domestic violence, or sexual assault, victim of crime that caused physical injury or that caused mental injury and a direct threat of physical injury or a person whose immediate family member is deceased as the direct result of crime.
- Leave may be taken for any of the following reasons:
  - An employee may take leave to appear in court to comply with a subpoena or other court order as a witness in any judicial proceeding;
  - An employee victim may take time off to obtain or attempt to obtain any relief, which includes, but is not limited to, a temporary restraining order, restraining order, or other injunctive relief, to help ensure the health, safety, or welfare of the victim or their child
  - An employee victim to seek medical attention for injuries caused by crime or abuse
  - An employee victim to seek medical attention for injuries caused by crime or abuse
  - An employee victim to obtain services from a domestic violence shelter, program, rape crisis center, or victim services organization or agency as a result of crime or abuse
  - An employee victim to obtain psychological counseling or mental health services related to an experience of crime or abuse
  - An employee victim to participate in safety planning and to take other actions to increase safety from future crime or abuse, including temporary or permanent relocation.
  - An employee is entitled to attend judicial proceedings relating to crimes listed below relating to that crime or those crimes against an immediate family member victim, a registered domestic partner of a victim or the child of a registered domestic partner of a victim: 1) A violent felony as defined in Penal Code section 667.5(c); 2) A serious felony as defined in Penal Code section 1192.7(c); or 3) A felony provision of law proscribing theft or embezzlement.

An employee must give reasonable advance notice to the School by providing documentation of the proceeding, unless advanced notice is not feasible. Documentation may be from any of the following:

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

When an unscheduled absence occurs, the School shall not take action against the employee if the employee, within a reasonable time after the absence, provides a certification to the employer.

Documentation may be from any of the following:

- A police report indicating that the employee was a victim

- A court order protecting or separating the employee from the perpetrator of the crime or abuse, or other evidence from the court or prosecuting attorney that the employee has appeared in court
- Documentation from a licensed medical professional, domestic violence counselor, a sexual assault counselor, victim advocate, licensed health care provider, or counselor that the employee was undergoing treatment or receiving services for physical or mental injuries or abuse resulting in victimization from the crime or abuse
- Any other form of documentation that reasonably verifies that the crime or abuse occurred, including but not limited to, a written statement signed by the employee, or an individual acting on the employee's behalf, certifying that the absence is for a purpose authorized by this Crime Victim Leave.

This leave is unpaid but the employee may choose to use available PSL or personal time off (PTO). You will not be discharged or discriminated against because of an absence protected by this law. The School will also, to the extent possible and allowed by law, maintain the confidentiality of an employee requesting leave under this provision.

#### **DOMESTIC VIOLENCE LEAVE/SEXUAL ASSAULT LEAVE\*\*\***

If you are the victim of domestic violence, sexual assault, or stalking, you may be entitled to a reasonable accommodation for your safety while at work. Reasonable accommodations may include the implementation of safety measures, including a transfer, reassignment, modified schedule, changed work telephone, changed work station, installed lock, assistance in documenting domestic violence, sexual assault, stalking, or other crime that occurs in the workplace, an implemented safety procedure, or another adjustment to a job structure, workplace facility, or work requirement in response to domestic violence, sexual assault, stalking, or other crime, or referral to a victim assistance organization. The School is not required to undertake an action that constitutes an undue hardship on its business operations. If you require a reasonable accommodation in line with this policy, please contact the School's human resources manager.

You will not be discharged, discriminated against, or retaliated against because of a request for an accommodation under this policy.

Employers are prohibited from discharging, discriminating, or retaliating against an employee who is a victim of domestic violence, the victim of sexual assault or stalking for taking time off to seek medical attention, obtain services from a domestic violence shelter or program or rape crisis center, obtain psychological counseling, participate in safety planning, or temporary or permanent relocation.

#### **MILITARY LEAVE**

California's military leave laws, found at Military & Veterans Code section 389 et seq. and the Uniformed Services Employment and Reemployment Rights Act ("USERRA") found at 38 U.S.C. Section 4301 et seq., ensure that employees are not adversely affected in their employment after taking leave for military service. Employees who serve in the military and are entitled to a military leave of absence without pay from the School under applicable laws should notify Human Resources regarding the need for military leave.

Please see Human Resources for more information regarding job reinstatement rights upon completion of military service.

#### **ADULT LITERACY LEAVE\*\*\***

Pursuant to California law, the School will reasonably accommodate any eligible employee who seeks to enroll in an adult literacy education program, provided that the accommodation does not impose an undue hardship on the School. The School does not provide paid time off for participation in an adult literacy education. However, you may utilize available PTO if you want compensation for this time off. If you do not have any PTO available, you will be permitted to take the time off without pay.

#### **ORGAN DONOR / BONE MARROW DONOR LEAVE\***

Pursuant to California law, the School will provide up to five business days of paid leave within a one-year period to an employee who donates bone marrow to another person. In addition, the School will provide up to 30 business days of paid leave within a one-year period and up to another 30 business days of unpaid leave within a one-year period to an employee who donates an organ to another person. The one-year period is measured from the date the employee's leave begins and shall consist of 12 consecutive months. The School requires that bone marrow donors use up to five days of available accrued PSL or vacation time during the course of the leave. Organ donors must use up to ten days of available accrued PSL or vacation time during the course of the leave.

The employee will also be given an additional unpaid leave of absence, not exceeding 30 business days in a one-year period, when that employee is an organ donor, for the purpose of donating the employee's organ to another person. The one-year period is measured from the date the employee's leave begins and shall consist of 12 consecutive months. To qualify for this leave, an employee must have been employed for at least 90 days prior to the commencement of the leave and must provide the School with written verification of his or her status as an organ or bone marrow donor and the medical necessity for the donation. During such leave, the School will continue coverage under its group medical insurance plan, if applicable. However, employees must continue to pay their portion of the applicable premiums. Employees should give the School as much notice as possible of the intended dates upon which the leave would begin and end.

This leave does not run concurrently with FMLA/CFRA. You may take this leave incrementally, as medically necessary, or all at one time. All health benefits shall be maintained during this leave to the extent they exist at the time of the leave. This leave shall not be considered a break in service and the employee shall continue to receive paid time off and other benefits as if they had continued working. An employee shall not have any greater rights during this leave than if he or she had been actively working during this time, but will be reinstated to their same or equivalent job prior to the leave. No employee shall be discriminated or retaliated against for taking an organ donation or bone marrow leave.

#### **DRUG & ALCOHOL REHABILITATION LEAVE\*\*\***

Your School will reasonably accommodate any employee who volunteers to enter an alcohol or drug rehabilitation program, if the reasonable accommodation does not impose an undue hardship on the School. Reasonable accommodation includes time off without pay and adjusting work hours. You may use allotted and unused sick leave. All reasonable measures to safeguard your privacy will be maintained.

This policy in no way restricts your School's right to discipline an employee, up to and including termination of employment, for violation of your School's Substance and Alcohol Policy.

#### **VOLUNTEER CIVIL SERVICE LEAVE**

You are allowed to be absent from work to engage in volunteer emergency duty as a volunteer firefighter, reserve police officer, or emergency rescue personnel. This is an unpaid leave, but the employee may use any earned sick, and/or PTO.

#### **CIVIL AIR PATROL LEAVE\*\***

Your School provides eligible employees who are volunteer members of the California Wing of the Civil Air Patrol and are called to emergency operational missions up to (10) days of unpaid leave per calendar year. Leave for a single emergency operational mission will generally be limited to three days unless an extension is granted by appropriate government entities and approved by the School.

To be eligible, employees must have been employed with the School for 90 days immediately preceding the commencement of leave. Additionally, the School may require certification from the proper Civil Air Patrol authority to verify the eligibility of the employee for the leave requested or taken. Employees may use available paid time off for leave taken under this policy. The notice and eligibility requirements for any such paid time off will generally apply to an employee's request for use of PTO under this policy.

## SECTION 8 – BENEFITS

### SCHOOL HOLIDAYS

The School observes 12 paid holidays during the year:

- New Year's Day
- Martin Luther King Day
- Lincoln's Birthday
- Washington's Birthday
- Memorial Day
- Independence Day
- Labor Day
- Veteran's Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Eve Day
- Christmas Day

To be eligible for holiday pay, an employee must be full-time and non-exempt and must work both the business day before and after the holiday. Part-time employees, temporary employees, exempt employees and teachers are not eligible for holiday pay. Exempt employees and teachers will receive their regularly scheduled pay during holidays. Eligible employees will receive time off with pay at their regular rate of pay on the School-observed holidays listed above. When a holiday falls on a Saturday or Sunday, it is usually observed on the preceding Friday or following Monday. However, the School may close on another day. Holiday observance will be announced in advance. The School reserves the right to change this policy at any time, with or without notice.

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

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

To qualify for holiday pay, all employees must work the last scheduled day before and the first scheduled day after the holiday unless the employee is absent:

- At the Supervisor's request/approval
- Due to closure of schools because of inclement weather
- Due to sickness with a doctor's note verifying need for absence
- Prior to or following Jury Duty or Bereavement Leave
- Due to a previously scheduled and approved time off

### PAID TIME OFF (PTO) - SCHEDULE D-ADMINISTRATION

Full-time Administrative (Schedule D) school employees are entitled to paid time off (PTO) according to this policy. PTO days may be used for vacation, personal time, illness, or time off to care for family or dependents. All other employees, including teachers, temporary employees, part-time employees are not eligible to receive or accumulate PTO. PTO must be scheduled at least five (5) days in advance and approved by your supervisor, except in the case of an illness or emergency. In the case of illness or emergency you are required to contact your immediate supervisor at least one (1) hour before your shift begins, if possible or otherwise as soon as practicable. Employees using extended PTO time (in excess of three (3) days) must submit a request at least two (2) weeks before the extended PTO or, if used as sick time, the employee may be required to submit a doctor's release upon return to work. Your supervisor uses his/her discretion to approve PTO without advance notice.

Unless used for illness related purposes, PTO may not be taken the last week of the school year, or on scheduled in-service and/or training days, testing administration day, or immediately before or after holidays without supervisor's permission.

All full-time Administrative school employees may be eligible to receive up to ten (10) days (i.e., 80 hours) of PTO each school year (July 1- June 30). Once an employee's PTO balance reaches twenty (20) days (i.e., 160 hours), the employee stops receiving any additional PTO until PTO is used and the employee's balance falls below the 20-day cap. PTO days will not accumulate during any unpaid leave of absence.

The following terms also apply to PTO:

- For both non-exempt and exempt employees, vacation time may be taken in minimum increments of .25 hours. If an exempt employee absents himself or herself from work for part or all of a workday, he or she will be required to use available PTO to make up for the absence.
- In the event an employee has exhausted his or her PTO, any additional time off must be approved by their supervisor and will be taken without pay.
- Any employee who misses three (3) consecutive days of work without notice to their supervisor may be deemed to have abandoned his/her job and voluntarily resigned from employment.
- Upon separation of employment, employees will be paid their earned PTO based on their date of separation and their regular rate of pay.
- To the extent permitted by law, PTO accumulated prior to the start of a requested and approved unpaid leave of absence must be used to cover hours missed before the start of the unpaid leave.

As with all of its policies and procedures, the School reserves the right to modify, alter, or otherwise eradicate this policy at its sole and absolute discretion to the extent allowed by law.

### SICK LEAVE

The School enacted this policy in accordance with the California Healthy Workplaces, Healthy Families Act to provide paid sick leave ("PSL") to eligible employees.

#### Eligible Employees

All employees (including teachers, part-time and temporary employees) who work for the School more than 30 days within a year in California are allotted PSL as set forth in this policy.

#### Permitted Use

Eligible employees may use their allotted PSL to take paid time off for the diagnosis, care, or treatment of an existing health condition of (or preventive care for) the employee or the employee's family member. For purposes of this policy, "family member" means a child, parent, spouse, registered domestic partner, grandparent, grandchild, or sibling of the employee. "Child" means a biological child, a foster child, an adopted child, a step-child, a child of a registered domestic partner, a legal ward, or a child of a person standing in loco parentis. "Parent" means a biological, foster, or adoptive parent, a step-parent, or a legal guardian of the employee or the employee's spouse or registered domestic partner. "Spouse" means a legal spouse, as defined by California law. Employees may also use their PSL to take time off from work for reasons related to domestic violence, stalking, or sexual assault.

#### Allotment

PSL days are allotted as set forth below to eligible employees:

- Full-time employees:
  - On July 1 of each year, eligible employees will be allotted ten days (80 hours) of PSL per school year (July 1 – June 30), which unused PSL days will carryover year to year subject to a cap of 18 days (144 hours). Employees hired after July 1 but before December 31 will receive ten days (80 hours) of PSL on his or her first day of employment. Employees hired after December 31 will receive five days (40 hours) of PSL on his or her first day of employment.
- All other eligible employees:
  - All other eligible employees will be allotted three days (24 hours) of PSL each school year (July 1 – June 30) on July 1 or on his or her first day of employment, even if hired mid-year. PSL days are "use it or lose it" and, as such, do not carry over from year to year.

#### Limits on Use

Eligible employees may use PSL beginning on the 90th day of employment. PSL may be taken in minimum increments of .25 hours. If an exempt employee absents himself or herself from work for part or all of a workday for a reason covered by this policy, he or she will be required to use PSL to make up for the absence.

#### Notification

The employee must provide reasonable advance notification, orally or in writing, of the need to use PSL, if foreseeable. If the need to use PSL is not foreseeable, the employee must provide notice as soon as practicable. If you are out using sick time for more than 3 consecutive days a doctor's note is required to return to work. If a doctor's note is not supplied it will be unapproved unpaid time off unless previously arranged with your Director.

#### Termination

Employees will not receive pay in lieu of unused PSL. Unused PSL will not be paid out upon termination.

#### No Discrimination or Retaliation

The School prohibits discrimination or retaliation against employees for using their PSL.



**PAID SICK LEAVE DONATION POLICY****Personal Hardship**

Employees who have exhausted all paid sick leave (PSL) may request donations from co-workers through this policy. The PSL donation policy applies to employees suffering from a catastrophic illness or other medical emergency, which for the purposes of this policy, constitutes an employee's or a family member's medical condition that will require the prolonged/extended absence of the employee from duty and will result in a substantial loss of income to the employee due to the exhaustion of all PSL available.

**Eligibility**

Employees who are experiencing hardship due to a catastrophic illness or medical emergency are eligible to request and receive donations of PSL from other employees who have agreed to surrender leave to the School sponsored leave bank.

**Requests for Donations**

A written request for PSL donations that describes the specific medical emergency or medical condition must be submitted to Human Resources. Human Resources will verify the employee's eligibility, and make a written determination which will be given to the employee as soon as practical.

**Donations of Paid Leave**

Employees who have more than 24 hours of PSL and who wish to donate PSL to the School sponsored leave bank on behalf of an eligible employee shall complete a PSL Donation Form indicating the number of PSL hours to be donated and the employee, if any, who the employee requests receive the benefit of the donation. All such donations are voluntary and irrevocable.

1. Donating employees must maintain a minimum of 24 hours of PSL after reducing their leave balance to effect the donation.
2. In any 12-month period, no employee may donate more than 40 hours.
3. Voluntary donations of PSL are final upon submission of a signed PSL Donation Form that satisfies the conditions established by this policy. The donating employee's PSL balance account shall thereupon be reduced by the hours donated.
4. Donated hours not used by the eligible employee during the hardship period shall remain in the eligible employee's PSL account balance.
5. The names of donating employees, hours donated, and the value of such donations shall be kept confidential to the extent possible.

**Valuation of Donated PSL**

The value of the donated paid leave shall be determined by multiplying the number of hours donated by the donating employee's current hourly rate to determine the value of the donation in dollars ("Donation Value"). The Donation Value shall then be divided by the eligible employee's current hourly rate to determine the number of hours to be added to the eligible employee's PSL balance. Human Resources shall periodically notify the eligible employee of donations made pursuant to this policy. The eligible employee may then request to receive payment for these hours, which will be treated as taxable "wages" to such eligible employees for the payroll period utilized. No employee shall receive payment for more than 40 hours of paid leave, whether allotted or donated, during any week unless required by state or federal law.

**INSURANCE BENEFITS**

Full-time employees are entitled to insurance benefits offered by the School. These insurance benefits will include medical, dental, and vision. The School will set a defined contribution towards the employee's insurance premiums that are sponsored by the School. This amount will be determined on an annual basis. The employee's portion of the monthly premiums will be deducted from the employee's paycheck on a pre-tax basis.

If medical insurance premium rates increase, employees may be required to contribute to the cost of the increase to retain coverage. Unless otherwise mandated by law, employees on a leave of absence may be responsible for selecting continuing health coverage and paying the premium for such coverage through COBRA. If you have any benefit related questions while on a leave of absence, please contact Human Resources.

Full-time employees will also be covered under an insurance policy that includes Life Insurance at no cost to the full-time employee. Additional voluntary insurance plans will be offered through the School that will be the employee's responsibility to purchase and pay for.

**COBRA BENEFITS**

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

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

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

**SOCIAL SECURITY/MEDICARE**

If you are a full time regular employee contributing to a teacher's retirement system STRS, your earnings from this job are not covered under Social Security. When you retire, or if you become disabled, you may receive a pension based on earnings from this job. If you do, and you are also entitled to a benefit from Social Security based on either your own work or the work of your spouse, or former spouse, your pension may affect the amount of the Social Security benefit you receive. Your Medicare benefits, however, will not be affected.

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

**STATE DISABILITY INSURANCE (WAGE SUPPLEMENT)**

All employees are enrolled in California State Disability Insurance (SDI), which is a partial wage replacement insurance plan for California workers. Employees may be eligible for SDI when they are ill or have non-work related injuries, or may be eligible for work related injuries if they are receiving workers' compensation at a weekly rate less than the SDI rate. Specific rules and regulations relating to SDI eligibility are available from Human Resources.

**PAID FAMILY LEAVE (WAGE SUPPLEMENT)**

Under California law, eligible employees may participate in the Paid Family Leave ("PFL") program, which is part of the state's unemployment compensation disability insurance program. The PFL program provides up to eight weeks of partial wage replacement benefits to employees who take time off to care for a seriously ill or injured child, spouse, parent, registered domestic partner, siblings, grandparents, grandchildren, or parents-in-law or to bond with a new child (birth, foster care, adoption) The PFL program does not provide job protection or reinstatement rights. It is a wage supplement provided concurrently while an employee takes an eligible leave of absence under the School policy and applicable law.

The program will be administered in a manner consistent with California law. For more information regarding this program, you may contact the California Employment Development Department.

**WORKER'S COMPENSATION INSURANCE**

Eligible employees are entitled to workers' compensation insurance benefits when suffering from an occupational illness or injury. This benefit is provided at no cost to the employee. In the event of an occupational injury or illness (as defined under Workers' Compensation Law) an employee may be covered by workers' compensation insurance instead of group insurance. If an employee should become injured or in any way disabled on the job, he or she must report the injury immediately to his or her supervisor. It is a felony to file a fraudulent or false workers' compensation claim.

## SECTION 9 – EMPLOYEE COMMUNICATIONS POLICY

### COMMUNICATIONS POLICY

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

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

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

#### No Expectation of Privacy

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

Even if employees use a password to access the Communication Systems (or any aspect thereof), the confidentiality of any message stored in, created, received, or sent from the School's Communication Systems is not assured. Use of passwords or other security measures does not in any way diminish the School's right to monitor and access materials on its Communication Systems, or create any privacy rights of employees in the messages and files on the system. Any password used by employees must be revealed to the School upon request for any reason that the School, in its discretion, deems appropriate. Further, employees should be aware that deletion of any Email messages, voicemails or files would not truly eliminate the messages from the system. All Email messages, voicemails and other files may be stored on a central back-up system in the normal course of data management. Employees have no expectation of privacy in anything they view, create, store, send, or receive on the Communication Systems.

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

#### Professional Use of Communication Systems Required

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

#### Offensive and Inappropriate Material

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

The School may (but is not required) to use software to identify inappropriate or sexually explicit Internet sites. Such sites may be blocked from access by the School networks. Employees who encounter inappropriate or sexually explicit material while browsing on the Internet should immediately disconnect from the site, regardless of whether the site was subject to the School's blocking software.

#### Solicitations

The School's Communication Systems may not be used to solicit for political causes, commercial enterprises, outside organizations, or other non-job-related solicitations. Approval from the Executive Director is required before anyone carpost any information on commercial on-line systems or the Internet.

#### Licenses and Fees

Employees may not agree to a license or download any material over the Internet for which a registration fee is charged without first obtaining the express written permission of his/her Executive Director.

#### Games and Entertainment Software

Employees may not use a School Internet connection to download games or other entertainment software, or to play games over the Internet.

#### Confidential Information

Employees may not transmit information over the Internet or through email that is confidential or proprietary. Employees are referred to the School's "Confidential Information" policy, contained herein, for a general description of what the School deems confidential or proprietary. When in doubt, employees must consult their immediate supervisor and obtain approval before transmitting any information that may be considered confidential or proprietary.

#### Copyrights and Trademarks

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

Any School approved material that is posted or sent via its computer system should contain all proper copyright and trademark notices. Absent prior approval from a supervisor to act as an official representative of the School, employees posting information must include a disclaimer in that information stating, "Views expressed by the author do not necessarily represent those of the School."

#### Maintenance and Security of the System

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

To ensure security and to avoid the spread of viruses, employees accessing the Internet through a computer attached to the School's network must do so through an approved Internet firewall. Accessing the Internet directly by modem is strictly prohibited unless the computer you are using is not connected to the School's network. Files obtained from sources outside the School including disks brought from home; including files downloaded from the Internet, news groups, bulletin boards, or other online services; files attached to email; and files provided by customers or vendors, may contain dangerous computer viruses that may damage the School's computer network. Employees should never download files from the Internet, accept email attachments from outsiders, or use disks from non-School sources, without first scanning the material with the School approved virus checking software. If you suspect that a virus has been introduced into the School network, notify technology personnel immediately.

#### Violations of this Policy

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

#### Amendment and Modification of this Policy

The School reserves the right to modify this policy at any time, with or without notice. The School may require employees to acknowledge and comply with a separate Acceptable Use Policy for Internet and Network Resources, which shall contrain the event of a conflict.

### SOCIAL MEDIA POLICY

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

Employees shall not accept students as friends on any personal social networking sites and are to decline any student-initiated friend requests. Teachers are not to initiate “friendships” with students or parents. Employees must delete any students already on their “friends” list immediately.

With regard to social networking content, employees should not use commentary deemed to be defamatory, obscene, proprietary, or libelous with regard to any School-related business or policy, employee, student, or parent. Additionally, employees should exercise caution with regards to exaggeration, obscenity, copyrighted materials, legal conclusions, and derogatory remarks or characterizations. Employees should weigh whether a particular posting puts his/her effectiveness as a School employee at risk. The School encourages employees to post only what they want the world to see. Imagine that students, their parents, or administrators will visit your site as most information is available to the general public even after it is removed from the site. Employees may not discuss students nor post images that include students.

Due to security risks, employees must be cautious when installing the external applications that work with the social networking site. At a minimum, it is recommended that all employees should have all privacy settings set to “Only Friends”. The settings “Friends of Friends” and “Networks and Friends” open your content to a large group of unknown people, including students.

#### Personal or Professional Blogs

If you are developing a website or writing a blog that will mention the School, you must identify that you are an employee of the organization and that the views expressed on the blog or web site are yours alone and do not represent the views of the School. Unless given permission by your Executive Director, you are not authorized to speak on behalf of the School or to represent that you do so. If you are developing a site or writing a blog that will mention the School, as a courtesy to the organization, please let your Executive Director know in advance of publication. Your Executive Director may choose to visit your blog or social networking site from time to time.

You may not share information that is confidential and proprietary with regard to the School. This includes, but is not limited to, information about curriculum, School dynamics, School programs, future goals, or current challenges within the organization. These are given as examples only and do not cover the range of what the School considers confidential and proprietary. If you have any questions about whether information has been released publicly or doubts of any kind, speak with your Executive Director and Human Resources.

When writing a blog or participating in any other social networking site, employees should speak respectfully about the School and our current and potential employees, students, parents, and competitors. Name-calling or behavior that will reflect negatively on the organization’s reputation is discouraged. Note that the use of copyrighted materials, unfounded, harassing, libelous, or derogatory statements, or misrepresentation is not viewed favorably by the School and can result in disciplinary action, up to, and including termination.

All employees who engage in social networking may be legally liable for anything he/she writes or presents online. Employees can be disciplined, if appropriate, by the School for commentary, content, or images that are defamatory, pornographic, proprietary, harassing, libelous, or that can create a hostile work environment.

This policy should not be construed, and will not be applied, in a manner that violates employee rights under the National Labor Relations Act. Employees may not comment on a student’s blog or a student’s other social networking commentaries. Employees may not use trade names, or logos belonging to the School without express written permission of the Executive Director. Failure to comply with the School’s social media policy will result in disciplinary action, up to, and including, immediate termination.

#### EQUIPMENT POLICY

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

#### Laptop Computers

Each staff member assigned a laptop for professional use shall be required to sign a laptop Agreement Form and will be charged for any damages, loss or theft to the laptop caused by willful misconduct or gross negligence.

Although issued to an individual employee, all computing devices are considered the personal property of the primary organizational unit to which the receiving employee belongs and shall be returned upon termination of employment with the School, after reassignment of job duties or immediately upon request at any time by an official of the School. Employees are expected to take all appropriate measures and precautions to prevent the loss, theft, damage and/or unauthorized use of such equipment. Such precautions shall include, but not be limited to the following:

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

If the employee fails to adhere to these procedures, the employee may be held legally and financially responsible to the School for the replacement of such equipment. The School is under no legal, financial or other obligation to provide for a replacement computing device to any employee whose device is lost, stolen or damaged.

There is no expectation of privacy in School equipment. The School may add security and other tracking technology to any and all computing devices issued by it and any and all such usage is subject to management review, monitoring, and auditing by the School. Other audits may be performed on the usage and internal controls as deemed necessary. Non-compliance with any policies or procedures regarding Employee Computers and Portable Computing Devices issued by the School will result in appropriate disciplinary action and/or reimbursement of any and all costs to the School.

#### CELL PHONE POLICY

Personal cell phones should not be used while you are working if assigned to a location. Cell phones should be turned off and stored with your other personal belongings while you are working. If you are required to perform business on a cell phone for the School while driving, you must utilize the hands-free option on the cell phone or a headset/earpiece device. Sending, writing, or reading text based communications on your cell phone while driving a School vehicle or your own vehicle to conduct School business is prohibited. Text based communications include, but are not limited to, text messages, instant messages, and email. If you are assigned a School cell phone to conduct School business, please notify your supervisor if the cell phone is misplaced, stolen, or damaged. Personal calls, received or placed, are not allowed on School cell phones.

#### Telephone Calls and Texting

While at work and during staff meetings, the employee’s undivided attention is expected. Cell phones, texting, and pagers are not allowed so that the activities or discussion are not disturbed. Employees should wait to make personal phone calls during breaks.

#### NO SOLICITATION/DISTRIBUTION POLICY

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

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

Employees may not solicit other employees during the workday when either the person doing the solicitation or the person being solicited is engaged in or required to be performing work tasks. Employees may not distribute written materials of any kind during the workday when either the distributing employee or the employee receiving the materials is engaged in or required to be performing work tasks.

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

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

The sole exceptions to this policy are charitable and community activities supported and approved by the School. School bulletin boards are the only areas where any merchandise or notices may be placed. Such items must meet the guidelines established by the School. The School must approve any postings prior to posting.

The School reserves the right to discontinue any solicitation or distribution if the activities become disruptive to employees or the efficient operation of the School’s business.

Employees are required to leave School premises and other work areas at the completion of their workday. Employees are not permitted to enter or remain on School premises or work areas unless the employee is on duty, scheduled for work, coming to or departing from scheduled work, or otherwise has specific authorization from their supervisor.

#### Definitions

School “premises”: property owned, leased, operated, managed, or controlled by the School, including buildings, parking lots, and play areas that the School has the right to use exclusively or in common with others, vehicles owned or operated by the School.

Work time: any time when employees are engaged in or required to be performing work tasks. Work time does not include break periods, meal times, or other periods during the workday when employees are properly not engaged in performing their work tasks.

Work areas: all areas controlled by the School where employees are performing work, except cafeterias, employee break areas, and parking lots (non-work areas).

#### Employee Responsibility

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

#### ANTI-NEPOTISM POLICY

##### Policy Statement

It is the policy of the School to avoid Nepotism, which means to avoid creating or maintaining circumstances in which the appearance or possibility of favoritism, conflicts of interest, or management disruptions exist due to a relationship between the School decision-maker and his or her Family Member. This policy is to ensure effective supervision, internal discipline, security, safety, and positive morale in the workplace and to avoid the potential for problems of actual or perceived favoritism, conflicts in loyalty, discrimination, and appearances of impropriety or conflict of interest. This policy applies to all the School board members, employees, individual consultants hired or retained by the School, and School Services Providers hired or retained by the School.

Relationships between School Board Members, Employees, Consultants, or School Services Providers are permissible under the following circumstances:

Family Members of the School board members, employees, individual consultants, or School Services Providers shall not be hired for or retained in an employment position if one Family Member would have the authority or be in a position to directly supervise, hire, or discharge the other.

- (a) Any time a Board Member, employee, individual consultant, or School Services Provider is a Family Member of another, the relationship shall not result in an adverse impact on work productivity or performance. The determination of whether there is an adverse impact shall be in the discretion of the supervisor(s) of the employee(s), consultant(s), or School Services Provider(s), or in the case of a board member, at the discretion of the School Board of Directors.
- (b) Any time a Board Member, employee, individual consultant, or School Services Provider is a Family Member of another, the relationship shall not create an actual conflict of interest under the law, and shall not create a detrimental perceived conflict of interest. The determination of whether there is a detrimental perceived conflict of interest shall be at the discretion of the supervisor(s) of the employee(s), consultant(s) or School Services Provider(s), or in the case of a Board Member, at the discretion of the School Board of Directors.

##### Definitions

"Family Members" include an employee's parent, child (natural, adopted, or legal guardianship), spouse, domestic partner, brother, sister, grandparent, grandchild, step-relationships within the preceding categories, brother-in-law, sister-in-law, son-in-law, daughter-in-law and father-in-law.

"Nepotism" describes a work-related situation in which there is the potential for favoritism toward a Family Member (such as giving a job, promotion, biased performance reviews, or more favorable working conditions) on the basis of the familial relationship.

"School Services Provider" shall mean any provider of school services to the School, and in the case of an organization shall mean be the responsible individual at such organization that provides school services to the School.

##### Procedures

When a Family Member of a current the School Board Member, employee, individual consultant, or School Services Provider applies to become a board member or employee, or requests to be a consultant or School Services Provider, the Family Member's application/request must be denied if a conflict under this policy exists (e.g., if one Family Member would have the authority or be in a position to directly supervise, hire, or discharge the other). Special circumstances may be reviewed by the Board in the event that the School's best interests would be served otherwise.

When a Family Member of a current School Board Member, employee, individual consultant, or School Services Provider applies for a transfer to a new employment position within the School, the Family Member's application must be evaluated to determine whether a conflict under this policy exists. If a conflict exists, the application for transfer must either be denied or one of the Family Members must seek a position transfer to avoid the conflict, if any such opportunity exists. In the event that no such opportunity exists, the application for transfer must be denied.

In implementing this policy, it is permissible to ask an applicant, potential consultant, or School Services Provider to state whether he or she has a Family Member who is presently employed by or on the board of the School, but such information may not be used as a basis for an employment decision except as stated herein. When a relationship that creates a conflict with this policy occurs during employment, the School will attempt to arrange a transfer or change in position/duties to eliminate the conflict. If a suitable transfer/change in position/duties is not available, one of the employees may be separated from service. Every attempt will be made to effect transfer or separation on the basis of agreement between the employees involved and the School. If a mutual agreement is unattainable, the Board will determine, in the School's best interest, which employee is to be transferred or separated.

##### Responsibilities

The Executive Director or designee shall coordinate with the current employee's direct supervisor to develop appropriate plans to ensure that a Family Member's employment does not conflict with this policy. If the situation cannot be resolved by a transfer, then the Executive Director or designee will deny the application for employment. Special circumstances may be reviewed by the Board in the event that the School's best interests would be served by the employment of a Family Member.

The Executive Director or designee shall investigate reports of Nepotism and take appropriate action. Employees are required to disclose changes in their personal situations to the Executive Director or designee which may be covered by this policy. Supervisors may inquire about the family relationship between employees to determine the appropriateness of the working relationship under this policy. The Board shall make the final determination concerning potential conflicts with this policy involving the Executive Director.

#### VIOLENCE IN THE WORKPLACE

The School has adopted a policy prohibiting workplace violence. Consistent with this policy, acts or threats of physical violence, including intimidation, harassment, bullying, and/or coercion, which involve or affect the School or which occur on the School property will not be tolerated. Examples of workplace violence include, but are not limited to, the following:

- All threats or acts of violence occurring on the School premises, regardless of the relationship between the School and the parties involved
- All threats or acts of violence occurring off the School premises involving someone who is acting in the capacity of a representative of the School

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

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

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

If an employee becomes aware of an imminent act of violence, a threat of imminent violence, or actual violence, emergency assistance must be sought immediately. In such situations, the employee should contact the law enforcement authorities by dialing 911. Immediately after contacting the law enforcement authorities, employee must report the incident. There will be no retaliation against any employee who brings a complaint in good faith under the Violence in the Workplace Policy or who honestly assists in investigating such a complaint, even if the investigation produces insufficient evidence that there has been a violation, or if the charges cannot be proven. However, disciplinary action may be taken against employees who, in bad faith, make false or frivolous accusations.

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

## SECTION 10 – STANDARDS OF CONDUCT

### PERSONAL STANDARDS

Each employee must be neatly groomed and wear clothing that is professional and appropriate for the employee's position. Your Executive Director or immediate supervisor will inform you of any special clothing requirements. Employees will not be permitted to wear clothing or otherwise present an appearance that may cause disruption, be taken as offensive, or reduce productivity.

Consult your supervisor if you have any questions regarding appropriate attire.

### TEACHER-STUDENT INTERACTIONS

#### Boundaries Defined

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

#### Acceptable and Unacceptable Behavior

Some activities may seem innocent from a staff member's perspective, but some of these activities can be perceived as flirtation or sexual insinuation from a student or parental point of view. The purpose of the following lists of unacceptable and acceptable behaviors is not to restrain innocent, positive relationships between staff and students, but to prevent relationships that could lead to, or may be perceived as, inappropriate or sexual misconduct.

Staff members must understand their own responsibilities for ensuring they do not cross the boundaries as written in this policy. Disagreeing with the wording or intent of the established boundaries will be considered irrelevant for any required disciplinary purposes. Thus, it is critical that all employees study this policy thoroughly and apply its spirit and intent in their daily activities.

#### Unacceptable Behaviors

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

- Giving gifts to an individual student that are of a personal and intimate nature
- Kissing of ANY kind
- Any type of unnecessary physical contact with a student in a private situation
- Intentionally being alone with a student away from school
- Making, or participating in, sexually inappropriate comments
- Sexual jokes, or jokes/comments with sexual overtones or double-entendres
- Seeking emotional involvement (which can include intimate attachment) with a student beyond the normative care and concern required of an educator
- Listening to or telling stories that are sexually oriented
- Discussing inappropriate personal troubles or intimate issues with a student in an attempt to gain their support and understanding
- Becoming involved with a student so that a reasonable person may suspect inappropriate behavior
- Giving students a ride to/from school or school activities without parental permission
- Being alone in a room with a student at school with the door closed
- Allowing students in your home without signed parental permission for a pre-planned and pre-communicated educational activity which must include another educator, parent, or other responsible adult
- Remarks about the physical attributes or physiological development of anyone
- Excessive attention toward a particular student
- Sending emails, text messages, Facebook responses, or letters to students if the content is not about school activities

#### Acceptable and Recommended Behaviors

- Obtaining parent's written consent for any school activity (exclusive of tutorials)
- Obtaining formal approval (site and parental) to take students off school property for activities such as field trips or competitions
- Emails, text-messages, phone conversations, and other communications to and with students, if permitted, must be professional and pertain to school activities or classes (communication should be initiated via school-based technology and equipment)
- Keeping the door open when alone with a student
- Keeping reasonable and appropriate space between you and the student
- Stopping and correcting students if they cross your own personal boundaries
- Keeping parents informed when a significant issue develops about a student
- Keeping after-class discussions with a student professional and brief
- Immediately asking for advice from senior-staff or administration if you find yourself in a difficult situation related to boundaries
- Involving your supervisor in discussion about boundaries that have the potential to become more severe (including but not limited to: grooming or other red flag behaviors observed in colleagues, written material that is disturbing, or a student's fixation on an adult)
- Making detailed notes about an incident that in your best judgment could evolve into a more serious situation later
- Recognizing the responsibility to stop unacceptable behavior of students and/or co-workers
- Asking another staff member to be present, or within close supervisory distance, when you must be alone with a student after regular school hours
- Prioritizing professional behavior during all moments of student contact
- Asking yourself if any of your actions, which are contrary to these provisions, are worth sacrificing your job and career

#### Reporting

When any staff member becomes aware of another staff member, volunteer, guest or vendor having crossed the boundaries specified in this policy, or has a reasonable suspicion of misconduct, he or she must report the suspicion to their immediate supervisor, Human resources or the Executive Director promptly. Reasonable suspicion means it is based on facts which would lead a reasonable person to believe the conduct occurred. Prompt reporting is essential to protect students, the suspected staff member, any witnesses, and the School as a whole. Employees must also report to the administration any awareness of, or concern about, student behavior that crosses boundaries, or any situation in which a student appears to be at risk for sexual abuse.

#### Investigating

The School will promptly investigate and document the investigation of any allegation of sexual misconduct or inappropriate behavior, using such support staff or outside assistance, as it deems necessary and appropriate under the circumstances. Throughout this fact-finding process, the investigating administrator, and all other privy to the investigation, shall protect the privacy interests of any affected student(s) and/or staff member(s) including any potential witnesses, as much as possible.

#### Consequences

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

### CUSTOMER & PUBLIC RELATIONS

The School's image in front of students, parents (i.e. our "customers") and the general public is critical to our success. All employees are expected to be prompt, polite, courteous and attentive to our customers and the public. It is possible an employee may come into contact with a dissatisfied or hostile individual based on the nature of the employee's work. If this happens, you should immediately notify your supervisor, Human Resources, or the Executive Director. We will absolutely not tolerate conduct toward our customers or the general public that might be interpreted as unlawful discrimination or harassment. Human resources will open an investigation into the instance and document any findings. After the investigation has concluded the report and the findings will be filed with Human Resources. If you witness conduct in violation of this policy, you should immediately bring it to the attention of your supervisor or the Executive Director. A Report will be created and documentation will be filed with Human Resources.

### PROHIBITED CONDUCT

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

- Falsification of employment records, employment information, or other School records
- Recording the work time of another employee or allowing any other employee to record your work time, or allowing falsification of any time card, either your own or another's
- Theft, deliberate or careless damage, or loss of any School property or the property of any employee or customer
- Provoking a fight or fighting during working hours or on School property
- Participating in horseplay or practical jokes on School time or on School premises where such conduct might be a safety risk or might be interpreted as offensive
- Carrying firearms or any other dangerous weapons on School premises at any time or while acting on behalf of the School
- Violation of the Substance and Alcohol policy
- Insubordination, including but not limited to, failure or refusal to obey the orders or instructions of a supervisor or member of administration, or the use of abusive or threatening or abusive language toward a supervisor or member of administration
- Unreported absence on scheduled workdays unless otherwise excused
- Excessive tardiness or absenteeism unless otherwise excused
- Unauthorized use of School equipment, time, materials, facilities, or the School name
- Sleeping or malingering on the job
- Failure to observe working schedules, including the required rest and meal periods
- Soliciting other employees for membership, funds, or other similar activity in connection with any outside organization during your working time or the working time of the

employee(s) solicited

- Distributing unauthorized literature or any written or printed material during working time or in work areas ("Working time" does not include your meal and break periods.)
- Failure to timely notify your supervisor when you are unable to report to work
- Failure of an employee to obtain permission to leave work for any reason during normal working hours
- Abuse of sick leave
- Violation of the Communications Policy
- Failure to provide a physician's certificate when requested or required to do so
- Violating the School's Personal Standards or dresscode
- Breaching confidentiality
- Making derogatory racial, ethnic, religious, or sexual remarks or gestures; any violation of the Harassment and/or Equal Employment Opportunity policy; or using profane or abusive language at any time on School premises or during working hours
- Violation of any safety, health, security, or School rule
- Negligence or other conduct leading to the endangerment of harm of a child or children
- Working overtime without authorization or refusing to work assigned overtime
- Unsatisfactory job performance
- Willfully or maliciously making false statements regarding any co-worker or submitting a complaint known to be false.

#### **CONFIDENTIAL INFORMATION**

It is important to the School to protect and preserve its trade secrets and confidential information. Confidential information includes, but is not limited to, student information, all student lists, techniques and concepts, marketing plans, design specifications, design plans, strategies, forecasts, bid plans, bid strategies, bid information, contract prices, new products, software, computer programs, writings, and all know-how and show-how whether or not protected by patent, copyright, or trade secret law.

The School prohibits audio or video recordings in the workplace, during working hours, without authorization of the School due to privacy and confidentiality concerns and protections. The School devotes significant time, energy, and expense to develop and acquire its trade secrets and confidential information. As an employee of the School you will, during the course of your employment, have access to and become familiar with various trade secrets and confidential information that are owned by the School. An employee shall not, directly or indirectly, disclose or use any of the foregoing information other than for the sole benefit of the School, either during the term of your employment or at any other time thereafter. This information shall not be disclosed except through normal channels and with authorization. Any and all trade secrets or confidential information shall be returned to the School during extended leaves of absence or upon termination.

During your employment with the School, you will not be permitted nor required to breach any obligation to keep in confidence proprietary information, knowledge, or data acquired during your former employment. You must not disclose to the School any confidential or proprietary information or material belonging to former employers or others.

Violations of this policy may result in disciplinary action, up to and including termination.

#### **CONFLICTS OF INTEREST**

All employees must avoid situations that result in actual or even potential conflicts of interest. Personal, social, and economic relationships with competitors, suppliers, customers, parents, or co-employees that may impair an employee's ability to exercise good judgment on behalf of the School or which give the appearance of such impairment create an actual or potential conflict of interest. For example, romantic or personal relationships between a supervisor and subordinate employee can lead to supervisory problems, claims of harassment, and morale problems.

Any employee involved in such situations or relationships must immediately and fully disclose the nature of the situation or relationship to the Executive Director so a determination can be made as to whether an actual or potential conflict exists, and if so, how to correct the situation.

The School expects employees to devote their best efforts to the interests of our school. The School recognizes your right to engage in activities outside of your employment, which are of a private nature and unrelated to our business. However, outside activities (second jobs, side businesses, clubs, etc.) must not interfere with your ability to fully perform your job duties at the School or create a conflict of interest with your statutory duty of loyalty to the School. The School prohibits employees from working with another School or external organization that competes with the School whether as a regular employee or as a consultant.

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

This policy is in addition to the School's Revised Nonprofit Conflict of Interest Policy and Conflict of Interest Code.

#### **Outside Employment**

If you are a full time employee we expect that you devote your full professional effort to your position at the School. If you wish to participate in outside work activities you are required to obtain written approval from the Executive Director prior to starting those activities. Approval will be granted unless the activity conflicts with the School's interests. In general, outside work activities are not allowed when they:

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

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

#### **POLICY REGARDING INCONSISTENT, INCOMPATIBLE OR CONFLICTING EMPLOYMENT, ACTIVITY OR ENTERPRISE BY SCHOOL PERSONNEL**

##### **Policy Statement**

It is the policy of the School that its officers and employees may not engage in any outside activity, employment, or enterprise for compensation which is inconsistent, incompatible with, or in conflict with, his or her duties as an officer or employee of the School. During working hours or on school premises, officers or employees shall not engage in political or religious activities, or recruit or solicit students or members of the public for political or religious activities.

An officer's or employee's outside activity, employment, or enterprise for compensation shall be determined to be inconsistent, incompatible with, or in conflict with, his or her duties as an officer or employee of the School if any of the following apply:

1. It involves the use of the School time, facilities, equipment, supplies, or the officer's or employee's position or influence with the School, for private gain or advantage.
2. It involves receipt or acceptance by the officer or employee of any money or other consideration for the performance of an act that would otherwise be required within the scope of the officer or employee's duties with the School.
3. It involves the performance of an act as part of the outside activity that involves services performed for the School.
4. It affects the officer's or employee's work hours, interferes or conflicts with the officer's or employee's job duties, raises any ethical or conflict of interest concerns, or creates any conditions that impact the officer's or employee's job performance.
- 5.

Officers and employees may not use the School's name, logo, supplies, equipment or other property in connection with any outside activities.

##### **Procedure**

In the event that an officer or employee believes that an outside activity for compensation may be inconsistent, incompatible with, or in conflict with, his or her duties as an officer or employee of the School, the officer or employee shall obtain a written determination of the Executive Director or his or her designee that the outside activity is not in violation of this policy before engaging in such activity.

#### **EXPENSE REIMBURSEMENT POLICY**

The School policy is to reimburse its employees for all reasonable and necessary expenditures or losses incurred in direct consequence of the discharge of their duties.

##### **Personal Cell Phones**

Employees are not required to use their personal cell phones to perform work on behalf of the School. The School has provided employees with a Google Voice account or similar service for any calls related to School work. If an employee elects to use his or her personal cell phone, such use is a voluntary choice and is not reasonable or necessary to the performance of the employee's duties. As such, employees will not be reimbursed for using personal cell phones.

##### **Internet Expenses**

Employees are not required to use their personal internet access (WiFi) to perform work on behalf of the School. The School has provided employees with a mobile hot spot for any work performed on behalf of the School requiring Internet access. If an employee elects to use his or her personal Internet access, such use is a voluntary choice and is not reasonable or necessary to the performance of an employee's duties. As such, employees will not be reimbursed for using personal Internet access.

##### **Utilities**

Employees who are required to use some of their personal utilities (e.g. electricity) while performing remote work on behalf of the School may receive a stipend for reimbursement of the employee's use of their personal utilities. The School has reviewed objective data regarding the range of costs for utilities and established a \$15.00 utilities stipend per month based on its good faith belief that the stipend will more than fully reimburse employees for any reasonable and necessary expense incurred in using some of their personal utilities while performing

work on behalf of the School.

If an employee believes that the stipend is insufficient to reimburse all reasonable expenses necessarily incurred in using their personal utilities while performing work on behalf of the School, the employee must immediately report this expense issue to the School's Human Resources Department. Employees will be required to submit documentation to support any request for additional utilities reimbursement.

#### **Travel**

All teachers are expected to serve students in-person, that are assigned or requested on their roster and are required to drive up to 60 miles and/or one hour to meet with their students as part of their normal commute\*.

\*Commuting miles are the miles you drive between your home and regular workplace. These miles are viewed as a personal expense and can't be deducted in personal taxes or reimbursed as a business expense by your employer.

If and when the School requires employees to drive their personal vehicle to perform duties on behalf of the School (in the course and scope of employment) beyond their normal commute, the School will reimburse employees for the reasonable and necessary expense of using their personal vehicle on behalf of the School. Employees are not authorized to drive their personal vehicle on behalf of the School without written authorization from the Executive Director of the School.

If authorized to drive, employees will receive a monthly reimbursement payment from the School for mileage expenses incurred beyond the employees' normal daily commute of up to 60 miles and/or a distance of one hour from their home. Employees will be paid for mileage reimbursement at the per mile rate amount designated by the Federal Internal Revenue Service, at the time the miles are driven on behalf of the School.

Employees are required to submit:

- a monthly written report of all miles driven
- with a printed map showing the locations driven, on behalf of the School during that month.

If any employee believes that the mileage reimbursement that he or she receives from the School is insufficient to reimburse the employee for all reasonable expenses necessarily incurred by the employee in using his or her personal vehicle on behalf of the School, the employee must immediately report this expense issue to the School's Human Resources Department. Employees may be required to submit additional documentation to support any request for additional mileage reimbursement.

#### **Other Expenses**

With the exception of those employees who are required to use their personal utilities during the course and scope of their employment with the School, it is the School's policy to provide its employees with all necessary equipment to perform their duties on behalf of the School. The School does not require employees to purchase any additional equipment in order to perform work for the School. If any employee believes that additional equipment is reasonable and necessary to perform his or her duties on behalf of the School, the employee must immediately notify the School's Human Resources Department.

#### **Office Supplies**

The School will issue employees an allocated amount to utilize office supplies on a per semester basis for the purchase of ink (if applicable), paper and miscellaneous desk supplies (e.g. staplers, paper clips, writing utensils and file folders). Any other items outside these categories must be pre-approved by the employee's supervisor before an employee purchases any other item using the School issued gift card.. To the extent an employee believes additional funds in excess of the allotment due to employment status are reasonable and necessary to perform his or her job during the applicable semester, the employee must immediately notify the Human Resources Department. If the employee does not spend the allocated amount, the remaining balance does not transfer to the next fiscal school year.

If employees choose to purchase additional equipment or supplies without written authorization from the School, such expenses would not be reasonable or necessarily incurred in connection with work for the School. Those expenses would be optional expenses that employees voluntarily elect to incur and not reasonably necessary expenditures incurred by employees in direct consequence of the discharge of their duties for the School.

If, however, an employee believes that he or she has been required to incur any unexpected necessary and reasonable expense in order to perform his or her duties on behalf of the School, the employee should immediately report that expense to the School's Human Resources Department. Employees will be required to submit documentation to support any request for reimbursement of such expenses.

#### **Reporting**

If any employee believes that he or she has not been fully reimbursed for all reasonable and necessary expenses he or she has been required to incur while working for the School, the employee should immediately inform the School's Human Resources Department. All reports of possible inadequate reimbursement will be promptly reviewed, including a review of all of the employee's expense related records and receipts. If, as a result of the review, it is determined that the employee has been inadequately reimbursed for actual and necessary business expenses, the School will promptly reimburse the employee, in full, for all actual, reasonable and necessary business-related expenses incurred. It is every employee's responsibility to keep accurate records and receipts of all business related expenses for the purpose of requesting reimbursement.

There will be no retaliation against any employee who reports an expense reimbursement issue in good faith or who honestly assists in reviewing such an issue, even if the review produces insufficient evidence that there has been a violation.

#### **POLICY CONFIRMING RESTRICTION ON THE PROVISION OF FUNDS OR OTHER THINGS OF VALUE TO STUDENTS, PARENTS OR GUARDIANS**

##### **Policy Statement**

It is the policy of the School that the School shall not provide any funds or thing of value to any student or his or her parent or guardian that a school district could not legally provide to a similarly situated student, or his or her parent or guardian. The School does not and shall not provide, for example, "sign up bonuses" to parents or guardians or other incentives unrelated to education.

Additionally, a student, parent or guardian shall not use his or her status as a student, parent or guardian with the School in order to obtain funds or things of value from the School. For example, this policy prohibits an individual from utilizing his or her status as a parent or guardian to obtain a vendor contract with the School for compensation. It also prohibits an individual from utilizing his or her status as a parent or guardian to refer or encourage any students enrolled in the School, or their parents or guardians, to select that individual or his or her company or another provider of services, in connection with the student's education at the School, resulting in the individual's receipt of funds or thing of value from the School.

##### **Procedures**

The prior approval of the Executive Director or his or her designee must be obtained for any of the following in order to ensure that it does not conflict with this policy:

1. Any funds or thing of value provided to a student, parent or guardian which has not previously been approved. This applies in any situation in which a student, parent or guardian would any funds or thing of value, whether in their capacity as a student, parent, guardian, vendor, service provider or other circumstance.
2. Any proposed incentive to be offered to students or parents.

In requesting approval, the educational purpose of any such funds, thing of value or incentive must be provided to the Executive Director or his or her designee.

## SECTION 11 – SAFETY

### SUBSTANCE AND ALCOHOL POLICY

It is the intent of the School to promote a safe, healthy and productive work environment for all employees. The School recognizes that the illegal and/or excessive use of drugs and/or alcohol is not conducive to safe working conditions, employees' health, efficient operations, or School success. For purposes of this policy, "illegal drugs" includes, but is not limited to, substances that are prohibited by law (such as cocaine, heroin, etc.), controlled substances, marijuana (including medicinal marijuana and marijuana vaping or other recreational marijuana use), and prescription drugs (if they are not prescribed for the person using them and/or not being used as prescribed). "Drug paraphernalia" means any accessory for the use, possession, manufacture, distribution, dispensation, purchase, or sale of illegal drugs. "Under the influence" means that the employee is affected by alcohol, prescription medication that impairs cognitive or physical functions, and/or illegal drugs in any detectable manner.

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

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

Employees taking physician-prescribed medications, which impairs the employee's job performance, (including medical prescribed marijuana) should not report to work. In addition, if you are required to take any kind of prescription or nonprescription medication that will affect your ability to perform your job, you are required to report this to Human Resources. Human Resources will determine if it is necessary to temporarily place you on another assignment or take other action as appropriate to protect your safety and the safety of other employees and students. Employees taking physician-prescribed medication which will not impair their job performance may be required to present a statement from the prescribing physician to the employee's supervisor indicating the duration of the prescription and stating that the use of the prescription will not impair the employee's ability to perform his or her specific job duties. This policy does not require or request the prescribing physician or the employee to identify any prescription drug or the medical condition for which it is prescribed. No employee shall use or have in his or her possession on the School premises any prescription medication other than medications currently prescribed by a physician for the employee. This policy will not be construed to prohibit the use of alcohol at social or business functions. However, employees must remember their obligation to conduct themselves appropriately at all times while at School-sponsored functions or while representing the School.

The School may at times conduct unannounced searches of School property for alcohol, illegal drugs, drug paraphernalia, and/or unauthorized controlled substances or to ensure compliance with any other School-related policy. As a result, employees do not have an expectation of privacy in this regard. Violation of this Substance and Alcohol Policy may result in disciplinary action, up to and including termination, at the School's sole discretion. Employees should be aware that participation in a rehabilitation program will not necessarily prevent the imposition of disciplinary action, including termination, for violation of this policy. Employees who undergo voluntary counseling or treatment and who continue to work, if any, must meet all established standards of conduct and job performance. Compliance with this Substance and Alcohol Policy is a condition of employment at the School. Failure or refusal of an employee to cooperate fully, sign any required document, submit to any inspection, or follow any prescribed course of substance abuse treatment will result in discipline, up to and including termination. Because the use, sale, purchase, possession, or furnishing of an illegally obtained substance is a violation of the law, the School may report such illegal drug activities to an appropriate law enforcement agency.

The School may require a test by intoxicator, blood test, urinalysis, medical examination of those persons whom the School reasonably suspects of using, possessing, or being under the influence of a drug or alcohol or is acting in such manner that they may harm themselves or another employee.

Any refusal to submit to such testing will be considered a positive screen. An employee's consent to submit to such a test is required as a condition of employment, and an employee's refusal to consent may result in disciplinary action, including termination for a first refusal or any subsequent refusal. The School shall determine the manner in which such testing is conducted with the goal being to ensure that the test results are accurate.

Such a test may be required of employees involved in any work-related accident or unsafe practice where the safety of the employee or other employees was jeopardized. Periodic retesting may also be required following positive test results or after any violation of this policy or rehabilitation.

### SMOKING

All School buildings and facilities are non-smoking facilities. This includes nicotine and non-nicotine cigarettes including (herbal cigarettes) as well as e-cigarettes, vaping and/or pipes (both tobacco and marijuana products). Smoking is prohibited within 20 feet of a school building and within 25 feet of a school playground or event location.

### PARKED VEHICLES

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

### PERSONAL AUTOMOBILE

Employees who use their own automobiles for travel on authorized school business will be reimbursed for mileage at the rate established by the Internal Revenue Services and in accordance with the School's Reimbursement policies. Employees must have prior supervisory approval for the use of personal vehicles and must carry, at their own expense, the minimum insurance coverage for property damage and public liability.

### PERSONAL PROPERTY

The School cannot be responsible and will assume no liability for any loss or damage to employee personal property resulting from theft, fire, or any other cause on the School's premises, including the parking area, or away from school property while on school business employees are prohibited from using personal property for work-related purposes unless approved in advance by the Executive Director.

### SAFETY POLICY

The School is firmly committed to maintaining a safe and healthy working environment. All employees of the School are expected to be safety conscious on the job at all times. All unsafe conditions or hazards should be corrected immediately. Report all unsafe conditions or hazards to your supervisor or Executive Director immediately, even if you believe you have corrected the problem. If you suspect a concealed danger is present on School premises, or in a product, facility, piece of equipment, process, or business practice for which the School is responsible, bring it to the attention of your supervisor or Executive Director immediately. Supervisors should arrange for the correction of any unsafe condition or concealed danger immediately and immediately contact the Executive Director regarding the problem. All workplace injuries and illnesses must be immediately reported to your supervisor and Human Resources. The School has in place a written Injury and Illness Prevention Program as required by law. It is located in the main office for review.

### ERGONOMICS

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

### CHEMICAL EXPOSURE WARNING

Employees should be aware that work areas might contain chemicals known to the State of California to cause cancer or to cause birth defects or other reproductive harm. If you have any questions or concerns about possible chemical exposure in your work area, contact your Executive Director.



## SECTION 12 – TERMINATION

### **VOLUNTARY TERMINATION**

The School will consider an employee to have voluntarily terminated his or her employment if the employee does any of the following: (1) elects to resign from the School; (2) fails to return from an approved leave of absence on the date specified without notifying the school for the need for continued leave including failure to communicate with the School; or (3) fails to report for work without notice to the School for three consecutive work days. The School requests that employees provide at least two weeks written notice of a voluntary termination. All School property must be returned immediately upon terminating employment. The School retains the right to accept resignation immediately and pay the amount of straight time compensation an employee would have earned in lieu of further performance.

### **INVOLUNTARY TERMINATION**

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

### **EXIT INTERVIEWS**

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

### **VERIFICATION AND REFERENCE POLICY**

All requests for employment verification, references or personal information verification or disclosures must be directed to Human Resources. Only Human Resources is authorized to provide verifications or references, or disclose personal information, pertaining to current or former employees. With respect to verification requests, the School will disclose only the dates of employment and the title of the last position held. The School will verify or disclose additional information about the employee only if the employee provides written authorization for the School to provide the information. However, the School will provide information about current or former employees as required by law or court order. The School will not provide any letters of reference for current or former employees. Please refer all questions about this policy to Human Resources.

## EMPLOYEE HANDBOOK ACKNOWLEDGEMENT

By my signature below, I acknowledge that I have received a copy of the School Employee Handbook, on the date indicated below and agree to my at-will employment as described below. I acknowledge that it is my responsibility to read and review the Employee Handbook carefully. I also acknowledge that it is my responsibility to ask for clarification if I do not understand any of the policies included in the Employee Handbook.

I understand that the Employee Handbook contains important information regarding the School's expectations, policies and guidelines and that I am expected to comply with these expectations, policies and guidelines at all times. I understand that the Employee Handbook does not provide a binding contract, but provides guidelines for personnel concerning some of the School's policies.

In particular, I have read and understand the School's Anti-Nepotism Policy, Policy Regarding Inconsistent, Incompatible or Conflicting Employment, Activity or Enterprise by School Personnel, Policy Confirming Restrictions on the Provision of Funds or Other Things of Value to Students, Parents or Guardians, and restrictions and procedures to avoid Conflicts of Interest.

Just as I am free to terminate the employment relationship with the School at any time, the School, in its sole discretion, also reserves the right to modify or terminate the employment relationship with me at any time for any or no reason and with or without notice. Further, there is no agreement, express or implied, written or verbal, between the employee and the School for any specific period of employment, for continuing or long-term employment, or for guaranteed terms and conditions of employment. No one other than the Executive Director of the School, with the approval of the Board of Directors, has the authority to alter your employment at-will status, to enter into an agreement for employment for a specified period of time, or to make any agreement contrary to this policy. Further, any such agreement must be in writing and must be signed by the Executive Director. This is the entire agreement between the School and me regarding this subject. All prior or contemporaneous inconsistent agreements are superseded. If I have an individually negotiated written employment agreement with the School, then the terms and conditions of that agreement will prevail to the extent it differs from the policies in this Handbook.

The School reserves the right to modify, alter, add to or delete any of the policies, guidelines or benefits contained in this handbook at any time with or without notice. Other than the School Board of Directors, no other entity or person has the authority to modify this employee handbook.

Employee Name (print):

Employee Signature:

Date:

## Coversheet

### Discussion and Potential Action on Board Meeting Date Change for June 2021 and Calendar for the 2021-2022 School Year

**Section:** V. Governance  
**Item:** A. Discussion and Potential Action on Board Meeting Date Change for June 2021 and Calendar for the 2021-2022 School Year  
**Purpose:** Vote  
**Submitted by:** Darcy Belleza  
**Related Material:** 21-22 LVCS Board Calendar\_draft.pdf

**BACKGROUND:**

In order to have Governing Board-approved Local Control and Accountability Plan (LCAP) to school authorizer by June 16, 2021, it has been brought to staff attention that board meetings need to occur earlier in June 2021 than originally scheduled.

The Lake View June Board Meeting new date/time: Monday, June 14, 2021 @ 4:30 pm

**RECOMMENDATION:**

Recommended for approval.

# 2021-2022 Board Calendar



July 2021						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

August 2021						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

September 2021						
S	M	T	W	T	F	S
			1	2	3	4
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

October 2021						
S	M	T	W	T	F	S
					1	2
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10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

November 2021						
S	M	T	W	T	F	S
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7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

December 2021						
S	M	T	W	T	F	S
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5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

### Board Meeting Dates

July 28	Jan 26
Aug 25	Feb 23
Sept 29	Mar 23
Oct 27	Apr 27
Nov 17	May 18
Dec 8	June 22

### Holidays

Sep 6	Labor Day
Nov 11	Veteran's Day
Nov 25	Thanksgiving Break
Dec 20 - Jan 3	Winter Break
Jan 17	Martin Luther King, Jr. Day
Feb 11	Lincoln Day
Feb 21	Washington Day
Apr 11-18	Spring Break
May 30	Memorial Day

### Appendix- Important Due Dates

<b>October</b>	Unaudited Actuals
	11/1 Dashboard Indicators due to the State
<b>December</b>	Approval of Previous Years Audit
	12/15 First Interims due to County
<b>January</b>	2/1 SARC due to State
<b>February</b>	3/1 Comprehensive Safety Plan
<b>March</b>	3/15 Second Interims due to County
	3/31 Auditor Selection due to County
	4/1 Form 700s due to County Board of Supervisors
<b>April</b>	School Calendars
<b>May</b>	Public Hearing for LCAP
<b>June</b>	Adopted Budget
	Final Approval of LCAP
	Board Meeting Calendar

January 2022						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

February 2022						
S	M	T	W	T	F	S
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13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

March 2022						
S	M	T	W	T	F	S
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20	21	22	23	24	25	26
27	28	29	30	31		

April 2022						
S	M	T	W	T	F	S
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17	18	19	20	21	22	23
24	25	26	27	28	29	30

May 2022						
S	M	T	W	T	F	S
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15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

June 2022						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Holidays  
 Due Date (See Appendix)  
 Board Meeting

# Coversheet

## Discussion and Potential Action on Board Member Recruitment

**Section:** V. Governance  
**Item:** B. Discussion and Potential Action on Board Member Recruitment  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** lakeviewboardcover (1).pdf  
Sarah Wells-res.pdf

**BACKGROUND:**

Sarah Wells is interested in serving on the Governing Board of Lake View Charter School. She is a homeschooling parent and has a heart for parent choice in education.

Sarah Wells  
2280 Fern Ave, Chico, CA 95926  
(530) 321-6477  
[serrawells@gmail.com](mailto:serrawells@gmail.com)

19 May 2021

To the Board of Lakeview Charter:

I am writing to express my interest in serving on the Board of Lakeview Charter for the 2021/2022 school year. I have been a parent with the school for 4 years. I was initially drawn to Lakeview (then Inspire), because of the emphasis on supporting each family's unique homeschool journey. I have found this value to be upheld and felt very supported in the choices I make as a parent. As a board member, I will be a voice for continuing to support those choices, while maintaining the accountability necessary for the school as a whole to thrive.

I am interested in being a voice for our school to stay current and relevant in ongoing discussions of equity and inclusion and was happy to support the new MDIP program this year.

Thank you for your consideration.

I look forward to hearing from you!

Warmly,

Sarah Wells

P.S. Much of my professional life, I have been self-employed and my main job titles currently are mom, teacher and gardener! I share this with transparency to let you know that the attached resume is simplistic and created specifically for this position to give you an idea of who I am! ;)

## **Sarah Wells**

[serrawells@gmail.com](mailto:serrawells@gmail.com)

(530) 321-6477

### **Objective**

To introduce myself to the Board of Lakeview Charter

### **Experience**

2000-2015 Sole owner and creator of the business, Sacred Beginnings. Provided services and support for pregnancy, birth and early parenting. Duties included: teaching birth preparation classes and pre/postnatal yoga, massage and doula services, community outreach and marketing.

2014-2019 Served on a team responsible for creating the annual weekend long gathering for women and children in Butte County, Weaving Women's Wisdom. Duties included: collaboration with 12 other team members, outreach and planning, organizing site specific needs, communication and problem solving throughout event.

2000-2019 Seasonal work in SE Alaska for 9 (not consecutive) seasons. In this role, I was responsible for operating a 28 passenger tourist bus and sharing history and information with guests.

2010-present Motherhood. So you know, I do EVERYTHING!

### **Education**

1997 BA-English Literature, Willamette University, Salem, OR

2008 California Teaching Credential special ed program, CSU Chico

2009 Massage Therapist training, Heartwood Massage, Garberville, CA

### **About Serra**

Most folx know me as Serra, though I've never legally changed the spelling. I am currently; mom first, gardener and partner 2<sup>nd</sup>, fierce advocate for equity and social justice, community organizer, massage practioner, lover of learning, growth, community and communicating! I am seeking to be part of the board of Lakeview Charter to learn and to add my voice to those that care about the school and the future of kids in general.

# Coversheet

## Upcoming Compliance Items

**Section:** V. Governance  
**Item:** C. Upcoming Compliance Items  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** Upcoming Compliance Deadlines May 2021.png



Description	Completed By	Board Must Approve
<p><b>Extended Due Date - Form 990</b> - The IRS Form 990 is the annual information return filed by most non-profit charter schools. The form should be reviewed and accepted by the Board prior to filing.</p>	North Schools /Audit firm	Yes
<p><b>Submit Charter Schools Annual Information Survey</b> - The Charter Schools Annual Information Survey has 5 sections: location and school contact information, authorizing agency, site, curriculum and governance information, facilities, retirement and services information, and funding. The funding selection impacts how your school receives revenue payments. All charter schools must be either directly or locally funded. For example: LCFF apportionment funds for a locally funded charter school flow through its local chartering authority whereas funds for a direct funded charter school may flow directly to the county treasurer and then to the charter school. However, the funding type decision may impact the amount of other state and federal funds that a charter school receives, outside the LCFF. This decision may be reconsidered on an annual basis.</p>	Charter Impact	No
<p><b>Expanded Learning Opportunities Grant Plan</b> - must be completed by LEAs as a condition for receiving an ELO Grant. The Expanded Learning Opportunities Grant Plan must be adopted by the local governing board or body of the LEA at a public meeting on or before June 1, 2021, and must be submitted to the county office of education, the California Department of Education, or the chartering authority within five days of adoption, as applicable.</p>	North Schools with Charter Impact support	Yes
<p><b>Executive School Leadership Review Evaluation</b> – The board of directors is responsible for hiring and establishing the compensation (salary and benefits) of the executive director by identifying compensation that is "reasonable and not excessive". The board conducting the review should document who was involved and the process used to conduct the review, as well as the disposition of the full board's decision to approve the executive director's compensation (minutes of a meeting are fine for this). The documentation should demonstrate that the board took the comparable data into consideration when it approved the compensation.</p>	North Schools	Yes
<p><b>Local Control and Accountability Plan</b> - The LCAP is a three-year plan that describes the goals, actions, services, and expenditures to support positive student outcomes that address state and local priorities. The LCAP provides an opportunity for local educational agencies (LEAs) to share their stories of how, what, and why programs and services are selected to meet their local needs. The components of the LCAP for the 2021-2022 LCAP year must be posted as one document assembled in the following order:</p> <ul style="list-style-type: none"> <li>LCFF Budget Overview for Parents</li> <li>Annual Update with instructions</li> <li>Plan Summary</li> <li>Stakeholder Engagement</li> <li>Goals and Actions</li> <li>Increased or Improved Services for Foster Youth, English Learners, and Low-income students</li> <li>Expenditure Tables</li> <li>Instructions</li> </ul> <p>The LCAP must be presented at the same public meeting as the budget, preceding the budget hearing. LCAP and budget adoption must be at least 1 day after the public hearing.</p>	North Schools with Charter Impact support	Yes
<p><b>LCAP Federal Addendum</b> - Explain the LEA's strategy for using federal funds to supplement and enhance local priorities or initiatives funded with state funds, as reflected in the LEA's LCAP. This shall include describing the rationale/evidence for the selected use(s) of federal funds within the context of the LEA's broader strategy reflected in the LCAP.</p>	North Schools	Yes
<p><b>Submit Preliminary Budget Plan to Authorizer</b> - Charter Schools are required to submit their annual budgets to their authorizer by the authorizer-imposed deadline. Authorizers then use the budget to determine if the Charter School has reasonable financial health to sustain operations.</p> <p>The budget must be presented at the same public meeting as the LCAP, following the budget hearing. LCAP and budget adoption must be at least 1 day after the public hearing.</p>	Charter Impact	Yes
<p><b>Approve school calendar and instructional minutes</b> - 180/175 days charter schools and are allowed to shorten instructional year by 5 days without fiscal penalty. Kindergarten ~ 600 hours; Grades 1-3 ~ 840 hours; Grades 4-8 ~ 900 hours; Grades 9-12 ~ 1080 hours</p>	North Schools with Charter Impact support	Yes
<p><b>Review your Parental Involvement Policy</b> - Every local educational agency (LEA) in California must have a parental involvement policy. Federal requirement (LEAs accepting Title I funds). State requirement (California Education Code [EC] for non-Title I schools). Parents must be involved in how the funds reserved for parental involvement will be allocated for parental involvement activities. Keep minutes and sign-in sheets documenting these discussions. The California Department of Education (CDE) reviews the Consolidated Application and Reporting System (CARS) to see if the required reservation has been made.</p>	North Schools	Yes
<p><b>Review your Homeless Education Policy</b> - A Homeless Education Policy is used to ensure that your school is compliant with key provisions of the Education for Homeless Children and Youths Act. It is also used to collect the contact information for your required designated homeless liaisons at your school. All schools are required to establish a board approved Homeless Education Policy.</p>	North Schools	No
<p><b>Complete Consolidated Application reporting - Spring</b> - The Consolidated Application (ConApp) is used by the California Department of Education (CDE) to distribute categorical funds from various state and federal programs to county offices, school districts, and direct-funded charter schools throughout California. Annually, in May, each local educational agency (LEA) submits the spring release of the application to document participation in these programs and provide assurances that the district will comply with the legal requirements of each program.</p>	Charter Impact with North Schools support	Yes
<p><b>Nonclassroom-Based Funding Determination</b> - Charter schools with an existing funding determination ending in 2020/21 must request a funding determination on or before February 1. Education Code [EC] Section 47612.5 prohibits charter schools from receiving any funding for nonclassroom-based instruction unless the State Board of Education (SBE) determines its eligibility for funding.</p> <p><b>NOTE: This due date was extended. Per SB820, Section 75, a school is deemed to have met the spending and PTR requirements as long as the FDF form is completed and submitted by 6/30/21.</b></p>	Charter Impact	No